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Working Paper 2020-4

## **Public Policies Enabling the Social and Solidarity Economy in the City of Montreal**

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prepared for the UNRISD project on  
Promoting SSE through Public Policies:  
Guidelines for Local Governments

April 2020

\*Territoires innovants en économie sociale et solidaire

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## Abbreviations and Acronyms

<b>CAD</b>	Canadian Dollars
<b>C.C.Q.</b>	Civil Code of Quebec
<b>CDEC</b>	<i>Corporation de développement économique communautaire</i> (Community Economic Development Corporation)
<b>CDRQ</b>	<i>Coopérative de développement régional du Québec</i> (Quebec regional development cooperative)
<b>CESIM</b>	<i>Conseil d'économie sociale de l'île de Montréal</i> (Social Economy Council of the Island of Montreal)
<b>CITIES</b>	<i>Centre international de transfert d'innovations et de connaissances en économie sociale et solidaire</i> (International Center for the Transfer of Innovations and Knowledge in Social and Solidarity Economy)
<b>CLT</b>	Community land trusts
<b>CMHC</b>	Canada Mortgage and Housing Corporation
<b>CQCM</b>	<i>Conseil québécois de la coopération et de la mutualité</i> (Quebec Council for Cooperation and Mutuality)
<b>ECPAR</b>	<i>Espace concertée pour des politiques d'achats responsables</i> (Collaborative Space for Responsible Procurement Policy)
<b>FDT</b>	<i>Fonds de développement des territoires</i> (Territorial Development Fund)
<b>FLS</b>	<i>Fonds locaux de solidarité</i> (Local Solidarity Fund)
<b>GDP</b>	Gross domestic product
<b>GSEF</b>	Global Social Economy Forum
<b>LIUM</b>	<i>Laboratoire en innovation urbaine de Montréal</i> (Montreal Urban Innovation Laboratory)
<b>MAMH</b>	<i>Ministère des Affaires municipales et de l'Habitation</i> (Ministry of Municipal Affairs and Housing)
<b>MAMOT</b>	<i>Ministère des Affaires municipales et de l'Occupation des territoires</i> (Ministry of Municipal Affairs and Territorial Occupation)

<b>MAMROT</b>	<i>Ministère des Affaires municipales, des Régions et de l'Occupation du territoire</i> (Ministry of Municipal Affairs, Regions, and Territorial Occupation)
<b>MEI</b>	<i>Ministère de l'Économie et de l'Innovation</i> (Ministry of Economy and Innovation)
<b>MESI</b>	<i>Ministère de l'Économie, de Science et de l'Innovation</i> (Ministry of Economy, Science, and Innovation)
<b>MMAR</b>	<i>Ministère des Affaires municipales et des Régions</i> (Ministry of Municipal Affairs and Regions)
<b>MOU</b>	Memorandum of understanding
<b>MRC</b>	<i>Municipalités régionales de comté</i> (Local and regional municipal counties)
<b>PAGE</b>	<i>Plan d'action gouvernemental en Entrepreneuriat</i> (Government Action Plan on Entrepreneurship)
<b>PIEC</b>	<i>Programme d'immobilisation en entrepreneuriat collectif</i> (Programme for Fixed Assets in Collective Entrepreneurship)
<b>PraM</b>	<i>Programme Réussir à Montréal</i> (Succeed in Montreal Programme)
<b>RISQ</b>	<i>Réseau d'investissement social du Québec</i> (Quebec Social Investment Network)
<b>SAM</b>	<i>Système alimentaire Montréal</i> (Montreal Food System)
<b>SHDM</b>	<i>Société d'Habitation et de Développement de Montréal</i> (Montreal Housing and Development Corporation)
<b>SMEs</b>	Small- and medium-sized enterprises
<b>SSE</b>	Social and solidarity economy
<b>UTILE</b>	<i>Unité de travail pour l'implantation de logement étudiant</i> (Student Housing Development Work Unit)

## Acknowledgements

The authors would like to thank the following people for their collaboration: Johanne Lavoie, Commissionaire responsible for the social economy, Economic Development Services, City of Montreal; Charles Gagnon and Myriam Déry, Development Agents, Chantier de l'économie sociale; and Anyle Côté, Coordinator, CÉSIM (Montreal Social Economy Hub).

## Summary

The social economy has been intrinsic to the socioeconomic landscape of Montreal for more than one hundred years. Citizen mobilization, and the adoption of a place-based ecosystemic approach adopted in the 1980s in response to crisis, have shaped the evolution of the social economy in Montreal since.

This paper describes the development of the Montreal social economy from 2013 to 2019. It situates this trajectory in the Canadian political system in which the provincial and federal governments play an important role in the implementation of enabling policy for the social economy and in which municipalities have a limited capacity to intervene. In Quebec, municipal charters—which outline the boundaries of their authority—are created and regulated by the National Assembly of Quebec. Therefore, within the nested political structure of Canada and Quebec, municipalities cannot be considered separately from the provincial and federal levels of government. That said, in several areas, the province of Quebec does grant resources and responsibilities to municipal governments, including the mandate to directly support new enterprise development. This context has thus not precluded the creation of significant relationships between the social economy and the Montreal municipal government, particularly on a sectoral basis.

The period covered in this paper begins in 2013 with the adoption of framework legislation on the social economy by the Quebec National Assembly. In its wake, a series of public policies and programmes were maintained or created to support its development. The paper documents the new initiatives that have been adopted at the municipal, provincial and federal levels from 2013-2019 as well as certain setbacks to the ecosystem of support due to policy decisions at the provincial and municipal level.

The period 2013-2019, as in past decades, is characterized by an on-going process of co-construction spearheaded by a diversity of actors. The evolution of the social economy during this period is a clear demonstration of its resilience and its deep roots in many sectors. The paper illustrates the important contribution of social economy enterprises to Montreal's socioeconomic development in key sectors affecting the quality of life, including housing, culture, sports and recreation and food systems.

The final section summarises the major changes during the seven-year period including the development of the social economy in emerging sectors, innovations in traditional sectors, an increased contribution from universities and youth and the intersections with new trends such as the circular economy and the commons. It also draws certain lessons including the importance of adopting and maintaining an integrated, ecosystemic approach, the importance of establishing relations based on partnerships and not on the subordination of the social economy to a political agenda or to public administrations and the importance of integrating the social economy into an overall vision of ecological and social transition in an urban setting.

In conclusion, the period of 2013-2019 underscores the strength and resilience of Montreal's social economy despite setbacks at the policy level. A culture of collaboration and collective action which has spearheaded the growth of the social economy in the city over the past decades remains deeply rooted and as this paper is being written, the mobilisation of civil society actors, and particularly youth, in favour of an ecological and social transition that is transforming the dominant development model, is opening the door to a new growth spurt in Montreal's social economy.

## Introduction

The social economy has been part of the socioeconomic landscape of Montreal for more than a century. Mutual associations were first established at the end of the 19<sup>th</sup> century; financial cooperatives emerged early in the 20<sup>th</sup> century with the creation of *Mouvement Desjardins* and credit unions across Quebec. Cooperatives have played a significant role in key sectors including agriculture, finance, education throughout the 20<sup>th</sup> century. Today the social economy includes a diversity of not-for-profit enterprises. Its rapid growth in old and new sectors in the mid 1980's in response to social, environmental and cultural challenges at the time, was the result of citizen mobilisation at the neighbourhood level. This period has shaped the evolution of the social economy since and its integration into a vision of urban development embedding its many constituent enterprises and organizations in a place-based or *ecosystemic* approach.<sup>1</sup> There are currently approximately 2,780 social economy enterprises in Montreal (Institut de la Statistique du Québec, 2019).

In 2013, important changes in public policy, both positive and negative, affected the trajectory of the social economy throughout Quebec, including the city of Montreal. This paper describes the evolution of Montreal's social economy from 2013-2019, documenting its resilience in the face of numerous challenges.

To understand this recent period, it is very important to situate the city of Montreal and all cities across Canada, within the Canadian political system—a division of powers and responsibilities that defines the role of municipalities in all areas, both their obligations and their limitations. This certainly applies to the social economy in Montreal and considerably limits the capacity and potential to design and execute public policy at the municipal level. That said, constitutional or juridical boundaries have not precluded the development of significant relationships between the social economy and municipal government and its support for local social economy initiatives.

The history of the social economy throughout the province of Quebec has been characterised by an ongoing process of co-construction spearheaded by a diversity of actors including practitioners in collective enterprises, social movements, multi-stakeholder place-based organizations and different levels of government. Together, they have contributed to its development and to designing an enabling policy environment (Neamtan, 2019). The social economy has also experienced the consequences of electoral politics and changes in orientation. However, because it is rooted in community, the Montreal social economy has been able to withstand the winds of political change. Moreover, governments at all levels have recognized that it is in their best interest to collaborate with social economy actors and organizations; this collaboration has taken multiple forms.

### ***Division of Power in Canada: Federal, Provincial, Municipal***

There are three levels of government within the Canadian political system: federal, provincial, and municipal. At the federal level, Parliament and the government in power are responsible for issues that affect the entire country such as criminal law, national security, international trade, and immigration, albeit not always exclusively. Provincial

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<sup>1</sup> We speak of the social economy in Montreal and across Quebec. Today, reference internationally is frequently to the social and solidarity economy to include its diversity of legal forms (cooperative and not for profit enterprise or organization). We will use the term social economy for Montreal as it embraces what is known as SSE internationally. When referring to international experiences, we use social and solidarity economy.

governments have authority over matters that are within their jurisdiction, including education and health, labour standards and employment, social services, and housing. Municipal governments—cities, towns, and districts—have a much more limited role compared to their federal and provincial counterparts (Government of Canada, n.d.). Municipalities must follow and enforce provincial law. In Quebec, municipal charters—which outline the boundaries of their authority—are created and regulated by the National Assembly of Quebec.<sup>2</sup> Therefore, within the nested political structure of Canada and Quebec, municipalities cannot be considered separately from the provincial and federal levels of government. That said, in several areas, the province of Quebec does grant resources and responsibilities to municipal governments, including the mandate to directly support new enterprise development. For example, the City of Montreal assumes responsibility for supporting the emergence of and consolidation of small- and medium-sized enterprises (SMEs), including social and solidarity economy (SSE) enterprises.

With a population of approximately 2 million (2019) and a GDP of over CAD 135 billion, Montreal is Quebec's largest city (City of Montreal, n.d.). The City is divided into 19 administrative boroughs, each with their own borough council and mayor, and are delegated responsibility by the city for local affairs and infrastructure.

Despite institutional limitations, the City of Montreal does have some power over certain areas within their jurisdiction. Municipal governments have the authority to determine their own property taxes, zoning, and various permits and licenses, such as animal permits and business licenses. However, they have very limited capacity for revenue generation. Notwithstanding its greater responsibility for social and economic development, similar to other cities around the world, Montreal's sources of revenue remain relatively fixed. Property taxes represent more than two thirds of revenue. The rest is generated from a combination of user fees, small amounts from government transfers and quota shares from reconstituted municipalities (boroughs). While this severely constrains the ability of the City of Montreal to take a leadership role in promoting and investing in the development of the social economy, there are both old and new opportunities and initiatives in which the City is actively engaged.

