DECISION

Subject: **Memorandum of Understanding for the implementation of the COST Action "Empowering the next generation of social enterprise scholars" (EMPOWER-SE) CA16206**

The COST Member Countries and/or the COST Cooperating State will find attached the Memorandum of Understanding for the COST Action Empowering the next generation of social enterprise scholars approved by the Committee of Senior Officials through written procedure on 23 June 2017.

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MEMORANDUM OF UNDERSTANDING

For the implementation of a COST Action designated as

COST Action CA16206
EMPOWERING THE NEXT GENERATION OF SOCIAL ENTERPRISE SCHOLARS (EMPOWER-SE)

The COST Member Countries and/or the COST Cooperating State, accepting the present Memorandum of Understanding (MoU) wish to undertake joint activities of mutual interest and declare their common intention to participate in the COST Action (the Action), referred to above and described in the Technical Annex of this MoU.

The Action will be carried out in accordance with the set of COST Implementation Rules approved by the Committee of Senior Officials (CSO), or any new document amending or replacing them:
   a. "Rules for Participation in and Implementation of COST Activities" (COST 132/14);
   b. "COST Action Proposal Submission, Evaluation, Selection and Approval" (COST 133/14);
   c. "COST Action Management, Monitoring and Final Assessment" (COST 134/14);
   d. "COST International Cooperation and Specific Organisations Participation" (COST 135/14).

The main aim and objective of the Action is to achieve a full understanding of the diversity of SE models across Europe and globally, their conditions of emergence and development and their contribution to the general interest.. This will be achieved through the specific objectives detailed in the Technical Annex.

The economic dimension of the activities carried out under the Action has been estimated, on the basis of information available during the planning of the Action, at EUR 120 million in 2016.

The MoU will enter into force once at least five (5) COST Member Countries and/or COST Cooperating State have accepted it, and the corresponding Management Committee Members have been appointed, as described in the CSO Decision COST 134/14.

The COST Action will start from the date of the first Management Committee meeting and shall be implemented for a period of four (4) years, unless an extension is approved by the CSO following the procedure described in the CSO Decision COST 134/14.

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OVERVIEW

Summary
Social enterprise (SE) are organizations which combine an entrepreneurial dynamic to provide services or goods with a primacy of social aims. SE naturally cross various types of borders; sectoral (public, business, cooperatives, associations), resources (drawing them from the market, public procurement, grants, and philanthropy) and activity fields (personal services, finance, recycling industry, energy and transport, food supply chains...).

This EMPOWER-SE Action aims at

(1) contributing to a comprehensive understanding of the diversity of SE models emerging across Europe and globally; their conditions of emergence and development; and their contribution to key industries for the development of sustainable societies by overcoming existing fragmentation in the levels of knowledge from both a geographical and a disciplinary point of view;

(2) empowering the next generation of SE scholars, focusing on expanding the SE scientific community to less research-intensive countries where it is still embryonic or non-existing; and

(3) fostering evidence-based policy from local to European levels and supporting the development of SE and their eco-systems in synergy with main industry representatives and stakeholders. The Action will implement networking mechanisms (working groups, conferences, meetings, workshops for policy-makers, local stakeholder talks, short-term scientific missions, training schools, communication tools including stakeholders briefs, and web-based dissemination) to connect fragmented communities and to contribute to closing the gap between the scientific community, policy- makers and society throughout Europe and beyond.

Areas of Expertise Relevant for the Action	Keywords
● Political Science: Social policies, welfare state	● social enterprise
● Economics and business: Organization studies	● social economy
● Economics and business: Sustainability	● third sector
	● social and societal challenges

Specific Objectives
To achieve the main objective described in this MoU, the following specific objectives shall be accomplished:

Research Coordination
● Identifying and bridging the variety of SE conceptions and models in each national contexts thus reflecting the diversity of welfare regimes, and socio-economics contexts by bringing together researchers from different geographical areas.
● Bridging different epistemological traditions (business, economics, sociology, political science, psychology, education, geography ansd other social sciences.
● Gathering evidence and analysing the innovative contribution of SE in at least five key industries for the development of sustainable societies (migration, renewable energy and transport, health and social care, food supply chains, social finance, circular economy etc).
● Equipping major non-research SE stakeholders with robust knowledge to understand the different models of SE and the institutional factors and organizational choices that shape these models in order to develop a

supportive eco-system including relevant social, labour and economic policies through the organization local talks.

Capacity Building
● Gather scholars from different disciplines and geographical backgrounds to bridge separate geographical and disciplinary boundaries in the development of SE knowledge (66 proposers + scholars participating in the conferences and workshops).
● Integrate researchers from COST inclusiveness target countries and young scholars into the international SE research community with the support of established scholars.
● Train and strengthen a pluridisciplinary community of PhD students in the field of SE particularly, from COST inclusiveness target countries.
● Foster new comparative research proposals, joint publications and mobility actions for enhancing comparative International research projects on SE.

1) S&T EXCELLENCE

A) CHALLENGE

I) DESCRIPTION OF THE CHALLENGE (MAIN AIM)

The concept of social enterprise (SE), loosely defined as "organizations which combine an entrepreneurial dynamic to provide services or goods with a primacy of social aims", emerged 20 years ago but has only boomed in the past decade both in science, in praxis and policy-making (European Commission, 2015, 2016; Expert Group on Social Entrepreneurship of the European Commission (GECES), 2016). The contribution that SEs make to society is recognized: "Social enterprises contribute to smart growth by responding with social innovation to needs that have not yet been met; they create sustainable growth by taking into account their environmental impact and by their long-term vision; they are at the heart of inclusive growth due to their emphasis on people and social cohesion." (European Commission, 2011: 3).

SEs naturally cross various types of borders; sectoral (public, business, cooperatives, associations), resources (drawing them from the market, public procurement, grants, and philanthropy) and activity fields (Defourny et Nyssens, 2016). The social missions of SEs guide the activity field where they operate ranging from more traditional ones (access to social services and health, work integration) to the most innovative ones (migration, ageing, finance, energy and transport, food supply chains, circular economy, collaborative economy, commons, etc.).

