

# Social innovation and development policies: the case of Land Exchange (Bolsa de Terras)<sup>1</sup>

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Social innovation policies have sparked extensive discussions on the future of European socio-economic development, despite there being very few studies that link them to the question of territorial development. This paper analyzes how social innovation initiatives encourage the development of policies capable of boosting territorial development. The case study, which is based on a qualitative analysis, describes the experience of the *Bolsa de Terras* (Land Exchange). The Land Exchange was created within the field of social economy in order to make use of abandoned land and was transformed into a national policy in Portugal. The research shows that initiatives of social economy are mechanisms able to generate more sustainable local support systems. They also show that the network structure, based on cooperation, appears to be a key mechanism in fostering social innovation policies.

**KEYWORDS:** territorial development; social economy; social innovation; public policies.

## **Políticas de inovação social e desenvolvimento: o caso da Bolsa de Terras**

Políticas de inovação social têm dinamizado vastas discussões sobre o futuro do desenvolvimento socio-econômico europeu apesar dos poucos estudos que as relacionam com o desenvolvimento do território. Este artigo analisa como iniciativas de inovação social suscitam o desenvolvimento de políticas capazes de dinamizar o território. O estudo de caso, fundamentado por uma análise qualitativa, descreve a experiência da Bolsa de Terras que, tendo sido gerada no campo da economia social, com o objetivo de tornar úteis terras abandonadas, se transforma em uma política nacional portuguesa. Os resultados mostram as iniciativas de economia social como um motor econômico capaz de gerar sistemas de apoio local mais sustentáveis e identificam que a estrutura de rede, mediante a cooperação, aparece como o principal mecanismo na fomentação de políticas de inovação social.

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DOI: <http://dx.doi.org/10.1590/0034-7612151759>

Article received on July 7th 2015 and accepted on July 18th 2016.

<sup>1</sup> This research had financial support from Fundação para a Ciência e a Tecnologia (FCT/MCTES), Portugal.



**PALAVRAS-CHAVE:** inovação social; economia social; desenvolvimento do território; políticas públicas.

### **Políticas de innovación social y desarrollo: el caso de la Bolsa de Tierras**

Las políticas de innovación social han estimulado amplios debates sobre el futuro del desarrollo socio-económico europeo a pesar de pocos estudios que las relacionan con el desarrollo del territorio. Este artículo examina cómo iniciativas de innovación social suscitan el desarrollo de las políticas capaces de apoyar el territorio. El estudio de caso, basado en un análisis cualitativo, describe la experiencia de la Bolsa de Tierras que fue generada en el campo de la economía social, con el objetivo de hacer útiles tierras abandonadas, convirtiéndose en una política nacional portuguesa. Los resultados muestran las iniciativas de la economía social como un motor económico capaz de generar sistemas de apoyo local más sostenibles e identifican que la estructura de la red, a través de la cooperación, aparece como el principal mecanismo para el fomento de políticas de innovación social.

**PALABRAS CLAVE:** desarrollo del territorio; economía social; innovación social; políticas públicas.

## **1. Introduction**

In the last decade, the theme of social innovation appears with significant frequency in many areas of knowledge, in addition to the renewed interest in studies in the social sciences, particularly in social and economic development (Murray, Caulier-Grice and Mulgan, 2010). The increasing use of the term social innovation has brought different meanings and therefore concepts with different interpretations. It is possible to find a variety of concepts that define social innovation, which range from a simple procedure (for example, advancing specific services) to collective practices following a revolutionary path often associated with protests with high impact (Igot-UL, 2015:18).

Mulgan et al. (2007:148) studied social innovation practices, and defined them as “a set of novel ideas (e.g., products, services or action models) that satisfy human needs and promote new social relations, not only to benefit society but also enhance its capacity to act.” Moulaert et al. (2013) identify social innovation regarding the role of social action in bottom-up governance dynamics and in capacity building. These authors also emphasize the dimension of relationship that social innovation brings in communities, connecting traditional patterns of community life to the logic of collective efficiency. In the dimension of social relations, Klein et al. (1998) considers social innovation as a new source of social transformation and healthy engine for change in the territory, which, according to Mulgan et al. (2007), tends to generate experiments of social innovation policies.

For Lévesque, Bourque and Forgues (2001), the study on social innovation has to do with space/territory and is related not only to the areas that consider the territory as an ideal object of study (such as geography and economy), but also with economic sociology. Regarding the term space/territory, this research refers to the thoughts of Milton Santos in his work *A natureza do espaço*, which clarifies that “in terms of meaning and reality, one cannot be understood without the other, and, in fact, one does not exist without the other”

(Santos, 2006:66). In *O retorno do território*, Santos argues that “territories are shapes, but ‘used territory’ is object and action, it means human space, living space” (Santos, 2005:255). In addition, this idea is complemented by Henri Lefebvre – *La production de l’espace* — “The (social) space is a (social) product. [...] Its base is nature or physical space, which the human changes with their work” (Lefebvre 1979:25). In the same line of thought, it is worthwhile to mention Claude Raffestin — *For powerful geography* — who wrote “space is a place or a field of possibilities, [...] the territory is based in space, but is not the space. It is a production from space” (Raffestin, 1993:144).

