

DESIGNING STRATEGY FOR THE DEVELOPMENT OF SOCIAL/SOLIDARITY ECONOMY

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Abstract

It is essential to have a strategic approach to develop social / solidarity economy as being a part of local economy. This approach should cover the identification of specific local problems, needs, requirements and resources, as well as the definition of peculiar objectives, activities, methods and tools associated with them. It should also set out the pathways to achieve the goals, provide alternatives, as well as ensure meeting the criteria of sustainability. The goals to be achieved and the activities and tasks related to the realization of the goals are carried out by the actors in partnership. The absence of careful planning, preparation and experienced management, as well as the lack of partnership based on effective communication, common interest and cooperation can undermine the feasibility of the strategy.

Strategic planning must include negotiations of interests with all participating parties and also community development. If the citizens are successfully addressed and involved in the phases of planning, preparation and implementation the strategy will be realized more effectively and successfully. If, on the other hand, the processes and events are not in accordance with the goals, or the actions can be associated with only a limited number of actors, it obviously reduces the overall effectivity. In this case the intensity and extent of the expected impacts, as well as the social acceptance of development initiatives also become lower.

The design and implementation of local economy development strategy is primarily the task of local communities and not local governments. As social economy development strategy has to be planned within the framework of local economy development strategy, it is also their responsibility. Accordingly, the methods and tools of community development play an important role in the steps of strategy development and implementation. Consequently, the planning and implementation of a development strategy for a local resource based social economy must be approached from several points of view at the same time. Economic, social, cultural and environmental aspects must be taken into account in order to meet the sustainability criteria.

Keywords: local economy, local community, social economy, strategic view, strategic creation, negotiations of interests, developing communities, sustainability

Strategic planning of the social economy to be created as part of the local economy

The design and implementation of an economic development strategy is an essential element of local economic development (LED). Similarly, in the case of local economy-related social / solidarity economic development (SED) it is also expedient to conduct strategic planning, based on which social economy can be developed as an integral part of the local economy at different stages of implementation. The most important tasks to launch the strategic planning of LED and SED are getting in

contact with local actors, selecting key people and involving them in the development process, as well as building trust with locals.

First it is essential to provide the basis of cooperation with locals, then the assessment of actual local needs and requirements can be carried out. Putting deficiency symptoms and bottlenecks, as well as economic, social and environmental aspects in the appropriate context (to conduct a situation analysis) is the prerequisite of defining problems and dilemmas and determining the range of stakeholders.

Sharing the same problems, dilemmas and deficiencies can be a ground for defining common interests and promoting involvement. These can be the basis of goals and activities which require the use and allocation of local resources and capacities in community actions.

Strategic creation starts with organizing community actions (which emerge from common goals) into a complementary system of content and logical structure (Juhász, 2006).

It is important to note that LED strategies – and also the incorporated SED strategies – should reflect specific values and attitudes that are characteristic of the local community, and should be organized in an autonomous and spontaneous way. The bottom-up organization of strategy creation and implementation may be expedient in local developments. They must rely on current, and relevant problems, needs and resources. When plotting the future state we want to achieve it is necessary to start from local conditions which we compare with the desired future economic, social and environmental situation of the settlement and the local community. Strategic goals are declared during the strategic planning and the various development projects and programs based on it. These are created with the aim to respond to problems and deficiencies of the settlement and the local community. We also set up activities, tasks, resources, capacities, deadlines, and responsibilities within a given time frame.

The strategic planning of LED – and its integral part SED – can be described as a process, which is based on the dynamic concept of “change”. The planning and preparation phases as well as the implementation and sustainment phases are repeated from project to project, they are interrelated and are constantly revised. The preparation of the new strategy already begins in the implementing phase, since changes can occur at any time in the target system and even when carrying out tasks due to newly arising problems, deficiencies and bottlenecks. In addition, some previous relevant and current issues and problems may disappear (Juhász, 2006).