In fact, SEs have existed since well before the mid-1990s. Indeed, the third sector, often called the non-profit sector, the voluntary sector or the social (and solidarity) economy has long witnessed entrepreneurial dynamics which resulted in innovative solutions for providing services or goods to communities whose needs were neither met by private companies nor by public providers (Salomon, 1987). However, the concept of "social enterprise" is now gaining a fast growing interest globally along with two closely related terms, namely "social entrepreneur" and "social entrepreneurship" (Mair & Marti 2006; Nicholls 2010; Bacq & Janssen, 2011).

In the last two decades, the quest for a widely accepted definition of SE has been a central feature of a number of publications. In spite of many attempts, a number of key criteria have emerged including: the specific role of individual social entrepreneurs as described by Dees (1998); the place of social innovation from the works of Young (1983) through those of Mulgan (2007); the search for market income as developed by Skloot (1983); the allocation of profits to the fulfilment of the social mission as specified by the British government (DTI, 2002) and the issue of governance to achieve a sustainable balance between economic and social objectives (Hulgård & Pestoff, 2014). The role of different actors - civil society, state and businesses - in the institutionalisation process of SEs is also widely debated (Evers & Laville, 2004).

Various tentative definitions, combining some or all of these features, were put forward but they often created confusion among researchers, policy-makers, observers and new comers to the "SE field". Differences between the meanings of SE in continental Europe and the Anglo-

Saxon countries have been explained in terms of the different institutional frameworks (Kerlin, 2013, Defourny & Nyssens, 2010; Galera & Borzaga, 2009; European Commission, 2016).

While SEs are influenced by institutional factors at a macro-level, their objectives and organizational features are also shaped by a variety of institutions, at a meso-level, within every single national context such as historical traditions, existing norms and discourses. This implies that supporting the development of SEs cannot be done just through exporting one universal SE model. Unless they are embedded in local contexts, SEs will just be replications of a formula that will last only as long as they are fashionable and funded. It needs to be acknowledged that SEs are fully rooted in local practices that combine the endogenous characteristics and socio-economic contexts and the exogenous influences about the concept itself (e.g., whether the notion originated as a result of the promotion of international organizations and private donors).

Therefore, in order to advance knowledge and to develop evidence-based policy for fostering a sustainable SE eco-system, there is an urgent need to acknowledge the huge diversity of SE models in different industries, which are key areas for the development of sustainable societies. It is imperative to link research efforts to the vast diversity of empirical developments in the SE field. This is not to say field realities have not been carefully observed or analysed to date. On the contrary, a great deal of existing empirical work is extensively used in case study based teaching. Nevertheless, case studies do not bring much evidence about the wide spectrum of SE models: they are precisely selected to illustrate a specific model or issue in a given context.

There is a challenge in achieving a full understanding of the diversity of SE models across Europe and globally, their conditions of emergence and development and their contribution to the general interest. Three central research questions emerge:

What are the SE conceptions and models in which SE practices and policies are embedded in each national/regional context?

What are their innovative contributions in answering new social and ecological needs (migration, health and social care, energy and transport, food supply chains, finance, circular economy, etc.) central for to the development of more sustainable societies?

What institutional development (public policies, legal forms, inter-sectoral partnerships etc.) can support the scaling up and sustainability of these different SE models?

To address these questions it is crucial to overcome existing fragmentation in the levels of knowledge regarding SEs, from a geographical, a disciplinary point of view as well as from categories of stakeholders. Indeed, in some countries, the SE scientific community is still embryonic or inexistent. Moreover, the majority of the work has been traditionally presented from a business perspective, which is, of course, relevant but unfortunately not sufficient to provide an in-depth understanding of the SE field. Finally, there is an urgent need to foster the dialogue between the scientific community with other SE stakeholders to deepen the understanding of the challenges faced by SEs, and inform the development of innovative social, labour and economic policies and practice interventions related to SE. Therefore, to address these limits, the approach adopted in this COST Action is based on three types of networking:

Enlarging (in geographic scope and age) the network of researchers engaged in the production of knowledge about the SE field;

Widening the spectrum of disciplinary perspectives involved in the SE debate;

Connecting researchers and SE stakeholders in creating shared understandings given the varied nature of stakeholders involved in the Action: industry representatives, practitioner umbrella organizations (EU and national levels), and international organizations.

II) RELEVANCE AND TIMELINESS

Most of the research on SEs originates from North America and Western Europe, with less focus on COST inclusiveness target countries. Since SE is a concept embedded in socio-economic contexts, it is vital to facilitate the connecting of existing local knowledge and establishing a programme for cross-national comparative research including these peripheral

regions. Currently, knowledge on SEs is disparate with uneven levels of quality and research infrastructure across the countries and with a disjointed evidence base located in a too narrow disciplinary approach. Moreover, young researchers exist but often work in isolation.

In terms of policy developments, the interest in SE is exemplified by the significant and innovative policy support package for SE launched by the European Commission in 2011; the Social Business Initiative (SBI). The focus of this initiative is to create a conducive environment for SEs with an emphasis on legal frameworks, access to finance tools and visibility. Two mappings of SEs in Europe (the first one in 2014 and the update of seven countries published in November 2016), a financial instrument targeting SEs and the set-up of an experts' group (GECES) are some of the measures implemented in the last five years. While the first SBI is currently being evaluated, plans for the second phase of this policy package are currently under way. The European Parliament recently decided to re-launch the "Intergroup on Social Economy" in order to monitor developments in this areas (which includes SEs), and mobilise political support for the sector. In parallel with these developments at the EU level, many States have developed their own policies at the national and regional level. Municipalities are showing an increased level of activity with regard to supporting SEs in their territories. However, despite these important policy steps, a lack of shared understanding regarding the diversity of SE models, a sense of fragmentation and a lack of representative voice(s) are often cited as key challenges for the sector. Key SE stakeholders, (practitioners, policy makers, incubators of SEs) are increasingly seeking reliable knowledge from the scientific community to improve their understanding of SEs.

Four actions are needed to move this proposition forward:
- Support the development of original knowledge on SE models based on a pluridisciplinary approach and taking into account the diversity of contexts where SEs are emerging.
- Open up and strengthen the research community to countries with none or a limited tradition of SE research.
- Activate, train and facilitate networking opportunities for researchers with a special focus on young researchers.
- Connect the research community with a diversity of SE stakeholders.