Moulaert and Sekia (2003) and Bellemare and Klein (2011) note that there is a huge gap in the literature on the role of social innovation and the development of territory. Moreover, because it is a recent issue, social innovation presents a wide dimension of analysis (Klein et al., 2009). Social innovation presents definitions, theoretical perspectives and analysis tools that differ from one research area to another. This dimension has spread from the scientific to the political field.

This debate is increasing at the European political level, especially with the impact of the current crisis that is affecting a significant part of society, but has also led to increased cooperation and sharing of resources. In the European Union, “social innovation is a central element in the Europe Strategy 2020. The purpose of this strategy is to address the weaknesses in the European growth model and create conditions for smart, sustainable and inclusive growth” (CE, 2013:6). Giving priority to these three vectors of strategy, smart growth means developing an economy based on knowledge and innovation; Sustainable growth promotes a more efficient economy in terms of resources, being greener and more competitive; the inclusive growth priority adds to an economy with high employment that has social and territorial cohesion (CE, 2013). The strategic plan — Europe 2020 — encourages and supports innovation policy as an instrument of response to socioeconomic concerns regarding sustainable territorial development, recognizing that social innovation tends to generate ideas and good practices in solving a particular social problem, especially regarding the employment crisis (CCE, 2010).

In this context, social innovation is studied from many angles. Fontan (2008) identifies social innovation as a creative act, and a creative act may be the result of chance, since it can result from a social construction. The author notes that the innovation process needs adequate space in creation, invention or discovery. Social innovation, seen as a creative act, may be a product or process of innovation, new knowledge or new social or political technology leading to the institutionalization of a novelty (Rodrigues and Barbieri, 2008).

For Klein et al. (2012), social innovation is a new creativity element arising from cooperation and active participation of citizens’ initiatives, able to create participatory policies that emerge as proposed solutions to negative circumstances, such as the financial, economic, social and environmental crisis. Usually coming from social economy initiatives, social innovation represents the continuous to do, presented itself as a solution to the problems not met by the market or by the State in the short, medium and long term (Moulaert et al., 2013.); this cycle tends to move the territorial economic system (Klein and Tremblay, 2013).

Thus, social innovation gains reticular support formed by different actors that foster and support innovation in order to become a public policy that make a more dynamic development of the territory. Cooperation of actors highlights the collective intelligence and the production of knowledge from the social experimentation that acts on behalf of relevant changes regarding the dimension of the public policy, providing consistency to the aspect of territoriality<sup>2</sup> in social innovation.

The studies by Moulaert et al. (2009, 2013), Klein and Harrisson (2007) and Fontan, Klein and Tremblay (2005) identify social innovation as an enabler for sustainable territorial development. Therefore, the aim of this study (in a necessarily summarized way) is to present which mechanisms transform new ideas into socioeconomic dynamics and how innovative actions promote public policies. In order to respond to the research question and contribute to the knowledge of the field, this study aims to analyze how social innovation initiatives, triggered by the experience of Land Exchange in Sever do Vouga, raises smart and inclusive growth policies capable of boosting the development of the territory. This objective will be pursued by studying: (i) the actors' skills related to sustaining the creation of successful social innovation; (ii) the ways to encourage and support social innovation in order to become a public policy; (iii) how innovative social economy initiatives operate on solving socioeconomic problems and on improving the dynamic of the territory.

In this context, territory is understood as 'used territory' in the sense explained by Milton Santos. Territory formed materially and immaterially as a complex whole, which includes all the actors, all existences, all aspects, all objects and all actions; as the place of the exercise of life, "place of residence, of life and of material and spiritual exchanges, over which the used territory has influence" (Santos, 2000:46, 2005, 2006).

For this research, social innovation is a phenomenon that emerges from the initiative of several actors who, when acting in a network, present new social practices and cooperate in the creation of public policies (Mulgan et al., 2007). Moreover, social innovation has an important effect on the development of the territory by providing employment, income and entrepreneurship, and boost the local economy (Klein and Tremblay, 2013).

Considering the aspects mentioned above, the next section presents the theoretical framework underlying the case study of the Land Exchange (Bolsa de Terras) in Sever do Vouga, a city located in the district of Aveiro, Portugal. The case study will base an analysis on the concepts of public policy, social innovation and territorial development, as well as social economy as a field for social innovation initiatives and development of the territory.

The other sections will present the methodology used in the construction of the case study with the framework of analysis, as a tool that will support the description of the qua-

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<sup>2</sup> The expression is used based on the research by Claude Raffestin. The author says that "territoriality assumes a particular value, because it reflects the multidimensionality of 'territorial being' of members of a collective, of societies in general. People live at the same time the territorial process and the territorial product, through a system of relationships and/or production" (Raffestin, 1993:158).

litative analysis of the research. After that, final considerations will be drawn as well as the contribution of this study in the field of innovation policies and development of the territory.