Contacting local actors, building a relationship of trust with the local population

The design of social economic development (SED) that belongs to local economic development (LED) is most often forced by external factors in Hungary. This can be either compliance with legal obligations or a precondition for obtaining an external source of funding. Although, based on the theoretical considerations of LED and its associated SED, it is not necessary to adapt to such external pressure, yet it appears that in most cases, these factors motivate the design of local development strategies.

One of the most important preconditions of the success of development initiatives at the municipal and regional level is establishing contact with local actors. During this process the representatives of the development initiative try to draw the attention of the local population to the fact that the development of the

local economy is a common interest for which, together, the residents themselves can do a lot. Without this contact, the community cannot be encouraged to think and act together. A strategy developed with the involvement of local actors must take local values and attitudes of the local community into account, in line with the development goals and tools to be declared. (Czene, Ritz; 2010). “Bottom-up” initiatives may enable a municipality to establish its own development strategy in awareness of its own situation, potentials and capabilities, albeit with external assistance. The success of these grassroots programs lies in the extent to which local stakeholders are involved. It also depends on the success of a long-term partnership that can ensure the permanent sustainability of the results and impacts achieved, not only from planning to the professional and financial completion, but also beyond. An essential part of the “bottom up” development dynamics is the mapping and coordination of the relations and effects of the individual actors and programs. Improving the operation and strategies of individual businesses, strengthening the quality of the local business environment is part of the “bottom-up” economic development (Csete, 2012).

The basis of local development is therefore the involvement and dynamisation of the local society, the creation of a common interest, the allocation of local resources in order to enforce common local interests. During the planning and implementation of the local economic development strategy, local actors, in cooperation with external experts, carry out activities in line with local conditions and expectations. In this process they adapt to the external environmental conditions, preserving local values and traditions and resources (Czene, Ritz; 2010).

Involving local actors in development processes is indispensable for several reasons. Networking is an important tool of increasing credibility, justice, fairness and transparency as this makes the design process public. In addition, it contributes to increasing the confidence of local actors in the process, as they can be constantly informed and kept involved in making decisions. Involvement can also increase efficiency, as it makes it easier to understand real needs, to adopt a strategy and the actions and interventions that take place within it, and to further reduce stakeholder resistance and mistrust (Swinburn, Goga, Murphy, 2004).

In addition to involving local actors in local development, the formation of attitudes is also crucial. Without the commitment, enthusiasm, conscious behaviour and active participation of local actors, it is not possible to revitalize the local economy and flourish in a sustainable way. It is also important to develop a supportive attitude from the beginning. Accordingly, special emphasis is placed on activities aimed at creating conscious shopping and consuming habits, which contribute to the creation of local markets for locally produced products. In addition, it is particularly important that local governments, local entrepreneurs and other actors strengthen local identities, prioritize local resources, products, services and local knowledge. This issue also includes the improvement of the entrepreneurial spirit and willingness, the motivation of the establishment of entrepreneurial communities, as not only the material factors, infrastructure and knowledge are essential elements in their establishment, but also the approach itself. It is also helpful if there is recognition for the work done in the society of the settlement. Community development is also a basic factor, which promotes the development of solidarity and cooperation skills, dynamizing the functioning of local relations, and also the development and sustainability of trust relations between actors (Czene, Ritz; 2010). Establishing a relationship with local actors and gaining their trust starts at the beginning, but it is a task that must be maintained

throughout the entire process. The actors must work on this continuously since this is one of the factors that guarantee the implementation of local developments.

Selection and involvement of key actors in the development process

One of the essential steps of local development initiatives is to identify the key actors, discover and plan the way and intensity of their contribution (knowledge, experience, volunteer work, provision of financial or other resources). The identification of key actors can cover a wider spectrum: the involvement of local governments and market actors, as well as civil organizations and the local population in the planning and implementation of local development is a widespread method worldwide. Building partnerships between key players will allow actors to achieve more with the same investment and implement new methods. It also enables them to work more cost-effectively to access resources and develop the local economy and society. The aim of building the partnership is to bring together local actors who have an impact on the development of the local economy and society and to create a common agenda that promotes and sustains successful and long-term development. The partnership should be a mutually recognized opportunity for the participants, so that the implementation is characterized by openness and innovation (Swinburn, Goga, Murphy, 2004). The established clusters can serve as a framework for networking, which may be suitable for improving the competitiveness of a region in global competition without decrease of local employment rate. The aim of establishing clusters is to bring together companies of a region – which can be either rivals or cooperate with each other – and help them realize that their cooperation can be beneficial for all of them. They must be convinced that rivalling companies from other regions and countries can be a real threat to them, and not competitors from the same area (Csete, 2012).