For example, significant provincial legislation was passed in 2017, potentially increasing the capacity of the City of Montreal to support the social economy. With the adoption of Bill 121 (*Act to increase the autonomy and powers of Ville de Montreal, the metropolis of Quebec*), the City of Montreal officially became the province's metropolis, with new powers, including control over social housing, operating hours of businesses, and fiscal benefits to businesses in street construction zones without prior consultation with the province. Another recent bill, Bill 122 (*Act principally to recognize that municipalities are local governments and to increase their autonomy and powers*), introduced the possibility for municipalities to invest directly in certain enterprises, and particularly in solidarity cooperatives for the first time, opening the way to financial partnerships in social economy enterprises.<sup>3</sup> Most notable is the ability of the City to acquire immovable property to be used for affordable or family housing, and to create housing programmes without the

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<sup>2</sup> It is worth noting that in the province of Quebec, national often refers to the government of Quebec, and not the federal level of government.

<sup>3</sup> The Cooperatives Act in Quebec was amended in 1997 to establish solidarity cooperatives consisting of "members who are users of the services provided by the cooperative and of members who are workers of the cooperative, partnerships that have an economic or social interest in the pursuit of the objects of the cooperative. Each such group of members may elect one director." Bill 90 (An Act to amend the Cooperatives Act to allow the establishment of solidarity cooperatives).

authorization of the *Société d'habitation du Québec* (Quebec Housing Corporation). As well, the City of Montreal announced on February 17, 2020, as part of its larger commitment to build 12,000 affordable housing units by 2021, that it will exercise the right of first refusal to purchase land for sale to build low cost housing and has committed CAD 50 million to this initiative (CBC, 2019). This allows the City to buy property before it is put on the open market in a context where spaces are rare and property costs are skyrocketing. This reinforces the longstanding commitment of the City to support the social economy in low cost cooperative and not-for-profit housing initiatives.

At a more micro level, some boroughs (districts) in Montreal have advanced more than others in promoting the social economy within their jurisdictions. The borough of Montreal-Nord, for example, a multicultural low-income neighbourhood, has identified the social economy as one of its three priority areas in its borough-level economic development strategy (Borough of Montreal-North, 2019).

One objective of this paper is to summarize the public policies enabling the SSE in Montreal during the period 2013-2019. While these policies are, for the most part, generated at the provincial level as stated above, Quebec is part of a growing trend internationally to devolve responsibility for social and economic development to cities, calling for increasing coordination and alignment between all levels of government. In all cases, it requires collaboration between local government and civil society. The co-construction of public policy has characterized the Quebec social economy experience at all levels of government.

A second objective of this paper is to deepen the understanding of the development of public policies and the social economy ecosystem in Montreal and to propose guidelines that policymakers can use to design and implement public policies for the SSE in other urban settings. The overarching institutional context in which the social economy has flourished in Quebec is key to this understanding. We wish to underscore that institutional context matters considerably and how the SSE will be supported in different cities will vary accordingly. In Quebec, as we have stated, the autonomy of the municipal government is limited. In other countries and regions, cities have far greater responsibility and voice. What is common, however, is that regardless of context, cities are increasingly faced with challenges they are asked to meet within institutional and fiscal contexts that are often rigid and do not correspond with these realities.

At the heart of the history of Quebec's social economy is *process*: how civil society has driven the development of the social economy and how policy makers have partnered with actors in designing the most effective enabling policy measures over time. While there remain many policy gaps and institutional misalignment with different levels of government or within departments and ministries with limited mandates, it is well understood that these can only be transcended through broad stakeholder, inter-ministerial and at times, inter-governmental collaboration. This establishes a setting for policy design as illustrated by the 2009 partnership agreement signed by the City of Montreal, social economy actors, local development agencies, solidarity finance representatives and academic researchers to create a dialogic space to better understand the needs and tools necessary for the development of the social economy in recognition of its contribution to the socioeconomic development of the City of Montreal (see Box 1). While no policy measures as such were part of the agreement, the necessity for stakeholder dialogue or

*concertation*<sup>4</sup> in exploring and proposing new policies, revising or eliminating outdated policies, was recognized. We will return to this important feature of the social economy in Quebec, but it sets the stage for what follows. The initiatives taken by government and organizations engaged in and with the social economy in Montreal and throughout Quebec are the result of such *processes* that vary according to borough/neighbourhood, region, sector, target population and so on. Recognizing the heterogeneous nature of the social economy is at the heart of the Montreal experience, a culturally rich and diverse city, and a city committed, like many other major metropolises around the world, to innovative strategies for inclusive, sustainable and democratic urban development (see Box 1).

**Box 1. A Social Economy Partnership for Community-Based Sustainable Development (2009)**

“The partnership, stemming from a commitment by players in the social economy and the city administration, is a true lever for economic growth based on five strategic directions, which will help us to build an increasingly open and inclusive society:

- Support for community-based entrepreneurship, to strengthen local roots, support community-based entrepreneurs and foster major social economy projects;
- Contribution by the social economy to major projects, to encourage its integration from a sustainable development perspective;
- Contribution by the social economy to improving quality of life, so as to continue innovating in such areas as culture, sustainable development, housing, community-based property development, recreation and tourism;
- Business practices to encourage the growth of social economy enterprises;
- Promotion of the social economy, to showcase our creativity at home and abroad” (City of Montreal, 2009:4-5).

The following classification of public policies for the social economy includes legal framework and legislation; supporting organizations; development plans and programmes; capacity building; awareness, communication and advocacy strategies; and research, data collection and knowledge transfer. We identify numerous policy measures that correspond with this classification specifying their policy domain, which, in most cases, is at the provincial level with important impact on the development of the social economy in the City of Montreal and, at times, includes complementary actions by municipal government. In some cases, the municipal government is a partner in a particular policy initiative or is given responsibility for its deployment, in others. It is a variegated portrait that does not follow a straight line directly linking municipal government policy capacity to social economy enterprises. We need to consider public policy enabling the social economy in Montreal as a *flow* and not a *stock* of measures designed and implemented by municipal government. That said, and we repeat, the tide is shifting. In our view, the City of Montreal will be given more latitude to initiate municipal policy for the social economy. Moreover, and most important, the innovations that are currently under way in Montreal are being driven by social economy actors in collaboration with social movements, the private sector and chambers of commerce, educational institutions, health and social service providers and foundations. After two years of a new municipal administration, certain recent

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<sup>4</sup> A term used in Quebec which refers to multi-stakeholder dialogue within a territorial- or place-based approach to development, in collaboration with local actors including business, labour, civil society organizations and local government.

initiatives are forcing the City of Montreal to identify the collaborative processes in which its 2009 partnership with social economy actors, and civil society more broadly, will evolve. Examples will be provided below.

The first part of the paper summarizes the impact on what we call the *derivative relationship between municipal government and the social economy* that flows from measures adopted at the provincial level. Following this, we will provide illustrations of both long-established and more recent examples of *ad hoc municipal support* for social economy initiatives in Montreal. In our view, the growth of this form of support will continue as efforts may also be made to work towards more policy autonomy. Many new and dynamic initiatives, be they sectoral or integrated place-based strategies, are emerging and are not passively waiting for government support to get off the ground. They are, on the contrary, challenging traditional practices and insisting on the need for new relationships and new development models to initiate ecological and social transition. The current municipal government has shown interest in exploring this path. For the social economy, this process is on a continuum of collaboration in policy design that has been central to the Quebec and Montreal social economy experience.

## 1 Legal Framework and Enabling Legislation

### 1.1 Social Economy Act (2013)

2013 was an emblematic year for the social economy in Quebec. Under the leadership of the *Affaires municipales, des régions et de l'Occupation du territoire* (MAMROT; **Ministry of Municipal Affairs, Regions and Land Occupancy**)<sup>5</sup>, Government of Quebec, the Chantier de l'économie sociale—the network of networks in the social economy—representatives of several government ministries and academic researchers collaborated in every step involved in drafting this framework legislation. The *Social Economy Act* was adopted unanimously by Quebec's National Assembly on 10 October 2013. This lengthy collaborative process marks a watershed in the history of the social economy. Its diversity and cross-sectoral characteristics are embodied in this process and in the legislation that was subsequently adopted. The passage of this legislation enforces inter-ministerial collaboration and the obligation of all ministries to integrate the social economy in the elaboration of new public policies and programs. It also enshrines long-standing stakeholder dialogue and partnership in law to represent the diversity of the social economy across sectors and target populations.

In the exercise of their powers and responsibilities, all ministers ...must, in their actions and with respect to any agency referred to in section 4 for which they are responsible, recognize the social economy as an integral part of the socioeconomic structure of Québec by taking it into consideration in measures and programs, when updating those measures and programs, and in developing new tools for enterprises. In addition, whenever it is relevant, ministers must promote social economy initiatives carried out in Québec and at the international level (Social Economy Act, 2013, c. 22, s.7).

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<sup>5</sup> Currently renamed Ministry of Municipal Affairs and Housing (*Ministre des Affaires municipales et de l'Habitation*; MAMH).

The Act recognizes the role of the social economy and its two principal interlocutors, the **Chantier de l'économie sociale** and the Conseil québécois de la coopération et de la mutualité (CQCM; **Quebec Council for Cooperation and Mutuality**), the network of cooperatives in Quebec, in the socioeconomic development of Quebec. It provides a co-constructed legal definition of the social economy that includes “all the economic activities with a social purpose carried out by enterprises whose activities consist, in particular, in the sale or exchange of goods or services, and which are operated in accordance with the following principles:

- (1) the purpose of the enterprise is to meet the needs of its members or the community;
- (2) the enterprise is not under the decision-making authority of one or more public bodies within the meaning of the Act respecting Access to documents held by public bodies and the Protection of personal information (chapter A-2.1);
- (3) the rules applicable to the enterprise provide for democratic governance by its members;
- (4) the enterprise aspires to economic viability;
- (5) the rules applicable to the enterprise prohibit the distribution of surplus earnings generated by its activities or provide that surplus earnings be distributed among its members in proportion to the transactions each of the members has carried out with the enterprise; and
- (6) the rules applicable to a legal person operating the enterprise provide that in the event of its dissolution, the enterprise's remaining assets must devolve to another legal person sharing similar objectives (Social Economy Act, 2013, c. 22, s. 3).

Social economy organizations may take one of three legal forms: cooperatives, mutuals, and enterprising nonprofits. Cooperatives are further classified into five types: producer, worker, worker shareholder<sup>6</sup>, consumer, and solidarity cooperatives<sup>7</sup>.

The Social Economy Act also legally requires the Quebec government to adopt a Social Economy Action Plan. A first five-year plan, adopted in 2008 in collaboration with social economy actors, was the basis to argue for the inclusion of five-year action plans in the 2013 legislation. A second action plan was adopted for the period 2015-2020 as proscribed by law. The third will be announced by a newly elected government in the coming months.

## 1.2 Social Utility Trusts

While the framework legislation covers different forms of collective enterprises, an important legal innovation, the social utility trust, is gaining increasing importance in Montreal as well as in many regions of the world. Community land trusts (CLTs) are the best-known examples of social utility trusts. The first CLT in Canada was created in Montreal in 1983, requiring both provincial and federal legislation. Its creation was emblematic as it prevented the eviction of numerous residents and families from their

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<sup>6</sup> A worker shareholder cooperative (*coopérative de travailleurs actionnaire*) is an incorporated cooperative which has partial ownership of the business in which the cooperative's members are employed. Governance of the enterprise is shared between the workers and other shareholders.

<sup>7</sup> A solidarity cooperative is a nonprofit multi-stakeholder cooperative which brings together at least five people who represent at least two of the following member categories: user members, worker members, and supporting members (other interested individuals or companies).

homes and from their community in a downtown neighbourhood targeted for redevelopment by private investors.<sup>8</sup> It was a landmark legal victory for civil society.