## 2. Public policies and the role of different actors

Howlett and Ramesh (2003) provide a literature review on the definition of public policies in their work *Studying public policy: policy cycles and policy subsystems*. The authors conclude that agreement on the subject is around the idea of public policies resulting from decisions made by governments in order to both maintain the *status quo* and to modify it.

The definition of public policy summarized by Thomas Dye is “everything a government decides to do or not do” (1972:2 apud Howlett and Ramesh, 2003:5), has two strong points. The first point is that the definition clearly specifies that the public-policy-making agent is a government. It refers to actions of government, but does not mean that the activities of the non-governmental actors do not influence what governments do. A second point is that Dye considers that public policies involve a fundamental decision by governments, namely: to do or not do something.

In their literature review, Howlett and Ramesh (2003) cite Jenkins, who defines public policy in a more accurate way: “a set of interrelated decisions made by a political actor or group, which refers to the selection of goals — and means to achieve them — in a particular situation in which the target of these decisions would be achievable for the actors” (Jenkins, 1978 apud Howlett and Ramesh, 2003:6). Jenkins explicitly sees public-policy-making as a process; Dye however sees it as a choice. Another aspect raised by Jenkins is that public policy involves a series of decisions — interrelated — that constitute a policy.

Jenkins perfects Dye’s definition especially when introducing the idea of public-policy-making as a behavior oriented by governments — decisions made by governments — to achieve goals in a concept that gives importance to defining the goals and the specific means to achieve them (Howlett and Ramesh, 2003).

James Anderson is presented by Howlett and Ramesh (2003) as an author with a definition that lies between those of Jenkins and Dye. Anderson describes politics as “an intentional course of action pursued by an actor or set of actors, when dealing with a problem or a subject of concern” (Anderson 1984:3 apud Howlett and Ramesh, 2003:8). For the authors, this definition has the strong point of emphasizing the relationship between government action and the existence of a problem and its resolution.

In political science, the literature on policy analysis distinguishes three dimensions of policy: policy, politics and polity. The concept of policy refers to the policy content — its concrete material result — and involves setting up political programs, technical problems and the material content of political decisions. Politics refers to the political processes — political negotiation — often presenting conflicts regarding the imposition of goals, the content and the decisions on distribution. Finally, polity refers to the political structure and political institutions; it refers to the order of the political system outlined by the legal system and institutional

structure of the political-administrative system. For Frey (2000), these three dimensions of policy are interrelated and influence each other. For the analysis of public policies, all must be considered: the analysis of policy contents (policy), the institutional dimensions (polity) and procedural dimensions (politics).

The above definitions agree that public policy is a complex phenomenon involving many decisions by many individuals and organizations that are part of a government. Souza (2007) argues that, despite the different approaches, the definitions tend to assume a holistic view of the subject, and the individuals, institutions, interactions, ideologies and interests should be taken into consideration even when there are differences on their relative importance.

In this sense, Frey (2000:221) proposes the concept of policy network, as the interactions of the different institutions and groups in the creation and implementation of a particular policy. In the field of policy network, social networks play an important role in the development of territories because they may influence the development of public policies and structure relations (and interpenetration) between the public and private fields (Marques, 2003).

A national public policy depends on multiple networks between formal organizations. These links allow opposing coalitions to mobilize political resources in collective causes in order to influence specific decisions of public policy (Knoke, 2007). There is a common understanding of political networks and power relations between government and interest groups, in which resources are exchanged (Börzel, 1997). These networks can be understood as a relatively stable set of relationships. Their nature is not hierarchical and interdependent, they unite a variety of actors who have common interests regarding a policy and who exchange resources in order to meet those interests, actors that recognize cooperation as the best way to achieve common goals and solve problems. A policy network includes, therefore, all the actors involved in the creation and implementation of a policy in the public sector. In this context, social innovation has been gaining importance applied to social relations centered on cooperation, often as a form of response to basic needs, and including the role of the state in response to public policies.

In the context of public policy, social innovation describes the process by which new responses to social needs are developed in order to deliver better social outcomes. This process consists of four main elements: identification of needs that are new, unmet or inadequately met; development of new solutions in response to these social needs; evaluation of the effectiveness of new solutions to meet social needs; intensification of effective social innovations. This is how social innovation will be addressed in this work, focusing mainly on its application to public policies and to what extent public policies promote social innovation and territorial development.