These four elements will strengthen the research infrastructure especially in COST inclusiveness target countries where SE research is, most of the time, absent. These actions will be achieved through the implementation of Research Coordination Objectives and Capacity-building Objectives, which are explained below.

B) SPECIFIC OBJECTIVES

I) RESEARCH COORDINATION OBJECTIVES

Connected to the three research questions identified above, the Action aims at:
- Identifying and bridging the variety of SE conceptions and models in each national contexts thus reflecting the diversity of welfare regimes, and socio-economic contexts by bringing together researchers from different geographical areas (34 participant countries, more than 40% inclusiveness target countries, and three international partners).
- Bridging different epistemological traditions (business, economics, sociology, political science, psychology, education, geography and other social sciences);
- Gathering evidence and analysing the innovative contribution of SEs in at least five key industries for the development of sustainable societies (migration, renewable energy and transport, health and social care, food supply chains, social finance, circular economy etc.).
- Equipping major non-research SE stakeholders with robust knowledge to understand the different models of SEs and the institutional factors and organizational choices that shape these models in order to develop a supportive eco-system including relevant social, labour and economic policies through the organization local talks (34 in total, one per partner country).

The Action seeks to gather scholars from different disciplines and geographical backgrounds to bridge separate geographical and disciplinary boundaries in the development of SE knowledge (more than 60 proposers + scholars participating in the conferences and workshops).

Integrate researchers from COST Inclusiveness Target Countries and young scholars into the international SE research community with the support of established scholars (More than 30 Early Career investigators + young scholars participating in conferences and workshops).

Train and strengthen a pluridisciplinary community of PhD students in the field of SE particularly, from COST Inclusiveness Target Countries (two Training Schools gathering at least 70 PhD students + special sessions dedicated to PhD in the conferences and workshops).

Foster new comparative research proposals, joint publications (two books, three special journal issues) and mobility actions (at least 15 Short Term Scientific Missions) for enhancing comparative International research projects on SEs.

C) PROGRESS BEYOND THE STATE-OF-THE-ART AND INNOVATION POTENTIAL

I) DESCRIPTION OF THE STATE-OF-THE-ART

Meanings and forms of SEs vary according to the context being strongly shaped by disciplinary traditions, institutional frameworks and discursive fields (see 1.1.1). To classify the different conceptions of SE, different schools of thought have been identified (Defourny & Nyssens, 2010). For the "earned income school", SE is mainly defined by earned-income strategies. A distinction between a version focusing on non-profits becoming more commercial in order to diversify their funding base in support of their social mission (Weisbrod 1998) can be made with a broader version, embracing all forms of business initiatives (Austin et al. 2006). A second school puts the emphasis on innovative social entrepreneurs in the Schumpeterian meaning of the term, in a perspective similar to that adopted earlier by the pioneering work of Young (1986). Moreover, the systemic nature of innovation brought is often underlined (Dees, 1998). Finally, the "EMES school" – named after the European network of researchers devoted to SEs - has tried to identify the specificities of SEs emerging at the crossroads of the market, civil society and public policy. While stressing a social aim embedded in an economic activity as in the two previous schools, this approach differs from them in that it also stresses democratic governance models.

Because of the different conceptions of SE, coexisting to varying extents in most parts of the world including Europe; one approach cannot be viewed as fully representative of the concept in any world area. Some typologies of SE models have drawn from different schools of thought. The market reliance criterion does certainly provide a potential cornerstone to build a classification of SE types. This is particularly the case when SE types are presented along a single-dimensional continuum between two extremes made of a "purely philanthropic" and a "purely commercial" pole (Dees, 1998). Similarly, Alter (2007) focuses on the role of market logics to put forward a typology based on mission orientation, the nature of target markets and the degree of integration of business activities in social programs.

At a broad macro level, Kerlin (2013) adopts an institutional perspective inspired by the "social origins" theory developed by Salamon and colleagues in 2000. She tries to identify key features of macro-institutional frameworks in various countries to show how institutions at national levels tend to shape different types of SEs. At a meso-level, Young and Lecy (2014) propose the metaphor of a "social enterprise zoo" composed by different animals behaving differently from one another and may (or may not) interact with one another in both competitive and complementary ways as do SEs which combine social and market goals in substantially different ways. In such a line, several authors have proposed typologies of SE (Spear et al., 2009; Gordon, 2015; Teasdale, 2012).

II)   PROGRESS BEYOND THE STATE-OF-THE-ART

How to explain this diversity at a meso-level? What are the SEs innovative contributions and their impacts in key industries? Which institutional frameworks (including public policies) do foster their development? These remain unanswered questions. This COST Action will move beyond the state of the art by adopting a meso-level perspective which mixes institutional factors and organizational choices to highlight variables that are shaping key facets of SEs and providing grounds to better understand the diversity of SE types in five key innovative industries for the development of sustainable societies,

Our first working hypothesis, based on an explorative database at the international level gathered by the main proposer (not yet published), is that four models can be identified: (1) *entrepreneurial non-profit organizations developing earned-income in support of their social mission*; (2) *social cooperative usually resulting from a move of mutual interest cooperatives towards a behaviour giving more importance to the general interest*; (3) *social businesses which are mission-driven business*. The debate remains open when some activities oriented to social goals are just part of a Corporate Social Responsibility (CSR) strategy ultimately serving a profit-maximization purpose (4) Although SEs are generally seen as private initiatives, social enterprises can emerge as "public-sector spin-offs" due to their connections to some state usual responsibilities. The identification of four major models does not prevent us from being fully aware that SEs are hybrid organizations, per se, combining market and non-market logics, economic, social and political goals (Doherty et al., 2014). Moreover, partnerships between for-profits and non-profits and those involving local public authorities are quite common. Most of the time, however empirical evidence shows that a dominant partner can be identified which deeply influences the adopted model even if in some cases, the hybrid nature of a SE has become organic.