Social utility trusts directly address the social purpose of property. First introduced in the reform of the Civil Code of Quebec (C.C.Q.) in 1994, a social utility trust is not a legal person, but a juridical form and a legal contract which assigns a social purpose to a patrimony (for example, land or heritage property). Rather than operating for the benefit of a private entity, this juridical form enables a group of individuals to own and manage a common good resource collectively for the benefit of a community (Marchand, 2019).

Social economy actors are currently promoting the development of social utility trusts in rural and urban settings. As a legal form which places more emphasis on use rather than ownership, social economy enterprises may use social utility trusts for the perpetual protection of real estate or land against speculation, under a collective form of governance (Marchand, workshop, May 29, 2019). For example, when applied to nature, a social utility trust would protect its ecological integrity and purpose. When applied to a heritage building, a social utility trust will preserve its historical value (Marchand, 2019:12). Social utility trusts essentially transform how one thinks about rights to land or real estate and governance.

For now, there are 12 social utility trusts in Quebec (Marchand, workshop, May 29, 2019). As real estate speculation continues to reduce the affordability of housing, the social utility trust model/CLT is now being considered as a way to maintain affordability on a long-term basis.<sup>9</sup> The City of Montreal is currently exploring this option with social economy actors that will ultimately require enabling municipal policy support. This development will be followed closely.

## 2 Supporting Organizations

The limitations of policy autonomy at the municipal level apply equally to identifying support organizations in the City of Montreal, frequently established and managed at the provincial level. That said, some responsibilities are carried out by municipalities and adapted to their specific contexts. We begin with examples of institutional support at the provincial level followed by examples at the municipal level.

### 2.1 Provincial

As mentioned in the previous section on legislation, the social economy must now be included in public policy measures and programmes across all government ministries by law. Accordingly, several ministries have responded in different ways to the framework law by: (i) adopting action plans specifically for the social economy; (ii) recognizing the role of the social economy in related action plans; and (iii) adding the social economy to

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<sup>8</sup> For detail on the Milton Park “story,” see: Hawley, Joshua and Dimitrios Roussopoulos (eds.). 2019. *Villages in Cities: Community Land Ownership, Cooperative Housing and the Milton Park Story*. Montreal: Black Rose Books.

<sup>9</sup> At the center of the interest in this model is TIESS (Territoires innovants en économie sociale et solidaire; Innovative Territories in Social and Solidarity Economy), a knowledge transfer institute in the social economy which recently published a *synthèse de connaissances* on social utility trusts. Current initiatives undertaken by TIESS also include a pilot project, and the production of a guide on how to create social utility trusts for social economy enterprises.

the mandate of an existing unit or creating administrative units dedicated to the social economy . We trace this to the adoption of the first action plan in 2008 which raised the visibility of the social economy in government and embedded a multi-stakeholder process of co-construction in public policy that was difficult if not impossible to reverse, regardless of political party in power (Ministry of Municipal Affairs and Regions, 2008).

**Table 1. Collective Entrepreneurship Government Action Plan (2008)**

<b>Name of Ministry</b>	Ministry of Municipal Affairs and Regions
<b>Date (Year)</b>	2008
<b>Policy</b>	Collective Entrepreneurship Government Action Plan (2008)
<b>Description</b>	The plan advanced the recognition of the social economy as an important tool for territorial development requiring inter-ministerial support.

Although the 2008 government action plan was adopted by the *Ministère des Affaires municipales et des Régions* (MMAR; **Ministry of Municipal Affairs and Regions**),<sup>10</sup> the responsibility for the social economy was subsequently transferred to the Ministry for Economic Development in 2012. The MMAR has continued to assume certain responsibilities through its support to municipalities for local and territorial development, including a CAD 420 million fund (2016-2019) available to municipalities for their development priorities.

Currently, it is the *Ministère de l'Économie et de l'Innovation* (MEI; **Ministry of Economy and Innovation**) that is responsible for the social economy.<sup>11</sup>

**Table 2. Social Economy Government Action Plan 2015-2020**

<b>Name of Ministry</b>	Ministry of Economy and Innovation
<b>Date (Year)</b>	2014
<b>Policy</b>	Social Economy Government Action Plan 2015-2020
<b>Description</b>	The key objectives of the Action Plan were to build the capacity of social economy enterprises and promote their growth, particularly by facilitating their access to markets and to social finance. The Action Plan allocated a budget of CAD 100 million, to create or maintain 30,000 jobs over the 2015-2020 period (Ministry of Economy and Innovation, 2014).

At an administrative level, the Collective Entrepreneurship team within the overall business development division of the MEI, coordinates government interventions in the social economy. It also manages some small programmes and provides financial support to network organizations (intermediary organizations) including the Chantier de l'économie sociale and the CQCM. It also provides support for regional social economy poles (hubs) across Quebec, including the regional pole of Montreal, *Conseil d'économie sociale de l'île de Montréal* (CESIM; **Social Economy Council of the Island of Montreal**).<sup>12</sup> The MEI is also responsible for the Quebec government's innovation policy

<sup>10</sup> Currently renamed *Ministère des Affaires municipales et de l'Habitation* (Ministry of Municipal Affairs and Housing).

<sup>11</sup> This ministry was previously known as *Ministère de l'Économie, de Science et de l'Innovation* (MESI) until its name changed under the new government elected in 2018. The action plan was adopted under MESI. Nothing changed as the government is committed to this plan until 2020.

<sup>12</sup> There are 19 regional social economy poles in all regions of Quebec, and an additional 3 poles representing indigenous communities. Each pole is an official interlocutor on social economy issues, and promotes cooperation between various community stakeholders. CESIM acts as the regional social economy pole for Montreal.

and in that context, finances four centres of liaison and knowledge transfer in social innovation, including *Territoires innovants en économie sociale et solidaire* (TIESS; Innovative Territories in the Social and Solidarity Economy),<sup>13</sup> an initiative of the Chantier and its research partners.

In 2018, MEI adopted an additional **Action Plan on Entrepreneurship 2017-2022** (PAGE; *Plan d'action gouvernemental en Entrepreneuriat*), with a total envelope of CAD 345.7 million (Ministry of Economy and Innovation, 2018). Although the PAGE was announced in 2018, the first year of funding was within the 2017-2018 fiscal year. This action plan recognizes the potential contribution of collective entrepreneurship to the economic development of Quebec, designating an envelope of CAD 4.7 million for collective enterprises. The Chantier de l'économie sociale received CAD 180,000 for a three-year period (2018-2021) with a mandate to accompany *projets structurants* (initiatives with significant potential impact).

**Table 3. Action Plan on Entrepreneurship 2017-2022**

<b>Name of Ministry</b>	Ministry of Economy, Science and Innovation
<b>Date (Year)</b>	2017
<b>Policy</b>	Action Plan on Entrepreneurship (PAGE) 2017-2022
<b>Description</b>	The Chantier received CAD 180,000 over three years to support <i>projets structurants</i> (initiatives with significant potential impact) in the social economy.

In addition to the MEI, the *Ministère de l'Environnement et de la Lutte contre les changements climatiques* (**Ministry of Environment and the Fight against Climate Change**) adopted a Sustainable Development Strategy 2015-2020, with support for the development of social economy enterprises contributing to the transition to a green and responsible economy (Ministry of Environment and the Fight against Climate Change, 2015).

**Table 4. Government Sustainable Development Strategy 2015-2020**

<b>Name of Ministry</b>	Ministry of Environment and the Fight against Climate Change
<b>Date</b>	October 28, 2015
<b>Policy</b>	Government Sustainable Development Strategy 2015-2020
<b>Description</b>	Identifies the support for the development of social economy enterprises working towards the transition to a green and responsible economy as a component of the strategy

The Ministère du Travail, de l'Emploi, et de Solidarité sociale (**Ministry of Labour, Employment, and Social Solidarity**) has been a historic partner of social economy organisations. Its Plan d'action de développement durable du ministère du Travail, de l'Emploi et de la Solidarité sociale 2016-2020 (Action Plan on Sustainable Development 2016-2020) identified supporting the development of the social economy in Quebec as one of its goals, including the training of 3,400 homecare workers by 2020. According to the Ministry's Annual Report 2018-2019, as of 31 March 2019, there were more than 2,100 employees who had enlisted in this training program.

<sup>13</sup> TIESS is a knowledge transfer institute in the social economy.

**Table 5. Action Plan on Sustainable Development 2016-2020**

<b>Name of Ministry</b>	Ministry of Labour, Employment, and Social Solidarity
<b>Date</b>	19 March 2016
<b>Policy</b>	Action Plan on Sustainable Development 2016-2020
<b>Description</b>	Identifies supporting the development of the social economy in Quebec as one of its goals, including the training of 3,400 homecare workers by 2020.

## 2.2 Municipal

The City of Montreal has also taken several concrete actions in favour of the social economy since 2013, within its juridical limitations. As noted earlier, Montreal adopted **A Social Economy Partnership for Community-based and Sustainable Development 2009** even before the adoption of the provincial framework law for the social economy in 2013 (City of Montreal, 2009). In recognition of the significant contribution of the social economy to the socioeconomic development of Montreal, the partnership identified five commitments: support for collective enterprises; increasing the role of the social economy in major city projects; facilitating a greater contribution of the social economy in improving the quality of life of citizens; encouraging the private sector to be more open to the social economy; and engaging in a more integrated promotion of the social economy (City of Montreal, 2009:16).

**Table 6. A Social Economy Partnership for Community-Based and Sustainable Development (2009)**

<b>Direct Engagement</b>	City of Montreal
<b>Date (Year)</b>	2009
<b>Policy</b>	A Social Economy Partnership for Community-based and Sustainable Development (2009)
<b>Description</b>	Establishes official recognition of the contribution of the social economy to answering some of Montreal's key challenges.

The City of Montreal had no formal structure to carry out the responsibilities outlined in the 2009 partnership agreement. It identified the division for Housing and Social Development as a key partner and established an informal Social Economy Unit with a social economy commissioner. Establishing an office for the social economy affirmed the City's recognition of the need for social economy representation at the municipal level. The subsequent transfer of the responsibility for the social economy to the Economic Development division, at the demand of social economy actors, confirmed the recognition by the City of the broader role of the social economy in the local economy, beyond its important but more limited contribution to social affairs.

In May 2018, with the adoption of an Action Plan for Social Innovation, a new social innovation team was informally established within the Economic Development Division. This team is now responsible for the social economy within the City of Montreal and for developing and financing programmes and partnerships with stakeholders, in line with its first **Action Plan for Social Innovation (2018-2022)**, also known as Action Plan TISSER (fr.: *weave*) (City of Montreal, 2018a). It is one of eight action plans within the City's larger economic development agenda. By outlining the actions that the City can take to promote and integrate the social economy into its socioeconomic development strategy as well as into its overall operations and into the daily lives of Montreal citizens, the City is applying an *ecosystemic* or integrated lens to the social economy, beyond its constitutive collective enterprises. This comes after several years of collaborating with social economy actors,

organizations and networks. Embedding the social economy into a place-based territorial model is at the heart of successful municipal support for the diversity of social economy actors, organizations, enterprises and networks in Montreal.

**Table 7. Divisions Related to the SSE within the City of Montreal**

Name of Division	Name of Policy	Date (Year)	Description
Social Economy Office (Social Development Division)	-	2009	The mandate for the social economy was initially given to the Division of Housing and Social Development and subsequently transferred to the Economic Development Division.
Social Innovation Team (Economic Development Division)	Action Plan for Social Innovation (2018-2022)	2018	Promotion of the social economy in the city of Montreal.