### **3. Social innovation and territorial development**

Social innovations seek to address socio-economic problems, usually with a strategic initiative that identifies and provides new processes, products and/or services that improve the quality

of life of social actors. These strategic initiatives impact on the development of the territory, tending to be ideas that create new arrangements in social relations, such as the implementation of new processes to integrate individuals in the labor market, to promote intergenerational or gender relations, increase civic participation (Moulaert et al., 2013). These authors identify social innovation in three dimensions of development of the territory: (i) content: an original response to unmet human needs, or needs that were not identified by the market or by the state; (ii) process: changes in social relations regarding equal opportunities, social justice and people's autonomy, promoting inclusion and social cohesion; (iii) empowerment: increasing social and political capacity and access to resources needed to strengthen rights to meet needs and to engage in social collective participation in public policies.

For Moulaert et al. (2005), social innovations arise because of difficulties or new opportunities. They require, in both cases, a type of response that underlies the collective participation, structured through social relations that respect the common interest, in activities that contribute to achieving the objectives of the development of the territory. This response may be institutionalized as a policy of development of the territory, through a socially innovative action, i.e., a new social practice, a change of habit reconciled by its diffusion and distribution in the territory.

This was also the argument that Cloutier (2003) used regarding social innovation in the territory, identifying it as a change of habits, attitudes, aimed at improving people's lives and marked by conscious consumption and the development of the territory. Social innovation in the consumer awareness approach is still considered an idealistic behavior, particularly in aspects of social, environmental and non-market consumption, among others. According to Cloutier, the territorial development approach especially involves the actions and activities for the sustainability of the territory. Thus, Cloutier (2003) considers social innovation in the territory as aimed at collective well-being through attitudes, actions, products or processes that meet pressing local problems and generate autonomy and power to social actors.

According to Fontan, Klein and Tremblay (2004), this change of attitude that creates innovative social actions, arises from the social actors' awareness. They distinguish an unacceptable real situation of an unsatisfactory momentary situation, and act in order to promote the necessary and desirable changes, relevant to society. These social actions, usually in micro-scale, are implemented locally and represent social innovation in the territory. These are actions that begin in the territory and create the possibility to develop new services, new processes, new products and promote entrepreneurship (Fontan, Klein and Tremblay, 2004). Many of these enterprises are initiatives of social economy qualified as social innovation that are linked by a reticular system, whose social relations, pervaded in cooperation, reciprocity and solidarity, contribute to the development of the territory (Fontan, Klein and Levesque, 2003; Lévesque, 2008).

Several studies on social innovation (products and/or services in a given context) have the potential to be replicated and reproduced (Albaigès et al., 2009; Murray, Caulier-Grice and Mulgan, 2010). Many of these social innovations originate from "social movements that seek to fill gaps left by the state's retraction or inaction" (Bignetti 2011:5). In this scenario,

according to Murray, Caulier-Grice and Mulgan (2010), it is possible to understand the importance of social innovation regarding why the structures and global policies do not appropriately meet the most urgent social issues such as environmental issues and social inequalities.

Social innovation, according to Mulgan et al. (2007:8), has a simple and concise concept: policy implementation. In this sense, they argue that social innovation is composed of activities and services that arise in order to meet a required social policy (Mulgan et al., 2007). The authors are interested in innovations that take the form of programs or organizations working with new ideas to fulfill social goals.

According to Klein et al. (2009), social innovation means creating better ways, actions and/or participatory policies that, at the initiative of citizens, enrich the process that seeks to solve a problem in order to protect the social integration of the area/territory. According to the authors, these are actions designated to create new social structures, i.e. provision or organization in which the parties are dependent on the whole and therefore work in solidarity with each other. These actions favor the organization of new sociability networks and, when facing problems, these networks seek original decisions that results in the autonomy of the social actor and/or the local community. In addition, Klein et al. explain that the challenge for these socially innovative actions is to perform the innovation process autonomously and according to the demands of stakeholders. Thus, the innovative actions could strengthen both public policy and the actions of the private sector, which have purposes in urban and rural areas and have effects on quality of life and the local economy, but which are outside the interest of the public and private sectors.

The development and commitment to the development of the territory refer to the types of relationships that social economy initiatives keep in their production chain (Moulaert and Sekia, 2003). This condition concerns the quality of coexistence between the social economy initiative with other links in the network, that is, with its institutional partners and all stakeholders. Therefore, the innovative social economy activities develop in order to assist existing structures and established policies that are unsatisfactory in eliminating the most pressing contemporary problems (Albaigès et al., 2009).

#### **4. Social innovation experiences in social economy**

According to Jahier (2012), social economy is a dimension of action that contributes significantly to job creation, sustainable growth and fair distribution of income and wealth. The author suggests that it is a social process of production, commercialization and distribution of goods and services that can be arranged in various ways such as systems, associations, cooperatives and others. With multiple economic activities, social economy provides income through the redistribution of surplus sharing of goods and services and solidarity, i.e., “not pursuing profit or being dominated by purely individualistic interests, aimed at service and community development” (Cases, 2014:6).

Monzón and Chaves (2012) consider that this area of activity has gained strength from a more traditional view of social economy for organizations that are increasingly dynamic and wretched in concrete challenges. Jahier (2012) adds that it is a multifarious space, having the ability to combine profitability with social inclusion to form links with democratic systems of governance. Fundamentally, it is a group of activities that, different from other sectors, has bypassed the economic crisis and has gained increasing recognition in Europe (Jahier, 2012).