Thus, in addition to local governments, local businesses and non-governmental organizations, as well as the local population, are key actors in local economic and social development.

The actors can represent and enforce their aspects and interests successfully if they are open to the establishment of partnerships from the very beginning of the process. Therefore, it may be reasonable to set up a local development committee or working group, which should be able to manage and promote the partnership-related elements of the strategy throughout the process. It is important that all stakeholders must be represented in the working group and none of them can play a dominant role. Optimally, the working group should include representatives of all actors of the local economy and social development: the local government sector (representatives of local government management and economic institutions), local business actors: enterprises and their organizations (chambers, professional bodies, associations), representatives of knowledge transfer institutions (secondary and higher education institutions, vocational training, retraining), development agencies (governmental and business agencies) as well as local non-governmental organizations (Bajmócy, 2011). The significance of the working group depends on how successfully it can reach and involve a wide range of actors in the later stages of planning and implementation of the strategy, therefore it is expedient to invite key influential people with a wide network of contacts.

Situation analysis, assessment of local needs and requirements

One of the most important prerequisites of economic and social planning and strategy design is to have a sufficient amount and quality of usable data on the problems, needs and requirements of the given area, locality and local target groups. Effective planning requires knowledge of the current situation of the local economy and society, as well as the needs and demands arising from it. These can be discovered in several steps, the primary aim is to gather information on the basis of which, after a proper systematization, strategic development directions leading to the desired future conditions can be developed (Bajmócy, 2011). Situation exploration and needs assessment can be defined as a complex, multi-step process.

During the planning it should be clarified what situation analysis and needs assessment should focus on (do we have a pre-formulated assumption, for example), and also who do we want to reach (members of the target group, other institutions represented by the target group, potential collaborators). It is also important to define the data and information we want to get and also the methods and the sources from where we want to access them (Kőnig, 2011).

Different actors may have different perception of the problems therefore it is important that the stakeholders have an insight and influence on the situation assessment process. Thus, the situation assessment should take place in parallel with (or right after) the identification of the actors to be involved. The situation assessment can cover many factors and processes, as economic and social processes are not isolated phenomena, they always include aspects of additional issues from their environment. Therefore, it is useful to compare the results and recommendations of those situation surveys which focus specifically on economic and social aspects, with analyses from other perspectives as well. In addition, even different conclusions can be drawn from the same situation analysis. Consideration of the different aspects, the decision between possible arguments and counter-arguments is not the sole competence of the experts carrying out the analysis, but may require actual community consideration and decision (Bajmócy, 2011).

One of the basic planning and implementation tools of strategy creation is the logframe method, the careful application of which can be a guarantee for the implementation of projects and ensuring their sustainability. The logframe consists of two phases: problem analysis, definition of objectives, and strategy analysis belong to the analysis phase, while the preparation of the logical framework matrix belongs to the planning phase.

The analysis phase involves mapping the situation of the target group aimed by the project and the different aspects of the given social problem. As a result of the situation survey, we will hopefully have a very large set of information in our possession, which in this form is not yet suitable for the preparation of the target. It is therefore necessary to condense and systematize the information obtained during the situation survey. The first step of the analysis is to summarize the strengths and weaknesses of the external system of conditions, to break down the problem to be analysed into components. For this purpose we can use SWOT analysis, which is a commonly used, popular method adapted from corporate practice and looks back on nearly half a century of use.

This allows us to organize complex ideas into a simple, clearly structured table. The procedure is built on a simple logic and it is excellent for identifying the right directions for the strategy, since it presents a balanced mapping of pros and cons. The analysis is a snapshot displayed in a simple structure, which clearly shows

the state of the studied phenomenon in a table, divided into four parts. The top row contains a list of Strengths and Weaknesses, while the bottom row is a list of Opportunities and Threats. The aspects in the top row contain the internal criteria for the examined organization, while the bottom row contains the results of the examination of the wider environment.