The following examples demonstrate the path the City has taken in recent years to work with social economy organisations in the management of public spaces (buildings and parks) through innovative collaborative governance (see boxes 2, 3, 4 and 5). These processes recognise the intrinsic link between the social economy and the concept of the commons. Inspired by commons initiatives<sup>14</sup> in numerous cities around the world, these illustrations cut across sectors and illustrate the growing interest in the intersections between the social economy and innovative forms of governance in an urban context. It is also a strong indication of the direction the City of Montreal is taking and most important, its recognition that partnering with social economy actors is key to achieving its goals of sustainable and inclusive urban development. Beyond individual initiatives, a new and evolving territorial initiative in the east of Montreal may engage the City in a similar process.

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<sup>14</sup> For details on the concept of the City as Commons, see: <https://labgov.city/city-as-a-commons/>

### **Box 2. La Tohu and Frédéric Back Park**

La Tohu is a social economy circus theatre committed to sustainable development, work insertion for disenfranchised youth and community engagement. It is located in the *Cité des arts du cirque* in the St-Michel-Parc-Extension-Villeray borough of Montreal, along with other major circus institutions, the *École nationale de cirque* and the internationally known Cirque du Soleil. Opposite to the theatre is a very large abandoned quarry and landfill that has been converted into a public eco park, a commons. Frédéric Back Park is the most ambitious environmental transformation project ever undertaken by the City of Montreal. Its approximately 190 hectares offers multiple activities to the citizens of Montreal.

The land occupied by La Tohu and Frédéric Back Park was acquired by the City of Montreal in 1995, as part of its *verdure* (green) initiative, to transform this land into a park for citizens.<sup>15</sup> Due to its proximity and commitment to the environment, in 2017, the City gave the mandate to manage a reception and interpretation centre for the park to La Tohu. For this to be effective, La Tohu now collaborates with several divisions of the City of Montreal, particularly those related to culture and public parks—as well as with the Borough of St-Michel-Parc-Extension-Villeray.

This collaborative and multi-sectoral activity is governed by various committees and *concertation* tables, involving a diverse group of cultural, community, environmental and leisure partners in the programming and appropriation of a new public space—all under the shared leadership of the municipal government and a non-profit social economy enterprise, La Tohu.

The partnership allows for flexibility and responsiveness in the design and provision of programmes, but also provides a unique opportunity for multiple stakeholders to collectively define the vision for the future park. The City of Montreal has crossed several institutional boundaries working across divisions within the municipal government, collaborating with a social economy organization and with community partners in the co-management of a park. The City of Montreal is generating *innovation in governance of a commons* with this initiative that can be replicated in other settings.

### **Box 3. Les Ateliers créatifs**

Les Ateliers créatifs (Creative Workshops) is a nonprofit real estate development initiative whose mission is to develop and protect low-cost, affordable working spaces for artists in Montreal neighbourhoods. It works with the artistic community and local development organisations to develop and manage buildings in different areas of the city through social economy business models.

Ateliers créatifs was founded in 2007 following a local mobilisation to save a building where artists were threatened with expulsion.<sup>16</sup> In 2009 the former textile factory was purchased and renovated to be able to house 43 workshops to be used by over one hundred creators. Since then it has been involved in several projects, including acquisitions and management of rental spaces reserved in larger buildings. The City of Montreal has been a strategic partner in these initiatives.

For example, in 2016 Ateliers créatifs inaugurated la Sainte-Catherine, a building with 18,000 square feet occupied by artists, artisans and cultural organisations. This purchase was made possible through the collaboration of the *Société d'Habitation et de Développement de Montréal* (SHDM; Montreal Housing and Development Corporation), a paramunicipal housing development corporation, that purchased the building with the promise to sell it to Atelier créatifs within ten years.

<sup>15</sup> <http://tohu.ca/fr/a-propos/>

<sup>16</sup> <https://www.atelierscreatifs.org/Historique>

#### **Box 4. Quartier des spectacles Partnership**

*“Live, learn, create and entertain downtown”*

Quartier des Spectacles (Entertainment District) is a special district located in downtown Montreal which has traditionally been home to many cultural and entertainment institutions. In recognition of the neighbourhood’s popularity among citizens and tourists due to its unique identity, a nonprofit organization, Quartier des Spectacles Partnership was created in 2003 with a mission to elaborate a strategic plan for the future development of the neighbourhood.<sup>17</sup> Following its creation, the City of Montreal commissioned the Partnership to animate all public spaces within the neighbourhood and to host arts and cultural projects.

Interest by other cities in the Quartier des Spectacles is a testament to its success in connecting neighbourhood public spaces with residents through arts and culture. In 2019, the social economy organization signed a *Memorandum of understanding* (MOU) with the Seoul Metropolitan Government to display the innovative installations that the Partnership has hosted in the Quartier des spectacles district in Seoul, South Korea.

#### **Box 5. Entremise**

*“To connect spaces without people, to people without space.”*

Montreal is faced with a double-edged problem. On the one hand, tenants are struggling to find affordable housing due to the lowest rate of vacancy in years. On the other hand, there are many vacant commercial spaces that serve no one. According to a report by the City of Montreal, there were 43 vacant buildings in the core downtown area, the Ville-Marie district alone in 2016 (City of Montreal, 2016).

To combat this disequilibrium in supply and demand, the City funded a project led by Entremise (mediation), a social economy organization, whose mission is to transform vacant buildings to be temporarily used by those who need them the most—nonprofit organizations, social enterprises, artists, and others who are struggling to find affordable office space—while the vacant buildings are in the midst of a transition to more permanent use. The Entremise website identifies four main pillars as the basis of its work: social economy, urban regeneration, radical inclusivity, and *patrimoine vivant* (living heritage).<sup>18</sup> The first pilot project, Project Young, was launched in June 2019, and houses approximately 40 different organizations. The City of Montreal provided the vacant industrial building for the transitional project for a duration of 22 months.

This multi-stakeholder and inter-sectoral initiative is one of the numerous illustrations in which the City supports the social economy by joining forces with other major actors including the provincial government and social finance actors.

### **3 Development Plans and Programs**

#### **3.1 Federal**

In November 2017, the City of Montreal was awarded CAD 50 million as winner of the federal Ministry of Infrastructure and Communities’ **Smart City Challenge**. This competition invited municipal and regional governments to develop and apply smart solutions for tough problems through innovation, data and technology (Infrastructure Canada, 2019). After more than a full year of planning and co-construction consultations to gather citizen input on the most important issues for Montreal, the City presented a

<sup>17</sup> <https://www.quartierdesspectacles.com/en/about/history-and-vision/>

<sup>18</sup> <https://www.entremise.ca/mission#mission/mission>

winning proposal to tackle two main urban issues—mobility and access to food—by joining forces with 36 project partners.

Both in the field of mobility and food systems, social economy organizations were selected in the City of Montreal’s proposal to lead innovations with great potential to improve the well-being of citizens in their neighbourhoods. The *Laboratoire en innovation urbaine de Montréal* (LIUM; **Montreal Urban Innovation Laboratory**), a municipal structure, coordinates the Smart City initiative.

On the theme of mobility, **Solon**, a social economy enterprise, whose mission is to support collective grass roots projects to create sustainable living environments, is leading this project. It is responsible for coordinating other partners in improving access to mobility, reducing the number of cars on the streets, and developing mobility solutions at the neighbourhood level.

In the food sector, **Récolte** (Harvest) and **Cantine pour Tous** (Cafeteria for All), both social economy organisations, are spearheading an effort to create sustainable food systems to combat food insecurity and to reduce environmental impact. With support from the LIUM, priority is given to working with a network of social economy organisations and associations to improve access to healthy food for certain target populations in Montreal.

These are excellent illustrations of alignment between policy domains, in this case, the federal and municipal government. By assuring the coordination of this federal program, the City’s LIUM can offer the necessary support. This “co-production” of public policy, that is, the delivery of a federal policy by a municipal government, will be a template for ongoing collaboration.

### 3.2 Provincial

The adoption of the Social Economy Law in 2013 has shaped the contours of public policy in Quebec since. Creating a stakeholder space for ongoing dialogue, *table de partenaires*, to advise the government on the elaboration action plans for the social economy is required by law. The 2015-2020 action plan identified the need to increase the capacity of the social economy to respond to three growing needs in Quebec society: homecare services for an ageing population, integration of the unemployed into the labour market, and support for worker cooperatives in cases of business succession (Ministry of Economy and Innovation, 2015).<sup>19</sup> It also reinforced several financial commitments of the government, including the renewal of **Investissement Québec** (Investment Quebec<sup>20</sup>)’s **Capitalization Programme for Social Economy Enterprises**, the *Programme d’immobilisation en entrepreneuriat collectif* (**PIEC**; Programme for Fixed Assets in Collective Entrepreneurship) and support for *Réseau d’investissement social du Québec* (**RISQ**; Quebec Social Investment Network)<sup>21</sup>. In summary, the action plan allocated a budget of CAD 100 million, to create or maintain 30,000 jobs during over the 2015-2020 period.

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<sup>19</sup> The Government identified CAD 1 million for the Collective Worker Business Succession Support Programme, which is designed to provide professional consulting services to workers and their employers in creating a worker cooperative in the process of business succession. However, the programme has yet to be implemented.

<sup>20</sup> Investissement Québec is the investment arm of the Quebec government, under the Ministry of Economy and Innovation.

<sup>21</sup> RISQ was created in 1997 by the Chantier and is the first investment fund exclusively dedicated to collective enterprises. Of the initial capitalization of CAD 10 million, 50% was funded by the

A critical outcome of the first Action Plan was the publication of the first **National Statistical Portrait of the Social Economy of Quebec** in 2019, to provide urgently needed and systematic data on the social economy. Until 2019, available data was largely anecdotal and outdated. *Institut de la statistique Québec* (Quebec Institute of Statistics) will now collect all information on Quebec's social economy. It is noteworthy that the development of this data base was also a process of co-construction with researchers in the social economy. According to the first report, based on 2016 data, there are more than 11,000 social economy enterprises in Quebec, of which 2,780 are in Montreal, with a gross revenue of CAD 47.8 billion, employing over 220,000 people (Institut de la Statistique du Québec, 2019). The social economy represents approximately 4.5% of the number of registered establishments in Montreal.

Another government-wide strategy, the Quebec government's *Stratégie gouvernementale de développement durable* (**Sustainable Development Strategy**) commits the provincial government to support green and sustainable business models and practices (Ministry of Environment and the Fight against Climate Change, 2015). Objective 2 of this strategy identifies supporting green social economy organizations as one of its key actions.

Born out of the mobilization of community actors, social economy enterprises, including cooperatives, have the capacity to identify and respond effectively to the emerging needs of their communities. As a result, they are an important driver of social innovation and the creation of collective wealth. The development of this business model in sectors related to the environment and sustainable development—for example, in the areas of responsible management of natural resources, waste management, or clean technologies—contributes significantly to the achievement of the target objective (Ministry of Environment and the Fight against Climate Change, 2015:36-37).

The contribution of the social economy to address social inequality is also noted in subsequent sections of this Strategy. Although the extent of the reach and impact of the Sustainable Development Strategy has yet to be measured, it is one of the many examples that demonstrate the growing presence of the social economy across various sectors, ministries, policy domains and priorities. The above example of La Tohu is but one of many in which the City is collaborating directly with a social economy enterprise committed to sustainable development. While this is a flagship illustration, there are several others, including Solon (mobility) and Récolte (food) mentioned above.