In this context, Bouchard (2013) notes that the social economy is ascending and its innovative dynamic is clear in the point of views of the scientific analysis and public authorities. This strengthens the debates around social economy activities and highlights its importance and potential for development. The innovative, economic and social potential of this area of activity can be seen as a solution to the eco-socio-economic<sup>3</sup> crisis as well as a tool for positive change in the development of the territory.

Thus, the social economy is an arena where several socioeconomic agents can participate in order to contribute to solve these problems. Therefore, the social economy covers extensive space of activities such as local development associations, farmers associations and cooperatives, employment assistance services, vocational training and entrepreneurship, environmental improvement, etc. Although organizations may be administered as efficient businesses, their main interest lies not in profit maximization, but in social skills and in the process of creating new ways of working (Laville, Lévesque and Mendell, 2006).

The social economy thus marks the economic activity “which is not restricted to mobilize commercial resources, but also takes into account the construction of a plural economy from the territory and of a democracy that is open to citizen participation” (Lévesque, 2009:124). Thus, the social economy initiatives are based on principles that meet the needs of the territory. In this sense, it is about effective cooperation, interdependence and active participation of citizens in social and economic well-being of the communities that are part of the territory (Lévesque, 2009). Its actions work in (re)creating a more equal, inclusive and democratic society, promoting social justice and equity of rights (Monzón, 2003).

Favreau (2005) points out that, historically, the social economy has proven to be a collective and social mobilization action, characterized by three dimensions. First, the socio-economic needs of the population (needs). Second, there is the ideal of the social web that seeks to establish its own identity (identity). Third, the collective interest of sharing a project of a democratic and fair society (interest). Mobilization is generally made upstream and downstream of the social movements, which move the economic activities that combine initiatives of solidarity, proximity and trust.

Thus, social economy strength is on the working classes who have always sought to improve their working conditions. The cooperation is combined to the need, and the needs and interest creates a first dimension of socio-economic nature, producing a framework of analysis

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<sup>3</sup> Eco-social-economy, according to by Ignacy Sachs (2007), is understanding that the development is in equilibrium with economic growth, equitable improvement of the welfare and environmental protection.

to better understand current social economy (Favreau, 2008). The author clarifies that the collective identity of the social actor is beyond belonging to the same group; the identity is embedded in the common goal of living together, therefore, achieving democracy and collective well-being from the association and cooperation.

In this vein, the social economy environment involves a set of people that work to introduce, democratically, a new relation to a more humane, social and solidary economy. This collective action, characteristic of social economy initiatives, aims to work out a model of democratic organization and do business differently in social, economic and political dimensions, making them more innovative and committed to the development of a sustainable territory (Bittencourt, 2014).

## 5. Methodology and procedures

The research is qualitative, exploratory and descriptive, based on a single case study built with primary and secondary data. When explaining the dynamics and implementation of the case of the Land Exchange in Sever do Vouga, the goal is to deepen the understanding of social innovation policies and territorial development. The case study is a strategy to organize data, preserving the individual characteristic of the studied object (Llewellyn and Northcott, 2007). It considers the single unit as a whole (Yin, 2001) and its development (social actor, community, workplace, set of relationships or process etc.).

In order to address the research questions, a framework of analysis was built based on the theoretical background presented previously. Based on that, the authors identified indicators and analytical categories that will be processed and analyzed from the collection of secondary data (documents and information in mass media) and primary data (semi-structured interviews), as shown in chart 1.

Chart 1  
Framework of analysis

Guiding concept	Author	Context	Indicator	Category
Public Policy	Dye, 1972; Jenkins, 1978;	Public-policy-making. Intentional action.	Policy, real material result.	Political actor (Government).
	Anderson, 1984 (apud Howlett and Ramesh, 2003)	Decisions related to the elaboration of public policies.	Policies content. Polity, political structure and political institutions.	Relationship among several actors (social, political, economic).
	Frey (2000)	Policy network.	Politics, political negotiation. Process dimension.	
	Howlett and Ramesh (2003)	Holistic vision.	Social networks.	
	Marques (2003)			
	Souza (2007)			
	Börzel (1997)			
	Knoke (2007)			

*Continue*

Guiding concept	Author	Context	Indicator	Category
Social Innovation	Albaigès et al. (2009) Cloutier (2003) Fontan et al. (2004) Klein et al. (2009) Moulaert et al. (2010) Moulaert et al. (2013) Mulgan et al. (2007) Murray et al. (2010)	New concept and procedures that demand little investment. Simple features in response to challenges presented from local reality and specific problems.	Action, strategy, process, product or innovative service to solve a collective local problem. Innovative initiatives to promote entrepreneurship. Approval and use of innovative achievements by interested social actors. Strategic relations of solidarity and reciprocity.	Social actor. Collective actor. Relationship between stakeholders (Public and private organizations and organizations of social economy).
Social Economy	Bouchard (2013) Favreau (2005; 2008) Jahier (2012) Lévesque (2009) Monzón and Chaves (2012)	Multifarious space of cooperation that contributes to create jobs and labor opportunities. Forms an effective cooperation by establishing connections with the private sector and democratic systems of governance.	Collective mobilization action in order to address the social and economic needs of the population. Identification with the social issue. Collective interest that addresses the needs of the territory.	Collective actor. Sociability relations (initiatives of the social economy, production chain, institutional partners).