In the analysis we divide the external and internal factors of development into four distinct groups.

- Strengths: all the positive internal factors that function properly and can be influenced by us (simply put: in which we are better than others)
- Weaknesses: all the negative internal factors that do not function well but can be influenced to improve the situation (simply put: in which we are worse than others)
- Opportunities: all the positive external, favourable conditions, which, although they cannot be influenced, can be used to build on the strengths.
- Threats: all the negative externalities and limitations that cannot be influenced and reduce the chances of success can pose a risk. (Bajmócy, 2011)

Problem analysis is the next step in the analysis phase. In order to be able to determine the details of the development strategy, we need to go deeper than the SWOT analysis, we also need to explore the reasons for the situation. Therefore we need to focus on weaknesses. This method can be used to create the problem tree, thus revealing the chain of problems, exploring their causal relationships. Each problem identified needs to be analysed and placed at one of the levels representing the hierarchical structure between the causes. We have to identify all the main and sub-problems, arrange them vertically according to the cause-and-effect relationship, this way we get a branch diagram of the problems, in which the causes are in the bottom rows and the effects are in the top rows. It can make our analysis easier if we write down the problems on labels and then arrange them under each other according to the causal relationships. The result of this method is a tree structure, which clearly outlines the causal relationships of the problems in the area (Dr. Andriska, 2004).

When creating a problem tree, the question arises as to how deeply it is worth discussing the problems. No exact regularity can be established regarding the number of levels, however, based on the examination of international and domestic strategic documents, it can be stated that a triple structure already provides meaningful information and can significantly support the establishment of the goal hierarchy. Obviously, it may be necessary to include many more levels, four to five, to break down overall strategic issues and map out options for intervention. Another methodological note is that the number of levels of the problem tree is not necessarily the same under all circumstances; some of the factors might be divided into only one or two levels, while others into three or five levels.

After finalizing the problem tree, goal formation begins, but in order to do this we must first create the target tree. Defining the goal is not a set of activities, but, while the problem tree shows the negative correlations of the current situation, the target tree describes a positive future state, which can help us to define the specific targets of the development activity. To properly prepare the target tree, all we have to do is put the negative correlations of problem tree into reverse then we get the positive result. Instead of applying the cause-and-effect system, the target tree represents the options of problem solving in a system of assets and results. The

way we define targets should be specific, measurable, and accurate. After that we can decide which part of the target tree we want to implement, select the target for which we will be able to work effectively. There is a definite relationship between the levels of targets: the goals of the first level are the most comprehensive, but the lower we go, the more detailed our targets will be. In order to avoid failures, we should transform only those elements of the problem tree into targets, which can be solved or at least ameliorated by the development.

If all the targets that belong to a goal on a certain level have already been achieved, we can move up to the next goal. It follows from the method that the quality of the problem tree determines the quality of the target tree, i.e., the potential inaccuracies of the problem tree remain. A poorly structured problem tree results in an inaccurate target tree, which can jeopardize the success of the whole economic development intervention.

The “success factors” obtained during the SWOT analysis, or the elements of the target tree, only form the basis, but in no way supersede the next step of strategic planning, the setting of goals. In addition, both methods can provide room for the subjectivity of the analysts: experts with different perspectives and different theoretical backgrounds would presumably create a different SWOT table or problem tree based on the same situation analysis. Therefore, a wide-ranging, open discussion of the results of the situation analysis is an important stage in the strategic process (Bajmócy, 2011).