### **3.3 Municipal**

Between April and May 2018, the City of Montreal, led by Mayor Valerie Plante, presented its new Economic Development Strategy for 2018-2022, comprising 8 distinct action plans. As noted above, the **Action Plan for Social Innovation 2018-2022** acknowledges the need to support the social economy as part of its commitment to fostering all forms of entrepreneurship (City of Montreal, 2018:12). In particular, the City will increase access to the market for collective enterprises, by modifying its procurement practices.<sup>22</sup> Furthermore, the City commits to support the participation of Montreal actors in international forums on the social economy, including the Global Social Economy Forum

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government and the other 50% by private enterprises. RISQ supports collective enterprises in the pre-startup, consolidation, and expansion stages.

<sup>22</sup> The City's membership in the "L'économie sociale, j'achète!" public procurement programme is discussed later in the paper.

(GSEF) as well as the organization of study missions abroad. In 2018, the City of Montreal financed a delegation of Montreal actors to participate at the GSEF event Bilbao 2018, and in 2018-2019, it financed two study missions to Barcelona and Seoul to promote knowledge mobilization and sharing among cities committed to the social economy internationally.

### 3.3.1 Affordable Housing

In contrast to many municipal governments that have invested exclusively in public housing to respond to the needs of its more vulnerable populations, Montreal has relied heavily on social economy organisations to develop accessible and affordable community housing. As of 2018, among the 60,071 social and community housing units in Montreal, less than 35 % are public housing; 30% are nonprofit and 24% are housing cooperatives (City of Montreal, 2018c). While funding for these initiatives has been provided primarily by the government of Quebec, it involves all levels of government. The government of Canada renewed funding for community housing in 2016, after an absence of several decades.

Since 1996, the principal policy instrument has been *Accès Logis*, a provincial programme of financial support for public, private and community housing. Its goal is to support the construction or renovation of housing for low income households or people with special needs. In 2016, Montreal was given full responsibility for the management of provincial funds for social and community housing and established **Accès Logis Montreal**, a new municipal programme with the same structure, mission and clientele as the provincial *Accès Logis*, but better adapted to the Montreal context. It is co-financed by provincial funds from the *Société d'habitation Québec* (Quebec Housing Corporation) and the Montreal Metropolitan Community.

Over the years, cooperative and nonprofit housing have grown considerably. There are over 460 housing cooperatives in the Montreal region offering affordable housing to over 14,000 households as well as over 200 nonprofit enterprises with over 18,000 housing units (City of Montreal, 2018c). During the period covered by this paper (2013-2019), municipal support for the development of nonprofit and cooperative housing has accelerated since the election of a new administration in 2018.

In November 2019, the City announced additional support with a grant of up to CAD 5.3 million for the creation of 122 affordable housing units for students in the Rosemont-La Petite-Patrie district, a direct contribution by the municipal government (City of Montreal, 2019a). Under the leadership of *Unité de travail pour l'implantation de logement étudiant* (UTILE), 213 units are already in development, of which 90 will be available in 2020 (see Box 6). UTILE's goal is to make available 500 units of student cooperative housing in the next 5 years. The City of Montreal has committed to collaborate and support this initiative, thereby addressing two issues, access to affordable student housing and mitigating the pressure on the rental market for families.

On 10 February 2020, *La Presse* reported that the City announced the **Réno logement abordable** (affordable housing renovation) programme in its implementation of its existing commitment to create 12,000 units of affordable housing by 2021, as stated in the City's Action Plan for Social Innovation 2018-2022. The new programme will considerably improve the conditions of existing property and in particular, respond to the current shortage of quality housing in Montreal by providing per unit subsidies up to a maximum of CAD 500,000 per building. To be eligible, property owners must provide low cost

housing for one-third of its occupants. All occupants will be informed of the total cost of renovations, the amount of the grant, as well as the possibility for them to formally oppose increases in rent. Community and cooperative housing will be eligible for these grants. The programme is jointly financed by the provincial *Société d'habitation Québec* (Quebec Housing Corporation) and the City of Montreal in compliance with the transfer of budgets and responsibilities for housing to the City, as part of the agreement between Quebec and Montreal that recognizes the special status of the City.

As stated above, the City recently announced that it will exercise the right of first refusal to purchase properties for sale and convert these into social housing. The City identified 300 potential properties in areas in which rental housing is scarce.

### **Box 6. UTILE**

*Unité de travail pour l'implantation de logement étudiant* (UTILE) is a social economy enterprise created by students dedicated to developing affordable cooperative student housing. Close to 70% of the student population live in high rental housing in Montreal; most have modest incomes; many survive on student loans and bursaries (City of Montreal, 2019a).

UTILE was instrumental in the creation of an investment fund (Popular University Student Housing) to finance student cooperative housing initiated by the Concordia University Student Association in Montreal. The initial fund leveraged additional investments by social finance partners including the Chantier de l'économie sociale Trust and all three levels of government in 2017, enabling the purchase of land and the construction of the first student housing cooperative in downtown Montreal. The federal government, through the Canada Mortgage and Housing Corporation (CMHC), has invested CAD 3 million.<sup>23</sup>

### **3.3.2 Sports and Recreation**

The Montreal Charter on Rights and Responsibilities, adopted on 20 June 2005,<sup>24</sup> affirms that “Leisure, physical and sports activities are aspects of the quality of life that contribute to comprehensive personal development and to cultural and social integration” (City of Montreal, 2017). Municipal governments play an undisputed role in access to public infrastructure for leisure and sport activities. In Montreal, it is estimated that 75% of leisure activities are offered by nonprofit social economy organisations. (see the example of the YMCA). An example of the partnership between the City of Montreal and social economy organisations is the YMCA (see Box 7).

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<sup>23</sup> <https://www.cmhc-schl.gc.ca/en/media-newsroom/news-releases/2019/innovative-funding-model-creates-affordable-student-housing-montrea>

<sup>24</sup> There is currently a 4th edition of the Montreal Charter on Rights and Responsibilities (2017), but the Charter first came into force on January 1, 2006, after citizen consensus at the 2002 Montreal Summit.

### Box 7. YMCA

The various partnerships between the YMCA of Quebec and the City of Montreal, which the two parties have either finalized or are currently discussing, are examples of the support the City of Montreal provides for social economy organizations in various sectors, including the sports and recreation sector and education.

Initially founded in the United Kingdom, the first YMCA in North America was established in 1851 in Montreal.<sup>25</sup> Since then, the YMCA of Quebec, a nonprofit social economy organization with branches throughout the province of Quebec, has provided social and educational programmes open to all, but particularly focusing on youth and women.

In the sports and recreation sector, the City of Montreal purchased pool hours from the YMCA to make more public swimming hours available, as the existing public pools were unable to meet the needs of all citizens. Five YMCA branches in Montreal, Cartierville, du Parc, Saint-Laurent, Westmount, and Downtown, offer public swimming to Montreal citizens free-of-charge, with a proof of address in Montreal.

YMCA Cartierville is a particularly interesting case, as its very creation was made possible through a multi-stakeholder partnership between the YMCA of Quebec, Quebec Ministry of Education, the City of Montreal and the Borough of Ahuntsic-Cartierville. In 2010, in light of the absence of a sports and recreation facility in the Ahuntsic-Cartierville borough, the aforementioned partners came together to build the first YMCA in 20 years.

### 3.3.3 Food Systems

In 2016, Montreal City Council adopted a motion to create a **Food Policy Council**. The mission of the Council is to assure food security for vulnerable populations, access to healthy food for all and to develop a food system for Montreal. *Système alimentaire Montréal* (SAM; **Montreal Food System**) is the operating body of this initiative and works closely with social economy organisations, including Récolte and Cantine pour Tous, both active in the city's Smart City initiative, as noted above. SAM projects include urban agriculture and community gardens, 'solidarity markets' in areas considered food 'deserts' and reduction of food waste. With the support of the City, a broad alliance of social economy organisations, public bodies and foundations are involved in developing a sustainable food system for Montreal.

## 3.4 Boroughs

Some boroughs are advancing more rapidly than others in the social economy. The Borough of North-Montreal, for example, announced the adoption of *Plan collectif de développement économique de Montréal-Nord 2018-2023* (**Montreal-North Collective Plan on Economic Development 2018-2023**) on 30 November 2018 and identified the social economy as one of its priorities. More specifically, the Action Plan outlines three specific strategies to support the development of the social economy in the borough: implement a diversification programme for the social economy; offer *accompagnement*

<sup>25</sup> <https://www.ymcaquebec.org/fr/A-propos/Notre-histoire>

(coaching)<sup>26</sup> for pre-start up social economy enterprises and organize a forum on the social economy in Montreal-Nord (Borough of Montreal-North, 2019).<sup>27</sup>

## 4 Capacity Building

Support and assistance for the development of cooperatives is also provided by provincially funded organisations with offices in Montreal. The *Coopérative de développement régional du Québec* (CDRQ; **Quebec Regional Development Cooperative**) offers training and accompaniment for new cooperatives and is funded by the Quebec government. The *Réseau de la coopération de travail* (**Network of Worker-managed Cooperatives**), a federation of worker-managed cooperatives, offers specialised support to groups wishing to create cooperatives in which workers play a key role, be they worker cooperatives, solidarity cooperatives, producer cooperatives or *coopérative de travailleurs actionnaires* (cooperatives in which workers are investors). Their funding is also provided principally by the Quebec government.

Until 2015, local community development corporations *Corporation de développement économique communautaire* (CDECs) in Montreal were mandated to carry out local economic development strategy in collaboration with a wide variety of stakeholders. However, in 2015, the Quebec government replaced these borough-based civil society development organisations with **PME MTL** (SMEs Montreal) and six satellite development offices across the city.<sup>28</sup> PME MTL is a relatively new public structure intended to support all forms of entrepreneurship and business development, including the private sector and social economy enterprises. It receives its operational funding from the Government of Quebec and the City of Montreal through a Territorial Development Fund.<sup>29</sup> Compared to the earlier CDECs, PME MTL plays a significantly reduced role, limited to analysing and investing in small and medium-sized enterprises (SMEs). In the past, CDECs accompanied social economy enterprises from their inception through their successive stages of development, through *concertation*, integrating these enterprises into a territorial or place-based strategy in collaboration with local actors including business, labour, civil society organizations and local government. While PME MTL and its offices remain committed to development, their role is essentially restricted to receiving projects and evaluating them for development funding. However, despite these limitations, today, PME MTL remains the main organization for the financing and *accompagnement* (coaching)<sup>30</sup> for social economy enterprises and organizations in Montreal.

Recently, there have been meaningful efforts to regain some of this lost ground for local territorial development. In 2019, with funding from the **Quebec Youth Secretariat**, the

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<sup>26</sup> *Accompagnement* is a French term used in Quebec to describe the various services offered by an agent, including consulting for business development, and *concertation*. *Concertation* refers to multi-stakeholder dialogue.

<sup>27</sup> In collaboration with *Service de Développement économique* of the City of Montreal and PME MTL – East Island office. For details on PME MTL, see Section 4. Capacity Building.

<sup>28</sup> PME MTL was founded as a public local development agency after the abolishment of 18 CDECs (Centre de développement économique communautaire) and approximately 110 CLDs (Centre local de développement) in 2015. There are 6 PME MTL service centers on the Island of Montreal.