Source: Elaborated by the authors.

The sample was obtained by searching for an initiative of social economy with innovative features, which supports and/or produces goods and services that promote the development of the territory. The selection consisted of two processes. Firstly, the choice was made by random process using the following criteria: a) organizations providing an environment of creativity and social innovation and adopting assumptions of cooperative freedom; b) organizations committed to spreading techniques and methods related to social innovation policy and sustainable territorial development. The second process involved the authors choosing, among the group of pre-selected initiatives, the one with greatest visibility in the media (between 2012 and 2013), at the national level. Through this process, the case of the Land Exchange implemented by the Association for Management, Innovation and Modernization of Sever do Vouga Urban Centre (Agim) was chosen.

Meanwhile, the semi-structured interview for data collection was prepared and the actors to be interviewed were selected. The target interviewees were individuals connected directly to the idea, and involved in the elaboration and implementation of the public policy. Four subject matter experts in the field have validated this step through pre-test interviews. The interview's script presented three interrelated sections, which correspond to the research's guiding concepts (see chart 1).

A total of 10 interviews were conducted, forming a group of social economy and social innovation experts, members of AGIM, public officials, and entrepreneurs, actors who are

connected to the development, deployment and implementation of innovation. Interviews were conducted from July 2012 to July 2013, and were recorded with the consent of the participants.

Together with the interviews, a document analysis was conducted verifying 70 documents made available by AGIM (online, official newspapers and others). In order to give greater strength to the research, the authors followed up the case until August 2014, particularly in the mass media.

The case study was built from the interviews and the data collected and analyzed. The respondents identities are preserved and alphanumeric symbols are used to refer to them: A1 (coordinator of Agim), A2 (Agim's manager), B1 (Mayor of Sever do Vouga) B2 (public manager), C1 (CEO, private company), D1 (Foundation's manager), referring to respondents. The symbols E1, E2, E3, E4 refer to experts (teachers, researchers in the field of social economy and social innovation).

In order to achieve the goals of the study — to analyze how social innovation initiatives, triggered by the experience of Land Exchange in Sever do Vouga, raise the smart and inclusive growth of policies able to boost development in the territory — the case study is presented below.

## **6. The Land Exchange (Bolsa de Terra) in Sever do Vouga: process of social innovation in the territory**

Sever do Vouga is a city in the district of Aveiro. It had a total on 13.183 inhabitant residents, according to the 2011 Census (INE),<sup>4</sup> and presented high depopulation and aging population. The economically active population is distributed 7.45% in primary sector, 53% in secondary industry 39.5% in the tertiary sector (Census, 2011).<sup>5</sup> Farming is characterized by small farms and the workforce is predominantly female. Farming is developed according to geographic variations on the land, characterized by terraces,<sup>6</sup> in which traditional agricultural techniques are used. Thus, it is characterized as subsistence agriculture (B1). The climate in Sever do Vouga is characterized by microclimate that favors the cultivation of small berries such as blueberries, blackberries, raspberries and blackcurrants, contributing thereby to the natural vocation of the territory.

As an organization of social economy, the Association for Management, Innovation and Modernization of the Urban Center of Sever do Vouga (Agim) is considered a key player in this work. Agim is a private nonprofit organization founded in 2006 by the city Sever do

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<sup>4</sup> Instituto Nacional de Estatística. Censo 2011. Available at: <[www.censos2011.ine.pt](http://www.censos2011.ine.pt)>. Accessed on: 7 jan. 2013.

<sup>5</sup> Ibid.

<sup>6</sup> "Terrace" or "socialcos" refers to the type of the land. It is a piece of land more or less horizontal. It is similar to a step in the hills were it is possible to farm, supported by a wall.

Vouga and the Business Association (Sema).<sup>7</sup> The foundation of Agim was given, under Order Nº 26.181/2006 — System for Incentive of Projects on Commercial Urbanism —, an initiative of Urbcom<sup>8</sup> program, under the guidance of the Ministry of Economy and Innovation (A1).

The association focuses on: *i*) enhancing of endogenous resources; *ii*) boosting local commerce; *iii*) promoting investment and entrepreneurship; *iv*) cooperation with public administration.<sup>9</sup> Agim aims to encourage and support strategies for the development of the territory (B2). In this context, the association develops and promotes the production chain of small fruits with the mission of putting the agricultural production of small fruits in a prominent position at the national and international level; therefore seeking to promote greater profitability of production and increase the added value of these products (A1).

