

Measuring Social Economy in Public Statistics: Introduction to the Polish Experience

Agnieszka Pacut

Abstract: This article presents the objectives, scope, and evolution of the research on social economy conducted by the Research Centre for Social Economy at the Statistical Office in Krakow (Statistics Poland). It highlights the experience and achievements of public statistics in Poland in surveying social economy entities, including social enterprises.

Keywords: social economy, social enterprise, public statistics, Poland, quantitative data

JEL codes: C1, C46

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Social economy is a component of socioeconomic practice that has garnered the interest of academia and public sector worldwide for many years due to its considerable promise in addressing the integrated economic, social, and environmental approaches of sustainable development (Compère et al., 2021). It highlights the social dimensions of development (Hujo & Braumann, 2016) and offers tools that can contribute to transformations toward equity and sustainability (Chaves & Monzón, 2012; UNRISD, 2015).

Various efforts take place at the international level to increase the visibility and effectiveness of social economy. One of these is the implementation of the “Opportunities and Challenges of Statistics on Social and Solidarity Economy (SSE)” project by the United Nations Research Institute for Social Development (Compère et al., 2021). This project presents the state of the art of SSE statistics (Bouchard & Salathé-Beaulieu, 2021), maps international experiences in social economy research (Compère et al., 2021), and makes improvement recommendations for policy makers (Chaves-Avila, 2021). Previous studies present the data collection methods, approaches used, advantages, and disadvantages of surveys conducted by various data providers on social economy – including national statistical offices, government departments and agencies, social and solidarity economy representative organizations (umbrella), universities and other research centers, development agencies, and other non-state entities promoting the SSE (Bouchard & Salathé-Beaulieu, 2021). At the same time, they highlight the importance of public statistics and the challenges it faces in providing the data necessary for programming public policies dedicated to the development of social economy. In particular, this shows the

importance of research, knowledge, and data for social economy development, public policy creation, and concept legitimacy.

The above serves as the background for presenting the experience and achievements of Statistics Poland in measuring social economy, as one of the Central and Eastern European countries that has been systematically developing research in this area since the 1990s.

Statistics Poland (Polish: Główny Urząd Statystyczny, GUS) began surveying nonprofit organizations – foundations, associations, and other social organizations – in Poland in 1998. Subsequent editions of the survey, conducted in 1999, 2002, and 2006, did not receive wide publicity, but they were the starting point for the office's involvement in the Equal Community Initiative program 2004–2006. As a result of the program, Social Surveys Statistics Poland developed a detailed description of the survey methodology concerning associations, foundations, business and professional associations, and faith-based charities. In 2009, the Research Centre for Social Economy (Polish: Ośrodek Badania Gospodarki Społecznej) was established as a separate unit of the Statistical Office in Krakow (GUS, 2019). The purpose of this unit is to: 1) provide reliable information characterizing social economy entities, 2) identify their economic and social potential and the scale and conditions of their activities, and 3) provide comparable data in subsequent time series (Szlubowska & Sekuła, 2024).

The legal basis for the survey of associations, foundations, business and professional associations, and faith-based charities is the Act of June 29, 1995 on public statistics and the Ordinance of the Council of Ministers on the Statistical Surveys Program for Public Statistics, issued annually and determining the subject and object scope of the surveys, as well as the types, forms, and deadlines for making the resulting statistical information available.

The purpose of this survey is to provide information characterizing selected types of nonprofit organizations, determine their economic and social potential, and indicate the scale and conditions of the conducted activity. The information elaborated is used to prepare the account of the nonprofit institutions sector distinguished within national accounts, and to monitor indicators in the field of, among others, social capital, social economy, and implementation of the law on public benefit activities and volunteering (GUS, 2019) and the Act of August 5, 2022 on the social economy (Małecka-Lyszczek et al., 2023).

In the study of nonprofit organizations, the Statistics Poland relies on the international statistical definition of nonprofit organizations as recommended by the United Nations (UN, 2003). According to this definition, the nonprofit sector includes entities which are formalized, sustainable, institutionally separate from public administration, not profit-oriented, self-governing, and characterized by voluntary participation in the organization's activities.

As part of the survey of associations, foundations, business and professional associations, and faith-based charities, the reporting obligation covers the following subsequent types of entities: 1) nonprofit organizations – foundations, associations, and similar social organizations; 2) faith-based charities – organizational units of the Catholic Church and other churches and religious associations whose activities were social; and 3) business and professional associations. Over time, Statistics Poland has also included other entities in the survey, such as: 1) socio-occupational reintegration units, namely social integration centers, social integration clubs, occupational therapy workshops, and vocational activity establishments, referred to in the literature as Work Integration Social Enterprise – WISE (Pizarro Escribano & Miranda González, 2022; Rey-Martí et al., 2021); and 2) cooperative organizations, namely employee cooperatives, social cooperatives, and cooperatives of disabled persons and blind persons. In addition, the

survey includes unpaid work outside the household (voluntary work). Thus, the study covers the entire group of entities classified by the legislator as the social economy sector in Poland.

The subject matter includes such issues as the scope, areas, and forms of activity, membership, activity recipients, members, social work (volunteers), paid work, financial aspects of activity, management, form and level of cooperation with the public sector, commercial and other nonprofit organizations, types of exemptions and privileges applied by organizations with public benefit status, and others. The scope of data collected varies according to the type of entity. For a detailed discussion of research tools and indicators, see *Methodological report. Non-profit organizations: Associations, foundations, business and professional associations and faith-based charities* (GUS, 2019).

Surveys of the above-mentioned group of entities employ statistical forms filled in by the organizations covered by the reporting obligation. In addition, the survey compiles data obtained from administrative and non-administrative sources – that is, the Social Insurance Institution (Polish: Zakład Ubezpieczeń Społecznych, ZUS), the Ministry of Finance, the State Fund for the Rehabilitation of Persons with Disabilities (Polish: Państwowy Fundusz Rehabilitacji Osób Niepełnosprawnych, PFRON), and Country Offices. The survey uses several forms of reports, depending on the entity type and the subject matter scope. The selection of units for reporting follows two methods: full and representative (GUS, 2019).

The survey data are presented as reports available on the website, statistical tables (GUS, 2024), and a local database (GUS, 2024a). Moreover, the Ministry of Labor and Social Policy also publishes the data on social economy from Statistics Poland's surveys (DES, 2021).

Social economy research is an important element among the tasks of the Statistical Office in Krakow. The implementation of public policies aimed at strengthening social economy entities generates information needs, which the office tries to satisfy by extending the subject and object scope of research. The challenges for social economy research identified by Statistics Poland include increasing the quality of the research work carried out, debriefing respondents, and disseminating research results to stakeholders.

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Conflict of Interest

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