<sup>29</sup> See Section 6. Access to Finance for details.

<sup>30</sup> *Accompagnement* is a French term used in Quebec to describe the various services offered by an agent, including consulting for business development, and *concertation*. *Concertation* refers to multi-stakeholder dialogue.

Chantier de l'économie sociale and social economy regional hubs across Quebec, launched a new initiative, **SISMIC**, to support youth wishing to establish a collective enterprise.<sup>31</sup> SISMIC provides outreach and *accompagnement* and training services, much like the CDECs of the past, including guiding youth entrepreneurs from project conception, prototyping, to development. In Montreal, this initiative is coordinated by Montreal's regional pole, CESIM, in collaboration with other regional partners.

Community-based actors have also mobilised to regain recognition for the role of civil society actors in the process of local economic development. The Chantier de l'économie sociale and *Territoires innovants en économie sociale et solidaire* (TIESS; Innovative Territories in the Social and Solidarity Economy),<sup>32</sup> have been active in several initiatives to promote the full participation of civil society, including social economy actors, in the process of ecological and social transition of different neighbourhoods or boroughs of Montreal and the City of Montreal has recently made a political commitment to explore these possibilities. Discussions are on-going as this paper is being written.

## 5 Access to Markets (Procurement)

The City of Montreal has purchased goods and services from social economy enterprises over many years without explicitly favouring these enterprises. Since signing the 2009 partnership agreement, it has more explicitly selected social economy enterprises, however, in an ad hoc manner without a specific policy measure. In the area of food services, for example, the City, through its parks and recreation mandate, issued a call for proposals exclusively targeting social economy enterprises in 2011 and again in 2013. Two social economy enterprises were selected to provide food services to several thousand visitors annually in large public spaces in Montreal, **Espace Lafontaine**, a social economy restaurant in the heart of a very large public park, Parc Lafontaine, and **Projet Sol**, a consortium of six social integration enterprises, with several food facilities at Montreal's Botanical Garden and the Planetarium.<sup>33 34</sup>

In 2019, the City adopted a new edition of its **responsible procurement policy** as part of its Sustainable Development Action Plan (2016-2020). The revised responsible procurement policy favours social economy enterprises bidding for public contracts within regulatory limitations (City of Montreal, 2019b). To this end, the City has clearly identified social economy enterprises in its directory of suppliers.

Montreal is also an active member of *Espace concertée pour des politiques d'achats responsables* (ECPAR; **Collaborative Space for Responsible Procurement Policy**), an association of major public and private institutions and enterprises which collaborate to reinforce their responsible procurement practices and supply chains. ECPAR is actively involved in promoting procurement from social economy enterprises; the Chantier de l'économie sociale is a member of its Board of Directors.

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<sup>31</sup> See <https://www.economiesocialemontréal.net/programmes-et-activites/sismic/>

<sup>32</sup> TIESS is a knowledge transfer institute in the social economy.

<sup>33</sup> Espace Lafontaine has been offering food services at Parc Lafontaine since 2011. Projet Sol was first operated by Groupe APRT, a work integration enterprise from the Rosemont-La-Petite-Patrie district, then in the second phase of the project, since 2014, Projet Sol became a consortium of several work integration enterprises in the food services sector in Montreal.

<sup>34</sup> <https://espacepourelavie.ca/projet-sol-un-restaurant-de-leconomie-sociale>

An important initiative was launched in 2013 by the **CÉSIM**, Montreal’s social economy regional pole. ‘**Économie sociale, j’achète!**’ is an ongoing initiative with two main objectives: to support social economy enterprises in their business development and collaboration with the public and private sectors, and to encourage public institutions and large corporations to purchase goods and services from local social economy enterprises. This initiative mobilized 38 enterprises and 7 large institutions in the first 18 months, generating CAD 2.5 million in purchases. To date, more than 50 participating enterprises, 22 large private corporations and public institutions have participated with overall sales of more than CAD 5.7 million.<sup>35</sup>

**Table 8. City of Montreal’s Involvement in Procurement Initiatives**

Policy/Action	Year Implemented	Description
ECPAR (Espace concertée pour des politiques d’achats responsables)	2007	Montreal is an active member of ECPAR.
Espace Lafontaine; Ecosol	2013 (2011)	Social economy enterprises offer food services in public spaces. Espace Lafontaine – operates a restaurant in Parc Lafontaine (2011) Projet Sol (2013) – a consortium of social integration enterprises offers food services at <i>Espaces pour la vie</i> (botanical garden and planetarium)
Économie sociale, j’achète!	2013	Supports social economy enterprises in their business development and collaboration with the public and private sectors. Encourages public institutions and large corporations to purchase from local social economy enterprises.
Sustainable Development Action Plan 2016-2020	2015	Committed to improving the “Responsible procurement”.
Responsible procurement policy	2019	Replaces the City’s previous procurement policy of 2015. Commits the City of Montreal to favour social economy enterprises within regulatory limitations on bidding for public contracts.

## 6 Access to Finance

### 6.1 Federal

Social finance appeared on the federal agenda following the election of a new government in 2015. The 2018 Federal Budget announced a commitment of CAD 750 million over the next decade to create a **Social Finance Fund**, which would support the emergence of a social finance market across Canada. An initial CAD 50 million has been committed to an investment readiness programme for social enterprises. The Chantier de l’économie sociale has been given the mandate to manage the Quebec portion of this fund (CAD 8 million).

<sup>35</sup> <https://www.economiesocialemontréal.net/programmes-et-activites/leconomie-sociale-jachete/>

## 6.2 Provincial

The Quebec government intervenes in the area of social finance directly and indirectly through support for social finance institutions created and managed by social economy actors.

The Ministry of Economy and Innovation (MEI) has numerous financial programmes for the social economy in Quebec. The *Programme d'immobilisation en entrepreneuriat collectif* (PIEC; **Programme for Fixed Assets in Collective Entrepreneurship**) has committed CAD 20 million over a 5-year period (2015-2020) and assists social economy organizations in acquisition of property, construction or renovation (Ministry of Economy and Innovation, n.d.). The MEI also mandates **Investissement Québec**, a state investment fund, to support the capitalization of social economy enterprises. With the adoption of the Governmental Action Plan for Social Economy 2015-2020, the Quebec government increased the total amount for the **Capitalization Programme for Social Economy Enterprises**, from CAD 3 million in 2011, to up to CAD 30 million for the 2015-2020 period as previously noted (Ministry of Economy and Innovation, 2015). The programme offers non-guaranteed loans with discounted interest rates to collective enterprises. As a reference, during the 2018-2019 year, Investissement Québec accorded loans totaling CAD 5.3 million to collective enterprises under the programme (Ministry of Economy and Innovation, 2019:28).

In 2014, *Ministère d'Affaires municipales et d'Habitation* (MAMH; **Ministry of Municipal Affairs and Housing**) launched a call for projects specifically targeting social economy enterprises in the Montreal metropolitan region as part of the *Fonds d'initiative et de rayonnement de la métropole* (**Metropolis Promotion and Initiative Fund**). The *Fonds d'initiative et de rayonnement de la métropole* offered between CAD 50,000 and CAD 75,000 per project, with a total envelope of CAD 600,000 (Ministry of Municipal Affairs and Housing, n.d.). 12 social economy organizations received the subsidies administered by the *Secretariat à la région métropolitaine* (the Secretariat for the Metropolitan Region) (Métro, 2015). Although an envelope exclusively for social economy enterprises is no longer available, all enterprises, including cooperatives and nonprofits, are eligible to apply for funding.

## 6.3 Municipal

Under the framework of the 2009 partnership in social economy, through a press release on 9 June 2014, the Mayor of Montreal at the time announced the availability of a new financial assistance programme **PRaM (Programme Réussir à Montréal)– Économie Sociale** (Succeed in Montreal Programme – Social Economy) for owners and tenants of buildings that house social economy enterprises, with a budget of CAD 3.2 million over four years, from 2014 to 2017. Under the programme, social economy enterprises could obtain a subsidy of up to CAD 600,000 for the expansion or renovation of buildings, as well as an additional amount up to CAD 250,000 for professional fees. Although currently discontinued, PRaM - Économie sociale is significant in that it was the first exclusive programme for the social economy developed by a municipality in Quebec.

**Table 9. PRaM – Économie Sociale**

<b>Name of Responsible Body</b>	City of Montreal
<b>Date (Year)</b>	2014
<b>Policy</b>	PRaM – Économie Sociale
<b>Description</b>	A financial assistance programme for owners and tenants of buildings that house social economy enterprises, with a budget of CAD 3.2 million over four years, from 2014 to 2017.

Following the adoption of the provincial budget for 2015-2016, in 2015, the Quebec National Assembly passed legislation establishing a *Fonds de développement des territoires* (FDT; **Territorial Development Fund**) to enable *Municipalités régionales de comté* (MRCs; **local and regional municipal counties**) and agglomerations across Quebec to assume their increased responsibilities for local and regional development. Following the adoption of this legislation, the City of Montreal signed an agreement with the provincial *Ministère des Affaires municipales et de l’Occupation des territoires* (MAMOT; **Ministry of Municipal Affairs and Territorial Occupation**) for 2015-2020, allowing Montreal to assure the correspondence of the use of the FDT with its identified priorities (Ministry of Municipal Affairs and Housing, 2019).<sup>36</sup>

As stated earlier, the City of Montreal identified eight priorities for the 2018-2019 period, the first of which is the “Promotion of and support for entrepreneurship” (City of Montreal, 2019:2-3). To achieve this priority, the City assigned the use and dispersal of the Territorial Development Fund to PME MTL’s six satellite offices across Montreal. A total of CAD 8.7 million (CAD 7.2 million of the provincial contribution and the CAD 1.5 million provided by the City) serves as base funding for PME MTL to operate, and has allowed it to hire 90 coaching and financial consultants (2018-2019 period) and administrative staff (City of Montreal, 2019c:8).

PME MTL offers not only coaching and financial consulting services, but also manages several significant development funds, mostly capitalized by provincial programmes and private funds. In 2018, PME MTL accompanied 3325 businesses, including 500 social economy enterprises. It accorded CAD 15.3 million in loans to both private and collective enterprises, as well as CAD 1.9 million in grants to social economy entities. Note that the leverage effect of these grants was 1 to 7, generating CAD 12.6 million in investment (PME MTL, 2019).

It is important to note the participation of labour retirement funds, further distinguishing the Quebec and Montreal experience from other regions across Canada and internationally. The labour movement and its pension funds, longstanding partners in the creation of various financial instruments and institutions supporting social economy enterprises across Quebec, also participate in the capitalization of the PME MTL funds.

*Fonds d’investissement PME MTL (PME MTL Investment Fund)*, an umbrella investment fund is made up of (i) the *Fonds locaux de solidarité Montreal (Local Solidarity Fund)* and (ii) the *Fonds PME MTL (PME MTL Fund)* and finances private enterprises, nonprofit organizations, social economy enterprises, and cooperatives in start-up or development stages. The City of Montreal, the labour solidarity fund, *Fonds de*

<sup>36</sup> Initially, it was for 2015-2016, then for 2016-2019.

*solidarité FTQ*<sup>37</sup> and the government of Quebec capitalize the **Local Solidarity Fund**, which offers loans up to CAD 100,000 to businesses in the start-up or development phase. The goal is to maintain jobs in Montreal. Investments by the **PME MTL Fund** may be up to CAD 300,000, with variable interest rates depending on the perceived level of risk (PME MTL, n.d.).