Agim, as a space for cooperation, carries out the role of policy network. It forms an effective cooperation to establish links with the political actor (City Council, State and European Union), social actor (associated people, civil society) and collective actor (business associations, cooperatives, educational and research institutions) in order to foster and/or support ideas that can meet the needs of the territory. However, during the process it was observed that there were, in many moments, disputes and conflicts around the innovation strategies.

The idea of the Land Exchange (Bolsa de Terras) was born in the context of Agim (social economy environment), during a discussion around innovative strategies aimed at tackling the problem of unemployment in the territory (A2). It was a discussion related to procedures in the field of public policy, and it was led by Agim, involving A1 (collective actor), B1 (political actor), C1 (social actor) and D1 (collective actor). The discussion aimed to generate actions that implement lasting solutions for 03 pressing situations present in the reality of the territory. First, the need to bring young people to live in the territory. Second, the lack of job opportunities for young graduates and/or the unemployed due to the current scenario of socio-economic and financial crisis. Third, the need to stem the rural exodus and desertification of the interior and the abandonment of land (A1, A2). From there, other meetings eventually characterize an intentional course of action in which the actors realized, from these problems, the opportunity to engage young farmers for blueberry plantation, through the creation of a Land Exchange (A1), a utopian ideal (E3).

According to the explanation of (C1), the concept of the Land Exchange is based on putting abandoned land to good use, with the purpose of giving opportunity to those with interest in farming to undertake a business. At first, the idea was simple and emerged as a “public bank/stock market of land”. It was launched by a public petition via the Internet in November 2010,<sup>10</sup> to identify the interest of social actors and whether the idea would be

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<sup>7</sup> Associação Empresarial dos Concelhos de Sever do Vouga, Estarreja, Murtosa e Albergaria-a-Velha. Available at: <[www.sema.pt](http://www.sema.pt)>. Accessed on: 10 July 2012.

<sup>8</sup> For more information on Urbcom Program, please access: <[www.cedr-lvt.pt/pt/urbcom/1286.htm](http://www.cedr-lvt.pt/pt/urbcom/1286.htm)>. Accessed on: 10 July 2012.

<sup>9</sup> AGIM. Available at: <<http://agim.pt>>. Accessed on: 10 July 2012.

<sup>10</sup> Available at: <[www.josemartino.blogspot.pt](http://www.josemartino.blogspot.pt)>. Accessed on: 10 July 2012.

approved or not (C1). The petition received 369 signatures in less than 30 days.<sup>11</sup> After having the idea approved by the stakeholders, A1, A2, B1, C1 and D1 developed creative social strategic planning to project the idea, a set of interrelated decisions with the formulation of public policy (public-policy-making). In this sense, the institutional partners, political, social and collective actors worked to disseminate innovative initiatives so that the Land Exchange acquired the confidence of stakeholders and was replicated (A2).

The Land Exchange gained greater visibility through mass media,<sup>12</sup> but also through “public interventions<sup>13</sup> and debates in defense of an essential tool to develop agriculture and the economy in its real context” (C1), which favored the relationship between stakeholders. Another important factor, according to (A1), was seeking the recognition of municipalities where Agim and C1 propose that the local government lead the creation of a Municipal Land Exchange (politics). Moreover, it was crucial that the government “motivate citizens who own land and do not have the profile for agricultural activities and/or agroforestry, to cede their land for sale or lease to young farmers” (C1).

The first Land Exchange as an experiment of social innovation was launched in Sever do Vouga, in April 2013, supported by a network formed by: Agim, City Hall, Bernardo Barbosa de Quadros Foundation (organization of social economy) and a private company (A2). One of the actors (B1) explains that many people in the region began to live from growing blueberries, with the technical support provided by Agim. However, there is a shortage of land for young farmers who are now returning to their homeland (B1). However, this impasse was resolved by a protocol of cooperation between the Foundation and Agim (D1).

The interviewee (A1) says that the Foundation, signed a commitment to cooperate, providing 40 hectares of their land, divided into 22 plots. The plots of land with pre-defined areas, vary between 1.23 and 2.38 hectares, and the intention is that in the future, blueberry plantations will have an effective planting area that can vary between 1 hectare and 1.5 hectares.

With the availability of land, the next step was to implement the idea. A pilot project was elaborated — Land Exchange for Growing Blueberries — which was the result of a partnership agreement between AGIM, the Foundation and the private company.

The pilot project Land Exchange presents some criteria in order to respond to the problems that originated the social innovation policy. Firstly taken into consideration is the interest of young people over 18 who want to cultivate the blueberries and are able to invest at least 15% of the needed capital from their own resources. Secondly a priority is given to

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<sup>11</sup> Public Petition can be accessed at: <<http://peticaopublica.com/pview.aspx?pi=P2010N2448>>. Accessed on: 10 July 2012.