While social enterprises are influenced and constrained by institutional tone-givers, they may be able themselves to impact institutional arrangements. They are institutional entrepreneurs" capable of responding to institutional pressures and taking part in the shaping of institutional arrangements. While the first, "structural" perspective has been developed by early institutional theorists (DiMaggio & Powell 1983), the second, "agency" perspective has emerged more recently, under the banner of institutional entrepreneurship (Battilana et al. 2009) and institutional work (Lawrence & Suddabay et al. 2009). This COST Action, while using bridging notions such as the "institutional logics" framework (Thornton & Ocasio 1999) or the "political embeddedness" concept (Laville et al. 2006), will advance the hypothesis that public policies and norms are the result of interactions among social enterprises, public authorities and for-profit companies.

These two hypotheses will be operationalized in at least five different industries. This perspective will enable to analyse (1) the organizational choices adopted by SEs (economic and governance models), (2) their innovative contributions in answering new social and ecological needs central for the development of more sustainable societies, (3) the institutional development (public policies, norms, legal forms, inter-sectoral partnerships etc.) which can support the scaling up and sustainability of these different SE models.

III)   INNOVATION IN TACKLING THE CHALLENGE

The core innovation of this networking Action is to reach the Research Coordination objectives and the Capacity-building objectives thanks to connecting:

- ■ countries with a limited research tradition on SEs and leading Western Europe countries;
- ■ experienced researchers and talent in the form of early-stage researchers;
- ■ different epistemological traditions;
- ■ different geographical and socio-economic backgrounds;

SE researchers and other stakeholders, practitioners (via the EU and national umbrella organizations and a global SE incubator) and policy-makers at all levels and the Cost National Coordinators (CNC).

The analytical approach allows to adopt a critical frame, escaping from 'smart models' well shaped by promoting private or public institutions, which means weakening temptations and opportunities of appropriation of the SE phenomenon by specific interests. It focuses on the interactions between endogenous SE characteristics and local socio-economic contexts and exogenous influences, acknowledging the diversity of SE models in different industries.

Moving beyond national and disciplinary approaches and working closely with SE stakeholders, the Action can contribute to unlock the whole SE potential as it can actually be observed at the grassroots level and to develop evidence-based local, national and international policies targeted to the development and advancement of different SE models across different industries which are key for the development of sustainable societies.

D) ADDED VALUE OF NETWORKING

I) IN RELATION TO THE CHALLENGE

To address the challenge, it is crucial to overcome fragmentation in the knowledge regarding SEs, from a geographical and an epistemological point of view and between researchers and other stakeholders. The member composition of the Action opens the SE field in three ways in order to produce innovative knowledge and tools for SE stakeholders:

By incorporating researchers from a diversity of contexts:

- Researchers from 37 countries are proposers of the Action among which more than 40% are less research-intensive COST countries; four from countries of EU Neighbourhood region (Armenia, Georgia, Lebanon, Russian Federation), and three International Partner Countries (Australia, Brazil, United States). In addition to the phenomenal coverage, complementarity and quality of the proposed Action, the nertwork will work to expand the commitment of researchers from Inclusiveness Target Countries, NNC (Near Neighbour Countries) and IPC (International Partners Countries)
- Early Career Investigators (more than 40%) plus numerous PhDs who often work in isolation from international scholars as these subjects remain most often invisible at the local level.
- Female researchers: The Main Proposer is a woman and more than 60% of the consortium is female; gender perspectives will also critically inform the Action's scientific endeavour.
- By linking different disciplines including business, economics, sociology, political science, psychology, education, geography and other social sciences.
- By connecting researchers to SE stakeholders (policy-makers and practitioners through umbrella organizations) and CNCs (Cost National Coordinators) in the consolidation of a research community that is fully aware of the need to collaborate to support evidence-based policymaking. The points of connection with policy-makers and practitioners will be numerous (via specific networking mechanisms and targeted outputs) and supported by the two industry representatives, who themselves collaborate with policy-makers.

Networking mechanisms (working groups, conferences, workshops, local stakeholder talks for policy-makers, Short-Term Scientific Missions (STSMs), Training Schools, communication tools including stakeholders' briefs, electronic media, and web-based dissemination) are particularly relevant tools to connect these fragmented communities and to contribute to closing the gap between the scientific community, policy-makers and society throughout Europe and beyond.

II) IN RELATION TO EXISTING EFFORTS AT EUROPEAN AND/OR INTERNATIONAL LEVEL

Various research projects have been developed and supported in the last 10 years in Europe on SEs (PERSE, SELUSI, SEFORÏS, EFESEIIS, Mapping of SE eco-system in Europe etc.) but each of these projects generally relies on one specific "school of thought" (see 1.C.I), on a limited set of countries and disciplinary backgrounds. This Action complements these research programmes while nurturing networks of researchers and contributing to the exchange with

other stakeholders in the co-construction of evidence-based policy making to support the SE eco-system.

The Action is likely to be received very positively given its research-driven dynamic, inclusiveness and openness towards new generations, peripheral countries and different epistemologies. Indeed, researchers from the main international associations and networks of researchers on the wider related topics of social and solidarity economy, third sector, non-profit studies, and social innovation, and of different disciplines and fields such as economics and business, sociology, political sciences, among others, are included in this Action, entitled EMPOWER-SE (Empowering the next generation of SE scholars).

The Action will benefit from existing connections with the GECES, the European Economic and Social Committee (EESC), the European Parliament Intergroup on the Social Economy and the UN Task Force on Social and Solidarity Economy (UNTFSSE) thus opening the door to numerous international organizations interested in SEs. In addition to policy-related networks, the Action will connect with practitioner umbrella organizations at the European and national levels through the two industry representatives.

2) IMPACT

A) EXPECTED IMPACT

I) SHORT-TERM AND LONG-TERM SCIENTIFIC, TECHNOLOGICAL, AND/OR SOCIOECONOMIC IMPACTS

The core scientific impact is the development of original knowledge through the following:
Identifying and bridging the variety of SE conceptions and models by bringing together researchers from different geographical areas and different epistemological traditions.
Gathering evidence and analysing the innovative contribution of SEs to key industries for the development of sustainable societies such as migration, renewable energy and transport, health and social care, food supply chains, social finance, circular economy.
Scientific impact will be reached through working groups (WG), academic conferences, scientific publications, Training Schools, and STSM in research centres with a solid research tradition on SEs and by associating early-stage and peripheral country researchers with recognized scholars via collaborative research activities.