The FDT primarily finances the operating costs of the PME MTL network. A portion of this is also allocated to the *Fonds de développement de l'économie sociale* (FDES; **Social Economy Development Fund**) (CAD 2.1 million) and the *Fonds jeunes entreprises* (**Young Enterprises Fund**) (CAD 1 million), two other funds managed by PME MTL.<sup>38</sup> The FDES has existed since 1996, but was restructured under PME MTL in 2016 (Bourque, 2000:202). It offers subsidies from CAD 5,000 to CAD 50,000 to social economy enterprises to support their development from pre-start-up to consolidation and growth. An additional goal of the FDES is to support projects that are pioneering new sectors, business models, or fields of expertise.<sup>39</sup>

**Table 10. Summary of Funds Managed by PME MTL Accessible to Social Economy Enterprises and Organizations**

Name of Fund	Year implemented	Description
Fonds d'investissement PME MTL	2016	1. Fonds locaux de solidarité Montréal: loans up to CAD 100,000. 2. Fonds PME MTL: loans up to CAD 300,000
Fonds de développement de l'économie sociale (FDES)	1996; 2016	This has existed since 1996, and was restructured under PME MTL in 2016. Currently FDES supports the development of social economy enterprises, offering subsidies ranging from CAD 5,000 to CAD 50,000.

## 7 Awareness

The City mainly promotes awareness of the social economy through its support for CESIM. One of the most significant initiatives of CESIM is its procurement initiative, **J'achète Montréal** mentioned earlier, and its directory of local social economy organizations and enterprises operating in the city.

Another initiative supported by the City of Montreal to raise awareness is **Faire Montréal**.<sup>40</sup> In June 2015, the City of Montreal launched an online platform which introduces projects

<sup>37</sup> Fonds de solidarité FTQ is a development capital fund established by one of the two largest labour federations in Quebec, the FTQ (Fédération des travailleurs et travailleuses du Québec). Fonds locaux de solidarité, a fund to invest in local initiatives, is one of Fonds de solidarité FTQ's investment funds established in 1991 in partnership with l'Union des municipalités régionales de comté (UMRCQ). It is especially noteworthy that the FTQ-FLS is a labour sponsored local investment fund demonstrating the longstanding commitment of the labour movement to the social economy as well as the collaboration between provincial and local government with the labour movement, which is at the heart of Quebec's social economy.

<sup>38</sup> The Fonds jeunes entreprises (young business fund) is a subsidy of up to CAD 15,000 offered to start-ups in Montreal that must be combined with a Fonds PME MTL loan. For more details, see: <https://pmemtl.com/en/financing/fonds-jeunes-entreprises>

<sup>39</sup> <https://pmemtl.com/financement/fonds-de-developpement-de-leconomie-sociale>

<sup>40</sup> See Faire Montreal, <https://fairemtl.ca/>

related to innovation, social development, and economic development among others. Many of these projects are part of the social economy. By clicking on a project, the visitor can learn about its history, stage of development, its impact on the city, its publications if any, and upcoming events.

Complementing its local activities, the City of Montreal has contributed to the promotion of the social economy internationally as an active member of the **GSEF** since its inauguration in Seoul, South Korea in 2013. The biennial Forum held in cities around the world is one of the most important events on the social and solidarity economy internationally. Montreal was the first city after Seoul to host a global forum in 2016 with more than 1500 participants from over 60 countries. GSEF 2016 led to the creation of *Centre international de transfert d'innovations et de connaissances en économie sociale et solidaire* (CITIES; **International Center for the Transfer of Innovations and Knowledge in Social and Solidarity Economy**) based in Montreal, with commitment by the governments of Seoul, Montreal, Barcelona, Bilbao, and Mondragon, to promote knowledge transfer on the social and solidarity economy between local governments. The City of Montreal, through its financial participation in **Montreal International**, offered support for the establishment of CITIES in 2017.<sup>41</sup> As stated earlier, since hosting the 2016 GSEF forum, the City of Montreal financed the participation of a large delegation of Montreal citizens, public officials, and practitioners to attend **GSEF 2018** held in Bilbao, Spain. The delegation also included a member of the City's Executive Council. The City's active involvement with GSEF is illustrative of its willingness to increase the visibility of the social economy within Montreal and internationally and to learn about initiatives and municipal support in other cities around the world.

## 8 Research, Data Collection and Knowledge Transfer

There are several organizations in Montreal whose mandates are related to research, data collection, and knowledge transfer. One introduced briefly earlier in the paper, is *Territoires innovants en économie sociale et solidaire* (TIESS; **Innovative Territories in the Social and Solidarity Economy**).<sup>42</sup> TIESS receives the majority of its funding from the Quebec government (MEI), but it also receives contracts from the City of Montreal for consulting and advisory services. For example, the City is currently exploring the potential of social utility/land trusts in an urban context and is presently considering the possibility of launching some pilot projects with TIESS.

There has been significant research activity on the social economy in Montreal over the last two decades. With a strong presence of universities, there are many collaborations and contributions by researchers, students, and institutions of higher learning on the development of the social economy. Research is largely supported by federal and provincial granting agencies. The results of this research are very useful to the City of Montreal. Over many years, *Centre de recherche sur les innovations sociales* (CRISES; **Research Center for Social Innovation**), funded by the government of Quebec, has generated numerous working papers and publications and has engaged in collaboration

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<sup>41</sup> Montreal International is a nonprofit agency whose mandate is to "attract foreign direct investment, international organizations, entrepreneurs, talented workers and international students to the region." <https://www.montrealinternational.com/en/about/>

<sup>42</sup> TIESS is a knowledge transfer institute in the social economy.

with the City of Montreal on social economy research. The City's LIUM benefits from the expertise of the *Chaire de responsabilité sociale et de développement durable* (Chair for Social Responsibility and Sustainable Development), Université du Québec à Montréal, one of Montreal's four large universities for its Smart City Challenge project on food systems. These are but two illustrations of recent collaborations between the City and the research community, funded principally by the provincial government. There are numerous others.

Most recently, in 2018, the City of Montreal announced that it would contribute funding to the second phase of **CHNGR MTL**, an innovative programme to raise awareness among university and college students across all campuses in Montreal on the social economy, through dialogue with practitioners, fieldwork, organization of events, classroom discussions and research (City of Montreal, 2018b). The initiative was co-created by Concordia University, District 3 (a start-up incubator at Concordia University), and TIESS. After a successful three-year programme funded by the RECODE programme of the McConnell Family Foundation (funding of CAD 500,000 over three years) and initiated by researchers and social economy actors in 2014, the City has provided CAD 80,000 to Concordia University to continue this initiative over a three year period 2019-2022.

As stated earlier, the recent publication of statistical portrait of the social economy by the **Institut de la statistique du Québec**, now provides indispensable data for research, knowledge transfer and awareness. The availability of this data is invaluable to an understanding of the social economy across Quebec, including Montreal. It is invaluable for policy makers in Montreal, in Quebec and across Canada as they are now enabled with accurate data. Social economy actors are emboldened by the availability of this long-awaited data, especially in their increased ability to press for public policy by all levels of government now backed by rigorous data.

## Conclusion

As this paper demonstrates, the environment in which the social economy has evolved in Montreal in the period of 2013-2019 is complex, involving a diversity of stakeholders, three levels of government and an ecosystem in reconstruction. This is partially due to the evolving policy environment as a consequence of changes in government during this period at the municipal, provincial and federal level. But the complexity in portraying the evolution of the social economy over this six-year period is also a result of the institutional recognition of the social economy, following the adoption of framework legislation in 2013. This recognition assures that the social economy is part of the broader policy discourse and often included in a wide range of sectoral and territorial initiatives, making it difficult to isolate the social economy from the overall portrait of urban development in Montreal, Quebec's metropolis.

The paper deliberately outlines policies at all levels of government in detail, both because in many cases, they intersect and in others, the City of Montreal is assigned the delivery or deployment of policy measures by higher levels of government, especially the government of Quebec. A focus only on municipal policy measures alone would be inadequate and inaccurate as it would appear as if there are few if any such measures. Moreover, as more and more responsibilities devolve to municipal government, this confirms a growing awareness internationally of the effectiveness of proximity policies. Whether the origin of

a municipal policy measure is at the level of the City itself or it is mandated to carry out policy for higher levels of government, its role is growing as is its potential for greater autonomy. The more the City recognizes the invaluable role of the social economy and the more it demonstrates its capacity to co-design, co-deliver or autonomously initiate public policy enabling the urban social economy, the need to tear down institutional and juridical boundaries will be difficult to refute. In all cases, the active collaboration with social economy actors and networks is *sine qua non*.

During the period covered in this paper, certain municipal policies, based on long standing partnerships between the City of Montreal and social economy actors continue, despite changes in government. The historic and vital role of social economy organisations and enterprises in areas such as housing, sports and leisure and culture are on-going. Today, these sectors are also sources of innovation, as demonstrated by the examples of La Tohu (leisure, environment, community building and culture) and UTILE (housing), among others.

The paper also reveals that social economy actors are increasingly involved in emerging sectors or are mobilising new technologies (intelligent cities) and new legal structures (social utility trusts) to respond to major urban challenges. This is an indication of the resilience of Montreal's social economy and its capacity to continue to respond to new needs and opportunities, despite setbacks in the overall ecosystem of support as this period was also characterized by the elimination of some key institutions, most notably local community economic development corporations, that were at the heart of the resurgence and growth of the social economy for two decades. The social economy has demonstrated its resilience as new organisations and new approaches in the field of support, development, knowledge transfer and finance have emerged to fill the void of government cutbacks or disengagement. Several new incubators and other initiatives to generate new projects have been the source of innovations and dynamic entrepreneurial activities.

While university researchers have worked in partnership with social economy actors and networks for several decades, one significant change during the period covered in this paper, is the increased involvement of universities in supporting the social economy, as well as the contribution of students and young professionals that continues to grow. Another important trend is the mutualisation or pooling of resources in several sectors, creating the conditions for scaling up not only economic impact but also social and environmental impact.

The Montreal social economy increasingly intersects with other initiatives with shared values: the circular economy, the commons, food security and sovereignty and urban mobility.

In this context, it is difficult to pinpoint one specific policy measure during this period or one level of government and to measure its impact in isolation from the rest. Applying an eco-systemic approach means that each success has been the result of a series of factors and a series of actions by a diversity of actors. The role of municipal government is only one part of the portrait, though the paper shows how the trend in Quebec, as elsewhere, is to transfer greater responsibility to local governments in numerous areas that affect the development of the social economy.

The major lessons to draw from this period are thus less at the level of public policy and more related to *process* and to an *ecosystemic vision* that integrates the social economy into overall development strategies.

The first lesson is the importance of adopting and maintaining an integrated, ecosystemic approach, relying not on one organisation or institution but on a diversity of actors and interactions. This has allowed the social economy to absorb the shock of political change and cutbacks and continue to develop through alternative approaches, including a stronger reliance on sectoral networks, a mutualisation of resources and an active involvement of universities, including business schools. The success of an ecosystemic approach relies heavily on the existence of dynamic networks that assure fluidity in the sharing of information, responsibilities and challenges. These networks must be as flexible as possible, allowing for a diversity of institutional arrangements and ad-hoc partnerships in favour of the development of social economy initiatives.