There are several data collection techniques available for the assessment of community needs and it is extremely difficult to select the most appropriate measurement method for the given goal or for the specific target group. The methods that can be applied for the needs assessment are grouped according to whether they are primary or secondary method. Primary methods allow first-hand access to information obtained directly from stakeholders through direct channels. Secondary methods, though, only allow the analysis of the resources already available, the exclusive use of which can thus lead to errors in many cases. Primary methods include surveys (general population, subpopulation), various observations, interviews (individual, focus group) or questionnaires. The secondary methods include the analysis of indicators and statistics, the collection and analysis of literature sources, as well as document analysis. The advantage of the secondary methods is that they are relatively cheap, their disadvantage is that in the case of information from external sources, it is not known how the examined population or problem is defined by the creators of the sources we use. We can get reliable data if it is collectable, correct, complete, comparable and transparent.

Getting to know and assessing the real needs of the given settlement and community is a precondition of any well-founded planning and strategy-making process. This means not only registering quantifiable needs, nor is it a one-sided ‘survey’, but presupposes multi-stakeholder communication in which stakeholders and decision-makers are constantly exchanging information. Without being aware of real needs, their magnitude, as well as the strategy based on them, the use of resources will not work sufficiently. To put it simply, needs assessment is the collection and analysis of data and information, followed by conclusions. In practice, however, there are various situations that determine the purpose and function of needs assessment, as well as the content and methods. We can talk about needs assessment in two approaches: based on the first, needs assessment is a tool for establishing new development ideas, in which the main goal is to explore a specific area and get the information and data necessary for planning. Under the second

approach, needs assessment is a regularly recurring activity that is an integral part of the process of operation and development of the local economy and society, which we carry out, mostly annually, in order to have up-to-date information on relevant needs and expectations.

Identification of affected parties and stakeholders

The third and last step of the analysis phase is the strategy analysis, in other words the development of the strategy to achieve the development goals. The strategy includes a set of goals that can be integrated into a development process taking the time and the available resources into account. With the design of the strategy, the goals of the development become largely fixed, so by the end of the strategy analysis phase, our goal-oriented development process becomes precisely identifiable.

The local economy and social development directly or indirectly affects a wide range of local actors (and sometimes some actors in other areas). At the same time, during the strategy-making process, only a narrow circle of stakeholders is able to effectively represent its interests and significantly influence the processes. Therefore it is advisable to separate the two circles and call the former affected parties and the latter stakeholders.

In order to prepare the strategy properly, it is advisable to conduct a stakeholder analysis, as the basic precondition of all successful planning, programming and development is to take into account the persons, organizations, groups affected, who can influence it and whose interests the goals represent. The first step is to analyse the impact of the stakeholders on the planned project, and then to rank them, to define the success criteria and motivational factors of the given partnership. The definition of interest groups and the examination of their characteristics are especially important because these groups can influence the implementation of development with their expectations and objectives.

Interest groups are all organizations, institutions, individuals, including the public, private and civil spheres that are related to a given strategy. The forms of involvement of interest groups are different. Their main types: target group (to whom the activity is focused on), partners (with whom we carry out the activity together), decision-makers, funders, intermediary organizations, regulatory institutions (Dr. Kovács, 2004).

The affected parties need to be grouped according to how closely they are related to our activities. In this respect, we distinguish between primary, secondary and tertiary, (etc.) interest groups.

By creating a dialogue between stakeholders in the implementation of the strategy we can obtain their support for the development, the content of the intervention can be tailored to real needs, and the chances of development success in general can be increased. The task is to develop a strategic planning in which the actors have real opportunity to get involved in the processes, if they consider it important.

Reconciliation of interests, conflict management, development of common interests

The development of settlements and micro-regions requires a complex, multi-directional process. Micro-regional developments are primarily based on the

dynamization of endogenous (internal) resources, among which the human factor is of primary importance.

As Koivunen and Langén (2003) point out, the analysis of potential stakeholders assumes the following goals and tasks: mapping the social / economic resource base with regard to different actors; gathering information on the needs, requirements, expectations and goals of each actor; grouping and categorizing potential participants according to their specific goals, interests and resources also taking opportunities and limitations of their participation into account; identification of current and further possible conflicts between stakeholders, as well as connection points and opportunities for cooperation (Juhász, 2006).