Early Career Investigators
This category covers postgraduates pursuing a PhDs and recent associate professors or post-docs to build their capacity as emerging researchers. They will find a unique opportunity to integrate with a broad multidisciplinary scientific community that allows them to share their ongoing research. They will also be able to impact their immediate communities by leading an effort to make SEs more visible and documented in their countries. In the medium term, this Action will provide networking and leadership opportunities for emerging talents and thereby strengthen and build a SE scientific community of excellence. In the specific case of PhDs, they will find an unmatched training opportunity and an exposure to the latest research by the leading international scholars.

Researchers from ITC Countries
In the short run, the Action strengthens the COST Inclusiveness Policy by fostering improved access and integration of researchers from less research-intensive countries into the wider SE community. The goal is to enlarge the network of actors producing knowledge about the SE field by including peripheral countries and by widening the spectrum of epistemological perspectives involved in the debate. These are channels to overcome fragmentation of knowledge in the SE field by connecting existing local knowledge.
In the medium term, the aim is to create synergies with the EU, nationally and other privately funded research projects on SE and to prepare future H2020 proposals. Lastly, the Action aims

to be a channel to include peripheral and new generation researchers beyond the end of the COST funding in to existing International SE scientific networks.

Socio-economic impact
The debate regarding SEs is now on both the public and the private agenda. Indeed, the public sector, the private sector and the civil society, each in its own way, are (re)discovering new opportunities to promote, simultaneously, entrepreneurial spirit and the pursuit of the public good. However, a feeling of confusion dominates among policy-makers and practitioners, observers and new comers to the "SE field" for reasons linked to fragmentation and lack of representative voice(s).

The Action will focus on two categories:
Policy-makers
As already noted, nowadays policy-makers at all levels seek to have evidence supporting the increasingly complex decisions involved in the creation of policies addressing societal challenges. Indeed, the research was identified as a key lever for the development of SEs in Europe in the SBI strategy launched in 2011 and it is likely to play a crucial role in the second phase of this EU-wide strategy. The Action will therefore provide solid knowledge via a comprehensive conceptual approach to SE field that allows policy-makers to better understand the different models of SEs, their innovative contributions in key industries and their implications for the eco-systems with a specific focus on social, labour and economic policies that can foster SE development.

Practitioners
In peripheral countries, the ways in which the praxis of SE has occurred is very varied thus representing different institutional developmental paths. Very rarely, there is a sense of community and so this Action, in collaboration with the umbrella organization and the global SE incubator network, will gather some of these practitioners around relevant crucial topics, thus opening the door to further interaction between research and practitioners. This is usually a win-win relationship as SEs offer unique data for researchers to tap into and SEs can learn a lot from the sector about their own dynamics via the reflective effort they do through research. Given the confusion that exists in some countries around SE topics, a focused research-driven interaction like the one proposed by EMPOWER-SE could be considered as an attempt to introduce greater clarity to what is happening in the field both at local and global levels
Specifically, the Action will connect researchers and SE stakeholders:
At the local level via the "EMPOWER-SE Talks" where SE researchers will interact with policy-makers and practitioners on the basis of the issues identified during the joint scientific work. The goal of these talks is to frame the debate on SEs at the national level by sharing findings from the Action, learning from initiatives coming from other contexts, and creating local connections to advance the SE research and policy agenda.
At the EU/international levels via the sessions specifically aimed at international policy-makers during the two conferences, there will be a chance to learn how SE research can contribute to the policy-making process.
Worldwide observers and newcomers to the SE field will be reached via easy-to-digest podcasts and stakeholder briefs clearly explaining and illustrating transversal notions of SEs. The series will be available in English, although researchers will be encouraged to translate them into their own national languages.

B) MEASURES TO MAXIMISE IMPACT

I) PLAN FOR INVOLVING THE MOST RELEVANT STAKEHOLDERS

The plan for involving the three main stakeholder groups (researchers, policy-makers and practitioners) is described below and will be implemented by the Management Committee (MC) through WGs.

Researchers (with a focus on PhDs, early-stage scholars and peripheral country researchers)
The uniqueness of the Action relies on the fact that for the first time it involves a key group of SE researchers from over 38 countries, many of them peripheral countries, over 60% of them female and over 50% Early Career researchers (this percentage excludes the numerous PhDs interested in the Action). Each WG will be led by a group of two or three scholars where at least one will be female and one peripheral country representative. In addition, WG are constructed to get a balanced composition among scientific disciplines, geographical origins and age. The various COST networking tools promoted within the Action will aim at exchanges with peripheral countries and with policy-makers and practitioners. Indeed, researchers will participate in the organization of many of these activities (WG meetings, conferences, stakeholder local talks). For instance, STSMs will offer unique opportunities for researchers who may have never studied SEs outside their country to be exposed to new traditions and approaches while Training Schools will be organized in peripheral countries by local researchers designed to attract PhDs.

Policy-makers
They will be activated at two levels. At the national level, public administrators will be invited to take an active role in the "EMPOWER-SE Talks". At the European level, a specific session aimed at policy-makers will organized in each of the two international conferences. Policy-makers will be invited to make sure that new research evidence is brought up to the European level in order to support the development of both European and Member State level policy. In addition, the Action will explore with policy-makers and practitioners how to integrate new knowledge within the educational system at various levels, including life-long education.

Practitioners
They will be activated via the researchers themselves and via the two industry representatives associated with the Action. The local "EMPOWER-SE Talks" will provide a unique opportunity for researchers to offer support to its local practitioner community through sharing the comparative knowledge produced as a result of the Action. The umbrella organization gathering European SE and the global SE incubator networks will make sure that all the local events reach a higher scale by gathering the various inputs and extracting lessons relevant for the SE field.
In relation to the various categories, it is worth noting that many researchers participating in the Action are connected to executive master courses, which include both practitioners and prospective PhD researchers.