The second lesson is the importance of establishing relations based on partnerships and not on the subordination of the social economy to a political agenda or to public administrations. The practice of co-construction of public policy that has characterized the Montreal and the Quebec experience, is illustrated by the 2009 Social Economy Partnership for Community-Based Sustainable Development signed by the Mayor of Montreal and social economy stakeholders and by the creation of a permanent Partners Table in the 2013 Quebec Social Economy Framework Legislation. The role that social economy enterprises will play in the Smart City initiative is an indication that these types of partnerships are constructive and even essential for Montreal's overall development and at the same time, allow the social economy to grow and prosper.

A third lesson is the importance of integrating the social economy into an overall vision of ecological and social transition in an urban setting. The climate crisis and the sense of urgency that stems from this crisis has been strongly felt in Montreal, where 500,000 people took to the streets in a march for the climate in September 2019, constituting the largest demonstration in the world on a day of global action. The social economy is perceived by more and more people, and particularly by youth, as a part of the response to this crisis as well as to the deepening social divide. Public policy, both at a municipal and provincial level in favour of the social economy has often been the result of mobilisation and support that goes beyond those that are directly involved in its development; it is essential to social and environmental transition, identified as its top priority by the current Montreal administration. Thus, despite the lack of a structured social economy municipal policy, social economy initiatives have received city support around issues as diverse as mobility and transport, food security, access to culture, access to housing and management of public spaces. The nature and level of engagement by the City of Montreal with the social economy is best summarized as mixed, ranging from policy autonomy in certain sectors, to delivering programmes for both levels of higher government in other cases, to playing an active and growing role in ad hoc support for the social economy, often in collaboration with higher levels of government, always in collaboration with social economy actors. What is very evident today and in the period covered in this paper is that citizen-based initiatives have taken the social economy as their model to build better and more sustainable neighbourhoods.

In conclusion, the period of 2013-2019 underscores the strength and resilience of Montreal's social economy despite setbacks at the policy level. A culture of collaboration and collective action which has spearheaded the growth of the social economy in the city over the past decades remains deeply rooted and as this paper is being written, the mobilisation of civil society actors, and particularly youth, in favour of an ecological and social transition that is transforming the dominant development model is opening the door to a new growth spurt in Montreal's social economy.

## Summary of All Policies, Actions, and Programmes

**Table 11. Summary of All Policies, Actions, and Programmes**

Responsible Body	Name of Policy	Year	Description	
F e d e r a l	Ministry of Infrastructure and Communities	Smart City Challenge	2017	The City of Montreal was awarded CAD 50 million. LIUM (Montreal Urban Innovation Laboratory) within the City coordinates this initiative in collaboration with social economy organizations in mobility and sustainable food systems.
	Federal Budget 2018	Social Finance Fund	2018	The federal government made a commitment of CAD 750 million over the next decade. An initial CAD 50 million has been committed to an investment readiness programme for social enterprises. The Chantier de l'économie sociale has been given the mandate to manage the Quebec portion of this fund (CAD 8 million).
	Canada Mortgage and Housing Corporation	UTILE	2019	The federal government invested CAD 3 million to support the construction of up to 3 buildings that would house over 160 affordable rental units. The Chantier de l'économie sociale Trust collaborated with UTILE to establish a CAD 10 million investment fund called the <i>Fonds d'investissement en logement étudiant</i> (FILE).
P r o v i n c i a l	Civil Code of Quebec	Social Utility Trusts	1994	First introduced in the reform of the Civil Code of Quebec (C.C.Q.) in 1994, a social utility trust is not a legal person, but a juridical form and a legal contract which assigns a social purpose to a patrimony. Social economy actors are currently promoting the development of social utility trusts in rural and urban settings for the perpetual protection of real estate or land against speculation, under a collective form of governance.
	Ministry of Municipal Affairs and Regions	Government Action Plan on Collective Entrepreneurship	2008	The first social economy action plan before the framework legislation in 2013. It advanced the recognition of the social economy as an important tool for territorial development requiring inter-ministerial support.
	Investissement Quebec	Capitalization Programme for Social Economy Enterprises	2011, 2015	In 2011, CAD 3 million was allocated. In 2015, the programme was renewed, with an increased envelope of up to CAD 30 million between 2015-2020.
	National Assembly	Social Economy Act	2013	The Act recognizes the role of the social economy and its two principal interlocutors, the Chantier and Conseil québécois de la coopération et de la mutualité (CQCM) in the socioeconomic development of Quebec. It provides a co-constructed legal definition of the social economy.
	Ministry of Economy, Innovation, and Exportations	Governmental Action Plan for the Social Economy (PAGÉS)	2015	Key objectives include : building the capacity of social economy enterprises; promoting their growth; facilitating their access to markets and to social finance. The Action Plan allocated a budget of CAD 100 million for the 2010-2015 period.
	Ministry of Economy and Innovation	Collective Entrepreneurship Immobilization Program (PIEC)	2015	The programme supports collective enterprises with the acquisition of property, construction, or renovation, with an envelope of up to CAD 20 million between 2015-2020. It was renewed in 2015 as part of the PAGÉS.

	<b>Ministry of Municipal Affairs and Housing</b>	<b>Fonds d'initiative et de rayonnement de la metropole</b>	2014	In 2014, the MMAH launched a Call for Projects exclusive to social economy enterprises with a total envelope of CAD 600,000, ranging between CAD 50,000 and CAD 75,000 per project. Currently, the programme does not offer an exclusive call for projects, but is still available to social economy enterprises.
	<b>Ministry of Environment and Climate Change</b>	<b>Quebec Government Sustainable Development Strategy</b>	2015	Identifies supporting the development of social economy enterprises that are working towards the transition to a green and responsible economy (Objective 2)
	<b>Ministry of Municipal Affairs and Territorial Occupation</b>	<b>Territorial Development Fund (FDT)</b>	2015	An agreement between MAMOT and the City of Montreal allowed the latter to use the FDT according to its identified priorities. For 2018-2019, the MAMOT contributed CAD 8.7 million to the FDT with an additional contribution of CAD 1.5 million by the City. See PME MTL (FDT) below for specific funds.
	<b>Ministry of Labour, Employment, and Social Solidarity</b>	<b>Action plan on sustainable development 2016-2020</b>	2016	Identified supporting the development of the social economy in Quebec as one of its goals, including the training of 3,400 homecare workers by 2020.
	<b>Ministry of Economy, Science, and Innovation</b>	<b>Action Plan on Entrepreneurship (PAGE) 2017-2022</b>	2018	The Action Plan allocates a total envelope of CAD 345.7 million over five years for the growth of Quebec economy with CAD 4.7 million designated for collective entrepreneurship. The Chantier received CAD 180,000 (2018-2021) to support initiatives with significant potential impact ( <i>projets structurants</i> ).
	<b>Statistics Quebec</b>	<b>National Statistical Portrait of the Social Economy of Quebec</b>	2019	Based on 2016 data, there are more than 11,000 social economy enterprises in Quebec, of which 2,780 are in Montreal, with a gross revenue of CAD 47.8 billion, employing over 220,000 people.
<b>Municipal</b>	<b>City of Montreal</b>	<b>ECPAR</b>	2007	Montreal is an active member of ECPAR. <sup>43</sup>
	<b>City of Montreal</b>	<b>A Social Economy Partnership for Community-Based Sustainable Development (2009)</b>	2009	Established official recognition of the contribution of the social economy to answering some of Montreal's key challenges. <sup>44</sup>
	<b>Social Development Division</b>	<b>Creation of Social Economy Office</b>	2009	The mandate of the social economy was initially assigned to the Division of Housing and subsequently transferred to the Economic Development Division.
	<b>City of Montreal</b>	<b>GSEF</b>	2013	The City has been a member of the Global Social Economy Forum since 2013 and has hosted the third edition in Montreal in 2016. The City has also supported a Montreal delegation to attend GSEF Bilbao in 2018.
	<b>City of Montreal</b>	<b>Espace Lafontaine; Ecosol</b>	2013 (2011)	Social economy enterprises offer food services in public spaces. Espace Lafontaine operates a restaurant in Parc Lafontaine (2011) and Projet Sol (2013) offers food services at the planetarium.

<sup>43</sup> See Section 5. Access to Market for details on ECPAR.

<sup>44</sup> *Un partenariat en économie sociale pour un développement solidaire et durable*, Ville de Montréal (2009), 4-5.

City of Montreal	Économie sociale, j'achète!	2013	An initiative by CESIM. Supports social economy enterprises in their business development and collaboration with the public and private sectors. Encourages public institutions and large corporations to purchase from local social economy enterprises.
City of Montreal	PRaM – Économie Sociale	2014	A financial assistance programme for owners and tenants of buildings that house social economy enterprises, with a budget of CAD 3.2 million over four years, from 2014 to 2017.
City of Montreal	Sustainable Development Action Plan 2016-2020	2015	Committed to improving the “Responsible procurement”.
City of Montreal	Faire Montréal	2015	An online platform which introduces projects around the city related to innovation, and socioeconomic development. Many of these projects are part of the social economy.
PME MTL (FDT)	Fonds de développement de l'économie sociale (FDES)	2016 (1997)	A pre-existing fund restructured under PME MTL in 2016. Supports the development of social economy enterprises, offering subsidies ranging from CAD 5,000 to CAD 50,000.
PME MTL (FDT)	Fonds d'investissement PME MTL	2016	Available to all forms of businesses, including social economy enterprises. 1. Fonds locaux de solidarité Montréal: loans up to CAD 100,000. 2. Fonds PME MTL: loans up to CAD 300,000.
Montreal City Council	Food Policy Council; Système alimentaire de Montréal (SAM)	2016	Works on developing a food system for Montreal with a focus on vulnerable populations. The operating body, SAM ( <i>Système alimentaire Montréal</i> ), works closely with social economy organisations to deliver its projects.
City of Montreal	Accès-Logis Montreal	2016	In 2016, Montreal was given the full responsibility for the management of provincial funds for social and community housing and established Accès-Logis Montreal, a new municipal programme with the same structure, mission and clientele as the provincial Accès Logis but is better adapted to the Montreal context.
Montreal International	C.I.T.I.E.S.	2017	Established during GSEF 2016 held in Montreal. Facilitates knowledge transfer in the social economy between regional municipalities. Received base funding from the City through Montreal International.
City of Montreal (Social Innovation Team)	Action Plan for Social Innovation 2018-2022	2018	Acknowledges the need to support the social economy of Montreal, to promote entrepreneurship. In particular, the City will increase access to the market by changing its procurement practices. Furthermore, the City commits to support the participation of Montreal actors in international forums on the social economy.
Borough of Montreal-Nord	Plan collectif de développement économique de Montréal-Nord 2018-2023	2018	Identified the social economy as one of its priorities in economic development. Specific goals to attract SE enterprises are to: - implement a diversification programme for the social economy - offer <i>accompagnement</i> (coaching) for pre-start up social economy enterprises - organize a forum on the social economy in Montreal-Nord

	<b>City of Montreal</b>	<b>Responsible procurement policy</b>	2019	Replaces the City's previous procurement policy of 2015. Commits the City of Montreal to favour social economy enterprises within regulatory limitations on bidding for public contracts.
	<b>City of Montreal</b>	<b>Réno logement abordable</b>	2020	The programme provides per unit up to a maximum of CAD 500,000 per building. To be eligible, property owners must provide low cost housing for one-third of its occupants. Social economy housing is eligible.
	<b>City of Montreal</b>	<b>Right of First Refusal</b>	2020	The City of Montreal will use its right of first refusal on land for sale that can and will be used for low cost housing and has committed CAD 50 million to this initiative.

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