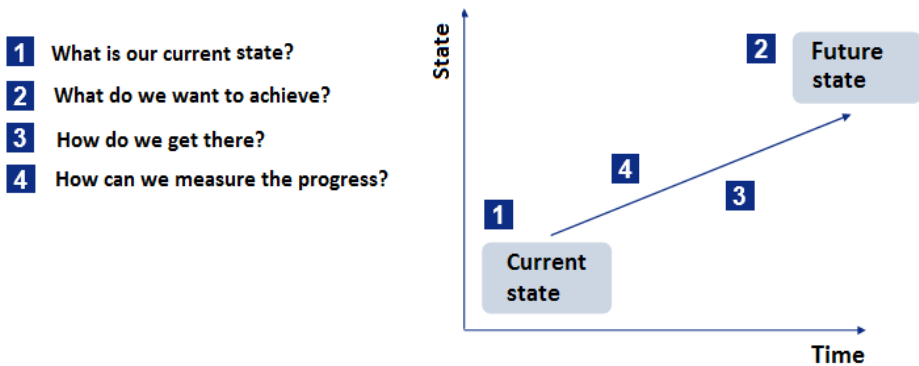
Along the various interests, there are many sources of conflict, focal points of confrontation, which in some respects dynamize the actions of individual actors, on the other hand, protracted and deepening conflicts consume some resources and create irreconcilable contradictions. In the case of communities, organizations, institutions and projects, these can result in the development of crisis situations. These have negative effect on the quality and nature of community ties, as well as group-, organizational and community level cohesion and also the quality of cooperation and related communication. In order to prevent and compensate for these crisis situations and to ensure the effectiveness of cooperation within the framework of micro-regions, it is necessary to explore various interests and conflicts and it is also essential to aggregate interests and manage conflicts. It is necessary to apply conflict management actions in order to promote the common interest of the parties. The aim of these conflict management actions is to increase the competitiveness and efficiency of the micro-region socially and economically by involving the various actors in development processes and making them interested. Promoting participation also entails the development of tools and opportunities for local decision-making and action (Juhász, 2006).

In each micro-region and municipality, networks of local governments, businesses, NGOs and other organizations of individuals represent the actors who may be subject to conflict management. Deciding which conflict management strategy can be effective depends primarily on how successfully the types of conflict between these actors can be identified. The identification of conflict types can be carried out by a modelling process based on the following questions. It is necessary to examine how and to what extent the parties of the conflicts are able to express and assert their specific interests. It is also important to clarify what enforcement mechanisms and related power mechanisms and structures influence the outcomes of conflicts in the micro-region. It is also important to examine the effectiveness and duration of the conflict management techniques in overcoming the problems and crises that arise and how constructive these conflict management strategies are. The factors determining the chances of participation need to be explored and also the extent of democratic participation in resolving conflict situations. In the exploration phase, therefore, it is worth focusing on what actors generate and complicate conflicts and finding out whether the outputs offer opportunities for a shift towards consensus. This process should also define the social and cultural factors that provide opportunities, but also set the limits for the use of conflict management techniques (Balogh, 2003). It is necessary to select the treatment method according to the above. The selection and elaboration of the conflict management tools to be used must also correspond to the starting points representing the social, economic and cultural characteristics of the given locality or micro-region.

Designing the strategy

The strategy describes the path between the current state and the target state, in other words it defines the series of activities that lead from the current state to the achievement of the desired future state. This approach is based on four elements: the current state, the future (target) state, the way to get there and the procedure for measuring progress.

Figure 1. Strategic approaches



Source: KPMG

We can use different approaches in the process of strategy creation, depending on where we start from and where we want (or can) get to, and what tools we choose. There are two distinct alternatives of strategic approach, the “Evolutionary Strategy” and the “Vision-Driven Strategy”.

Figure 2. Evolutionary and Vision-Driven strategy



Source: KPMG

The evolutionary strategy relies on a restricted basis. It is characterized by risk aversion as well as the enforcement of the traditional design approach. Strategy documents prepared on an evolutionary basis have an extensive situation analysis, which provides the basis for the completed plan. As a result of restrained ambitions,

the horizon of planning does not enter the so-called innovative sphere, thus leaving no room for ideas and intentions that would mean radical change. Accordingly, the principle of less risk - less return applies. By rejecting the use of innovative capacities, the overall effectiveness and efficiency of design is also reduced (Strategy Creation Handbook, 2009).