II) DISSEMINATION AND/OR EXPLOITATION PLAN

The process and results of this Action will be shared with relevant stakeholders with three priorities in mind: accessibility, visibility and timeliness.
A Dissemination Board (DB) will be set up to develop and execute the dissemination plan. The DB will comprise of an elected dissemination officer, a website dissemination member and a representative from each WG. The DB will work closely with other Action organisational structures to coordinate key dissemination actions, summarized below together with expected indicators:

Action	Dissemination indicators
1. *Publications:* The scientific work will be disseminated beyond the direct participants firstly through individual scholarly publications in leading peer-reviewed journals, as well as conference and workshop proceedings special issues (three scientific journals have been already identified in this perspective) and special volumes as part of some of the ongoing series currently edited by members of the Action.	At least 2 journal issues/2 volumes 5 workshop proceedings (one by industry) Estimated audience: 5,000 people

2.	*Stakeholder briefs* summarizing the ongoing research conclusions and proposing innovative approaches to evidence based policy-making and practice, published online and distributed among participants of the local stakeholder talks.	11 stakeholders briefs Estimated audience: 3000 people
3.	*Local stakeholder talks*: A series of EMPOWER-SE talks in all the countries aimed at policy-makers and practitioners in collaboration with the two international industry representatives.	One per country Estimated audience: 100 people per talk
4.	*Two conferences*. These will be mainly of an academic nature, aimed at sharing the results linked to research coordination goals. Each conference will include one workshop targeted at policy-makers focusing on the contribution of the knowledge generated within the Action to policy-making.	2 International conferences Estimated audience: 300 people per conference
5.	*Podcasts*: A podcast series composed (at least one episode per WG.) The series will be in English although the DB will be encouraged to provide subtitles in their languages.	At least 3 podcasts Estimated audience: 1000 people
6.	*Website, blog and news alert*: A website that includes information about the Action goals, members, actions and results. Pieces based on findings will feature several categories of content (research overviews, summaries of events and personal experiences from the point of view of researchers, examples of concrete SE, etc.) and will be written in plain-language. Every new update in the website or the blog will be included in a monthly news alert summarizing all the activity.	Estimated audience: 15000 people
7.	*Social media presence*: The social media will also be used by aligning personal and institutional accounts from members with a social media site that will facilitate individual posts and interactions. Every new update in the website or the blog as well as any news piece by any of the members will be circulated via Twitter, ResearchGate and Facebook.	Estimated audience: 3000 people
8.	*Flyers:* Electronic and physical versions of a flyer featuring the Action will be produced, taking into account design principles to maximize its visual impact and information goals.	1000 printed flyers Estimated audience: 2000 people
9.	*A facilitation plan*: At the end of the Action, a facilitation plan that summarizes the process, the activities and the results of the Action will be published online for interested communities to adapt it with a view on maintaining this initial networking effort beyond the duration of the COST funding.	Estimated audience: 50 people

The interaction with policy-makers and practitioners within the Action will result in a 'community of practice' that includes the academic, policy and practice perspectives. Such a community will connect relevant stakeholders against a backdrop of shared research results, particularly in peripheral countries with a nascent SE community. It will facilitate and encourage a comparison of views between Near Neighbour Countries while providing pathways for making SEs more relevant for European societies. The unit in charge of dissemination within EMPOWER-SE will make sure that all the dissemination deliverables are produced and will act as an information hub, turning some of it into newsworthy and shareable material.

A powerful multiplying effect will be created via many SE networks existing (or under development) in various countries covered in the Action, plus all the most relevant European ones, particularly via the two industry representatives. The former gathers European organisations and national umbrella organizations representing cooperatives, mutual, associations, foundations, and social enterprises; while the latter has a presence in 35 countries, including 12 European countries (Austria, Belgium, France, Germany, Greece, Ireland, Italy, Netherlands, Poland, Portugal, Spain, and UK) plus the Scandinavian region. Some important examples are presented below:

Country	Networks
Belgium	SAW-B (umbrella for the social economy) Febecoop (umbrella for cooperatives)
Denmark	National Committee on Social Enterprise

France	Social and Solidarity Economy France Movement of Social Entrepreneurs (MOUVES)
Greece	Greek Social Entrepreneurship Forum Network of Social Cooperative Enterprises Central Macedonia
Germany	Federal Association of Non-statutory Welfare (BAGFW)
Hungary	Civil Support Non-profit Kft.
Spain	Spanish Business Confederation of Social Economy (CEPES) Socialemprende (Spanish Association of Social Entrepreneurs)
Italy	Alleanza delle Cooperative Italiane (ACI sociali) CGM
Poland	National Audit Association of Social Cooperatives (FISE)
UK	Social Enterprise UK

The DB will provide assistance to national representatives in how to strengthen communication with the networks and their members throughout the duration of the Action feeding them with information and sharing news on an ongoing basis about what is happening in other countries.

C) POTENTIAL FOR INNOVATION VERSUS RISK LEVEL

I) POTENTIAL FOR SCIENTIFIC, TECHNOLOGICAL AND/OR SOCIOECONOMIC INNOVATION BREAKTHROUGHS

As detailed in sections 1.C.II and 1.C.III, the Action fosters a comprehensive scientific understanding of the variety of SE conceptions and models as well as the institutional factors and organizational choices shaping these models and their contexts in specific industries.

By co-ordinating research efforts between researchers from more than 38 countries, the Action holds considerable potential for pushing forward the research in addition to contributing to the well-being of European society through promoting more effective policy-making and greater public knowledge about this topic. SEs are understood increasingly as vehicles for social innovation that can deliver in a participative and efficient way, smart, inclusive, and sustainable solutions in crucial areas such as migration, health and ageing, social finance and ecological transition.

The risk level is minimal as the Action includes the main acknowledged scientific experts in the field and has been prepared in close consultation with relevant stakeholders: more than 60 persons already accepted to be part of the Action. An element of risk at the same time is represented by the diversity of the Action Proposers who have varied experiences, and socio-political and educational systems and cultures in their countries, and have had little opportunity to interact. In this context, the Action will offer concrete entry points to co-create future research proposals, articles, exchanges, etc. and to strengthen the ties with policy-makers and practitioners in various industries.