In the case of a vision-driven strategy, the basis of the approach lies in the well-developed target state (vision). Therefore a detailed and well-developed vision should be available as a starting point for planning that requires serious innovation capacities. The description of the path to the target state begins with the breakdown of the vision into sub-goals. This process sets up a possible alternative of the applicable strategic process starting up from the current state (Strategy Creation Handbook, 2009). The documentation of the strategy usually defines a complex set of goals. Its most common element is the vision, outlining the desired future situation of the region. The achievement of the vision is facilitated by the previously defined goals – the importance and difficulties of setting up these goals have already been discussed. The goal system itself is typically multi-level – includes the development of comprehensive goals and more specific targets. Properly identified goals basically provide answers to specific local problems, so they should be influenced mostly by the problems identified and summarized in the situation analysis, as well as the ideas of each local actor about the directions that are considered desirable. In practice, however, it is advisable (though not necessary) to consider additional aspects.

Monitoring and revision of strategy

Monitoring can be defined as the continuous tracking of the fulfilment of the goals defined during the planning of the strategy, in other words keeping track on the realization process. It is based on the quantification of previously set goals. The key to the monitoring activity is that current values of the previously defined indicators are continuously collected and analysed by the implementers of the interventions in order to receive a clear indication of the current status of the program and its parts on a regular basis. Although monitoring primarily involves continuous data collection and analysis, a broader interpretation of monitoring may also be relevant. This actually includes setting up and planning the monitoring system, defining the indicators, and then collecting and analysing the data during the implementation phase. It also involves proposing possible intervention in the program implementation process and, finally, decision-making as a management task at the end of the process.

An organization that supports the developments to be implemented, which can be the Commission of the European Union, a national government, but also a foundation or a private actor, devotes its resources to the given activity because its goals at least partially coincide with its own goals. That is why it is important for the supporting organization / person to have regular information about the progress of the program, as this will allow it to monitor the fulfilment of its own goals. Monitoring thus contributes to the most efficient use of the resources offered by the donor. As a result of continuous monitoring activities the person or organization responsible for the implementation of the improvements also receives information on the success of the project, or whether it is progressing in accordance with the goals. If not, monitoring will reveal the background to the failure and thus allow for intervention, modification in the implementation process of the program, helping

the overall effectiveness of program implementation. It follows, therefore, that monitoring is primarily an activity that supports management and promotes the effective and successful implementation of the program.

Monitoring, control, evaluation: these three tasks are usually mentioned together, although their role and function is different in the life cycle of development activities. While in the case of larger and more complex development programs the main implementing organization and its functional units, divisions can ensure the enforcement of all management activities, in the case of individual projects the different functions can be performed by the same units. However, in order to properly manage the life cycle of the development activity, it is important that the three activities appear separately as an individual and complete unit. In practice, a number of problems and difficulties, as well as imperfections in the implementation of interventions, can lead to inadequate differentiation of these activities or, as a consequence, to incomplete implementation.

In the implementation phase of the development cycle, monitoring the progress and measuring the stage of completion of the project has a key role. By regularly comparing the situation described in the plan with the actual situation and quantifying the differences, important information can be provided to decision-makers, who, based on this information, can make decisions to eliminate greater (exceeding tolerances limit) differences.

Summary

Social economy can be one of the special areas of the local economy, with activities and initiatives related to social solidarity, justice and fairness. The key actors in the local social / solidarity economy are non-governmental organizations and non-profit enterprises, which use profits for specific social purposes. The social / solidarity economy typically provides alternative employment opportunities and livelihoods for vulnerable groups in society, on the verge of social exclusion. These activities mostly require the active participation of the participants, voluntary work, and often mutual assistance. In addition to social enterprises employing disadvantaged workers, this includes community enterprises that emphasize community cohesion and goals, as well as cooperatives that improve the position of the self-employed by bringing the surplus of households beyond self-sufficiency to the market. The success of such initiatives cannot be measured solely in terms of economic performance, as they, in addition to the economic product, also play a very important role in social integration and value creation, transmission and preservation (self-help, individual responsibility, democracy, equality, justice, solidarity). Areas of a social economy with strong employment goals (including alternative or community employment) based on meeting local needs can be: providing employment opportunities through social (community) land programs; social and cultural services; landscape management; processing of agricultural and forestry products; handicrafts; tourism. Those interventions are also included which link social care to community employment (local employment in home help, child custody or childcare) or the promotion of activities that can be covered by community service work.