3) IMPLEMENTATION

A) DESCRIPTION OF THE WORK PLAN

I) DESCRIPTION OF WORKING GROUPS

The Action is organized in a flexible four-year work plan around four working groups (WGs) each of them with specific tasks and deliverables. WG objectives are derived directly from both the research questions of the challenge (see 1.1.1), the research coordination objectives (see 1.2.1) and the capacity – building objectives (1.2.2).

| WG1	FOUNDATIONS
Duration	M1-M24
Objective	To identify and bind the variety of SE conceptions and models at the local level.

Tasks	- Summarizing, for each country, the contextual and conceptual issues surrounding SE (academic spheres, policy makers and civil society). - Identifying the different research fields which, in different countries, can connect with SE studies (e.g. economics and business, organizational studies, sociology, political sciences, etc.). - Identifying and characterizing various sets of SEs (fields of activity, social mission, public or private supports, operational and governance models etc.). - Developing a typology of SEs by identifying major distinct "models" in the SE landscape in an international perspective.
Activities	2 WG scientific seminars per year
Milestone	Biannual review by the Core Group (CG)
Deliverables	- Two special journal issues and two books focused on specific regions (3 scientific journals and one publisher have been already identified in the ongoing series currently edited by members of the Action). - Panel sessions at conferences (International Society for Third Sector Research; International Social Innovation Research Conference; European Group for Public Administration Conference; EMES International Research Conference on Social Enterprise; etc.). - Four stakeholders briefs (one for each publication). - Two training sessions for two Training Schools

| WG2	INDUSTRIES & IMPACT
Duration	M12-M48
Objective	To gather evidence and analyse the innovative contributions of SEs in 5 key industries for the development of sustainable societies.
Tasks	- Bringing together the key scholars in the SE field for each of the 5 key industries identified: migration, renewable energy and transport, health and social care, food supply chains, social finance, circular economy etc., based on an open call for participation and a transparent process of selection. - Organizing the meetings of the WG according to these fields. - Collecting evidence and analysing the innovative contribution of SEs in an international perspective.
Activities	2 WG scientific seminars per year
Milestones	Biannual review by the CG
Deliverables	- Proceedings of each workshop gathering the best papers. - Panel sessions at conferences (*see suggested conferences above*). - Five "stakeholders briefs", one per industry analysed.

WG3	ECO-SYSTEMS
Duration	M24-M48
Objective	To equip major SE stakeholders with robust knowledge to understand how the different elements that compose the eco-system of SEs in each country interact and can have an impact on the scaling of SEs, both wide and deep.
Tasks	- Defining the components of the SE eco-system (e.g. the political acknowledgment and legal forms; access to market; the public support –for start-up and scaling up, and the fiscal framework- access to finance; networks and mutual support mechanisms; research and education). - Analysing how the ecosystem of SE is shaped in selected countries, whether all the above-mentioned components are present, whether additional components exist in specific countries and what role is played by each component. - Developing recommendations addressed to both EU institutions and individual countries – including national and local public authorities – with a view to supporting SE further development and scaling up.
Activities	2 WG scientific seminars per year
Milestones	Biannual review by the CG
Deliverables	- Two "stakeholders briefs" consisting of a general analysis on the SE eco-system and one comparing eco-systems across geographic regions. - Two training sessions for two Training Schools

WG4	EDUCATION AND DISSEMINATION
Duration	M1-M48
Objective	To produce concrete outputs for SE research community and to ensure the maximum impact of the Action in terms of transfer knowledge and awareness among stakeholders during and beyond the Action duration.
Tasks	- Organising transversal events (two Training Schools, two conferences, STSMs). - Ensuring an Internet presence of the Action's activities and results by maintaining the Action web page; producing news alerts to the Action distribution list; and ensuring the Action community management in the social media. - Take the lead in facilitating the development of new research projects. The Core Group will encourage collaborative writing of funding applications among members by setting up ad hoc sessions during the WGs
Activities	The DB will prepare a proposal detailing the management of all the tasks (calendar, place, members in charge…) to be approved by the Management Committee.
Milestones	Biannual review by the DB.
Deliverables	- Two Training Schools - Two international conferences - Two policy workshops (one within each of the two conferences) - At least 15 Short-Term Scientific Missions.- A flyer about the Action in paper and electronic version.- A podcast series.- A web page embedded in the page of one of the Action including a website and presence in the social media- A facilitation plan to expand the impact of the Action beyond its duration.

II) GANTT DIAGRAM
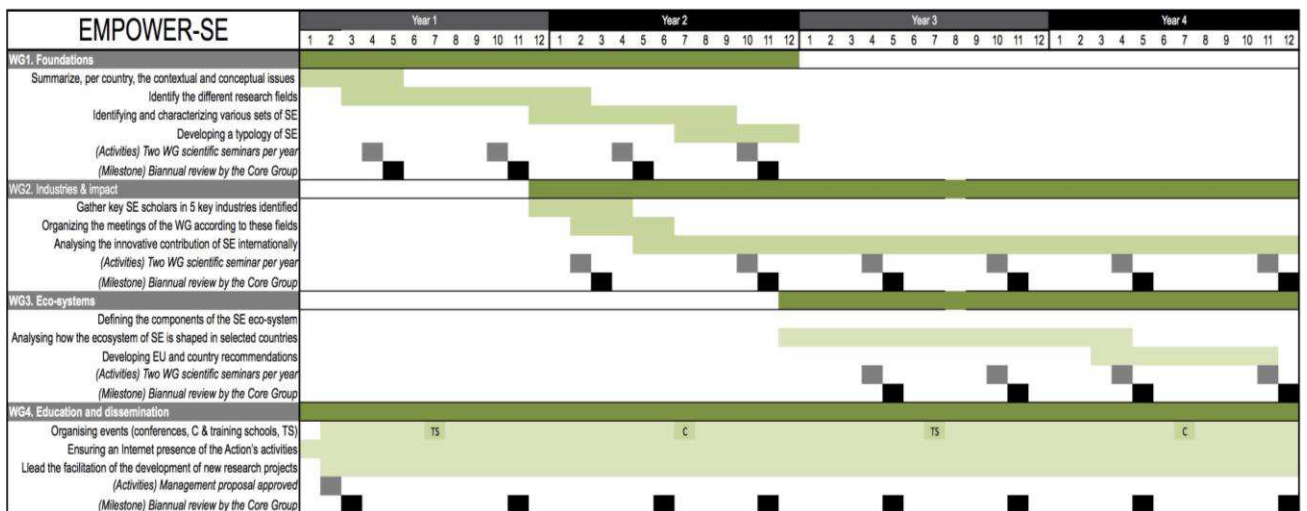
III) PERT CHART
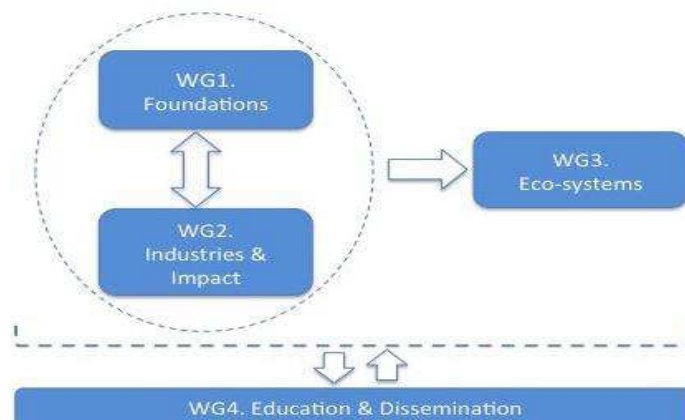
Identified risks will be discussed by the CG, which will decide on the urgency of the issue and propose a contingency plan. With regard to the work plan of the Action several risks exist whether they are related to the research (quality and coherence); network (diversity and participation); or Action management perspective.

	Risk	Contingency plan
Research-related	Complexity in articulating the WGs.	Careful planning and inter-WG discussion will take place in the CG.
Research-related	Lack of understanding between different traditions or disciplines.	Membership composition reflects the strengths of the various researchers as well as the potential for cross-fertilization.
Research-related	Low quality outputs.	Detailed feedback and a request to revise the output will be sent to the involved partner. A peer partner involved in a similar task will be invited to accompany the revision process to enhance learning. Should s/he fail to deliver, then s/he will not be invited to future activities of the Action and the CG will take responsibility for delivering it.
Network diversity	Low participation from researchers in countries characterised by an underdeveloped SE tradition	Given the response to the invitation to participate in the Action, the likelihood of this risk is very low. Should this happen in specific countries, the Action will mobilize researchers in Near Neighbour Countries to contact potential researchers to encourage them to participate.
Network diversity	Low participation from stakeholders.	The proposed network already involves a wide spectrum of partners. Both researchers and industry representatives will coordinate to contact stakeholders to participate to conferences, local stakeholders talks and Training Schools.
Action management	Low quality deliverables.	This Action combines a mix between experienced researchers and early-stage researchers in the SE field. They will work in partnership. Should this problem appear, the responsible participant will be asked to improve the deliverable and if needed the help of a more experienced researcher will be asked to improve the quality of the deliverable.
Action management	Delay in the production of deliverables.	The experienced coordination team behind the Action will ensure that deadlines are respected. This is a key responsibility of the CG. Should unacceptable delays occur, a substitute within the Action will be assigned to the particular task.
	Conflict resolution.	Should a conflict emerge among two or more partners, the CG will address it immediately trying to mediate to find an amicable solution. In case the conflict persists, a crisis committee formed by representatives from the parties and the CG plus an external expert will be put together until a solution is reached.

B) MANAGEMENT STRUCTURES AND PROCEDURES

A well-defined decision-making process and a pragmatic approach to the management of the Action will ensure that well-informed and goal-oriented decisions can be taken at all stages. Three bodies will be in charge:

1. The Management Committee (MC) is composed of the Action Chair and Vice-Chair plus up to two representatives of each Member Countries having accepted the Memorandum of Understanding of the Action. It will meet once a year, ideally during the four main events organized by EMPOWER-SE (two Training Schools and two conferences). Its main task is to oversee the coordination, implementation and management of the Action activities as well as the financial management of the grant.

2. The Core group (CG) is composed of the Action Chair and Vice-Chair, responsible for coordinating the MC; the WG leaders; the Grant Holder and the dissemination leader. This is the key body to ensure that the correct decisions to meet the objectives of the Action are taken. They will meet at least twice a year and will review the different milestones of the different WGs. The Action will develop an inclusiveness plan that is updated every time that the CG meets with a view to implementing a successful strategy to attract SE researchers and stakeholders.

3. The Dissemination Board (DB). The DB is responsible for ensuring that all the activities planned to increase the visibility, outreach and impact of the Action are delivered in a timely manner. It is composed of the Action Chair, a dissemination official and team members devoted to website maintenance, community managements, editorial and scripting tasks.

C) NETWORK AS A WHOLE

This Action rests on the initiative of a network of established scholars in the SE field that have spearheaded the widening of SEs as an inquiry field and as a community of researchers. However, this potentially leading position to take the field to the next level will remain limited in geographic and scientific scope without the support of COST. The proposed breakthroughs in terms of conceptual clarification, epistemological enrichment and shared understandings with policy-makers and practitioners can only be achieved if the diversity of socioeconomic and geographic contexts as well as epistemological traditions are covered. New institutional contexts will be brought into the analysis paving the way to research, policy and practice interactions with those countries in future research proposals.

Therefore, the aim of this Action is to extend the SE community, well beyond this existing network, to all peripheral countries and to young researchers with a specific attention to the less research-intensive countries across the COST Member Countries. This Action includes, at proposal stage, 30 COST Countries from which over 40% represent COST Inclusiveness target countries. 4 NNC Institutions and 3 IPC Institutions will also join the Action. Therefore, the scope of this Action has never been attempted before: indeed, the strength of this Action relies on the interaction between leading scholars with early-stage researchers and countries with a limited research tradition in the SE field.

Such an Action is extremely ambitious requiring the right combination of expertise, experience and centralized coordination on the one hand, and newness, untainted regards, and bottom-up initiatives, on the other hand. This is why the proposed Action ensures that the right number of representatives from the various geographic areas representing a priori distinctive traditions (many of them still unexplored) are included.

Lastly, the industry representatives participating in the Action have never before come together into a joint effort as they represent opposing views of the sector. Bringing them together to work toward the achievement of shared objectives will set a "before and after" of SEs in the history of COST countries while opening countless avenues for further research on SEs.

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