The natural, environmental, economic, social and human resources of the settlement and the micro-region must be taken into account simultaneously in the planning and implementation of social / solidarity economy developments that come to the fore as part of the local economy. In order to achieve the jointly

formulated goals, conditions must be provided that can guarantee in the long run the improvement of the living conditions of the population and the improvement of the population retention capacity of the region and the settlements. Therefore, special interventions are needed, which, based on self-organization, reveal local needs, requirements, motivations and interests, are able to mobilize and integrate the available resources and capacities (Juhász, 2006).

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A SZOCIÁLIS / SZOLIDÁRIS GAZDASÁG FEJLESZTÉSÉRE IRÁNYULÓ STRATÉGIA KIALAKÍTÁSA

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A szociális / szolidáris gazdaság helyi gazdaság részeként történő fejlesztése kapcsán alapvető fontossággal bír a stratégiai szemlélet alkalmazása: ez magában foglalja a helyi, specifikus problémák, igények és szükségletek, valamint erőforrások feltárását és az ezekhez kapcsolódó sajátos célok, tevékenységek és módszerek, illetve eszközök, a célok elérését biztosító utak, alternatívák meghatározását, illetve a fenntarthatóság kritériumainak való elégtételt úgyszintén. Az elérendő célokat és a célok megvalósításához kapcsolódó tevékenységeket, feladatokat a szereplők célszerűen partnerségben kivitelezik. Gondos tervezés, előkészítés, hatékonyan működő kommunikáción alapuló, közös érdekeltséget és együttműködést képviselő partnerség és tapasztalt menedzsment hiányában a stratégia gyakorlatban való megvalósíthatósága kétségessé válhat.

A stratégiaalkotásnak része kell, hogy legyen a szereplőkkel való érdekegyeztetés és közösségfejlesztés úgyszintén. Minél inkább sikerül megnyerni és bevonni a helyi lakosságot a tervezési, előkészítési és megvalósítási, valamint működtetési fázisokba, annál nagyobb hatékonysággal, eredményességgel és hatásossággal kalkulálhatunk a stratégia gyakorlatban való megvalósítása során. Amennyiben viszont nem a célok irányába mutató folyamatok, történések zajlanak, illetve csak a szereplők szűkebb köreihez kötődnek a vázolt tevékenységek, úgy nyilvánvalóan csökken az említett hatékonyság, a várt hatások intenzitása és kiterjedtsége, illetve a fejlesztési kezdeményezések társadalmi elfogadottsága is.

Mint ahogy a helyi gazdaságfejlesztési stratégia megalkotása és végrehajtása, úgy a helyi gazdaságfejlesztési stratégia részeként megalkotásra kerülő szociális gazdaság-fejlesztési stratégia sem elsősorban önkormányzati, hanem helyi közösségi feladat. Ennek megfelelően a stratégiaalkotás és a megvalósítás lépéseiben a közösségfejlesztés módszereinek és eszközeinek jelentős szerepe kell, hogy legyen. Az említettek alapján a helyi erőforrásokra épülő szociális gazdaság fejlesztésére irányuló stratégia tervezése és megvalósítása egyszerre több szempontból közéletendő: gazdasági, szociális és kulturális, valamint környezeti aspektusokból egyaránt, annak érdekében, hogy eleget tegyen a fenntarthatóság kritériumainak.

Kulcsszavak: helyi gazdaság, lokális közösség, szociális gazdaság, stratégiai szemlélet, stratégia alkotás, érdekegyeztetés, közösségfejlesztés, fenntarthatóság