<sup>12</sup> Some examples: (<[http://rr.sapo.pt/informacao\\_detalhe.aspx?fid=25&did=111862](http://rr.sapo.pt/informacao_detalhe.aspx?fid=25&did=111862)>. Diário de Notícias, (<[www.dn.pt/inicio/economia/interior.aspx?content\\_id=2391465](http://www.dn.pt/inicio/economia/interior.aspx?content_id=2391465)>), RTP/Notícias ([www.rtp.pt/noticias/index.php?article=547574&tm=9&layout=123&visual=61](http://www.rtp.pt/noticias/index.php?article=547574&tm=9&layout=123&visual=61)).

<sup>13</sup> The legislation about the public policy of Land Exchange is available for Portuguese readers at: <[www.parlamento.pt/ActividadeParlamentar/Paginas/DetalheIniciativa.aspx?BID=36717](http://www.parlamento.pt/ActividadeParlamentar/Paginas/DetalheIniciativa.aspx?BID=36717)>. Accessed on: 11 dec. 2012.

residents and people from places where the land is available. Next the priority is for residents in the city of Sever do Vouga, and those from the city even if they are no longer residents; and young farmers. Thirdly, each person interested in farming activities may apply for a portion, with the average investment estimated at €76,000 (euros) per hectare value that could benefit from Community support through the ProDeR<sup>14</sup> program, among others (A1, A2, but also available from mass media).<sup>15</sup> The Land Exchange provides the lease (farmer/land owner) for a period of 15 years, which is renewable every five years (A1, A2).

The interviewee (A1) explains that the work of Agim, at first, is to gather contacts of those interested in the program, show the land and help define the necessary investments in order to get a well installed blueberry plantation, able to provide high productivity and quality. Note that the Land Exchange, after being released in early May 2013, had immediate demand (A1). In the launch of the program, 70% of the plots available were designated (D1, mass media).<sup>16</sup> The project candidates for the Land Exchange program were a majority of young farmers in order to start with blueberry crop farming (A2).

The social innovation 'Land Exchange' becomes public policy by the Legal Order 197/2013 of May 28<sup>th</sup>, and is officially named "*Bolsa Nacional de Terras*" (National Land Exchange) (policy). The law was published in the Official Gazette, *Diário da República*, law 62/2012 of December 10<sup>th</sup>, creating the national land exchange for agricultural, forestry or silvopastoral use, named '*Bolsa de Terras*' (*Diário da República*, 1<sup>a</sup> Série — n. 102, 3126 3136).<sup>17</sup>

The law states that the Ministry of Agriculture, Sea, Environment and Regulation of the Territory is the manager of the Land Exchange policy, operating through the General Directorate of Agriculture and Rural Development (DGADR). From then on the Land Exchange gains a structure as a network, based on a management model that provides the link between DGADR, as manager of the Land Exchange and the entities authorized to practice operational management acts (GeOP),<sup>18</sup> in accordance with the provisions of Law 62/2012 of December 10<sup>th</sup>.

According to DGADR, the goal of the Land Exchange is ease to access land. Therefore, Land Exchange offers land, "when the land is not used, and, also, through better identification

<sup>14</sup> Program of Rural Development. It is a strategic and financial instrument to support the rural development in the continent, approved by the European Commission, Decision C(2007)6159, on December 04th 2006. Co-funded by the European Agricultural Fund for Rural Development (EAFRD) of approximately EUR 3,5 billion, the program involves public expenses of over EUR 4,4 billion.

<sup>15</sup> *Jornal de Notícias*, April 21st 2013. Available at: <www.jn.pt>; *AgroNotícias*, newspaper, April 21st 2013. Available at: <www.agroportal.pt>; *O Emigrante/Mundo Português*, newspaper, July 4th 2013. Available at: <www.mundoportugues.org>; *Frutas e Legumes*, magazine, April 2013/May 2014. Available at: <www.flfrerevista.pt>; *Diário de Aveiro*, May 20th 2013.

<sup>16</sup> In addition to the interview, published in several channels such as: *AgroPortal Notícias*. Available at: <www.agroportal.pt/x/agronoticias/2013/05/15c.htm>. Accessed on: May 11th 2013; *Veja Portugal*. Available at: <www.vejaportugal.pt/tag/inovacao-e-modernizacao-do-centro-urbano-de-sever-do-vouga/>. Accessed on: 10 July 2013.

<sup>17</sup> *Diário da República Eletrónico*, 1a série — n. 102, May 28th 2013, 3126-3136. Available at: <www.dre.pt>.

<sup>18</sup> It is considered operational management of Land Exchange, the promotion and dissemination, at the local level, of the Land Exchange, including all activities that aim to promote and facilitate the access and use of the program (<www.bolsanacionaldeterras.pt/geop/php>). Accessed on: 11 Dec. 2012.

and promotion of its offer”.<sup>19</sup> The availability of the land is for leasing, sale or other concession modes, if the land is suitable for agriculture, forest and silvopastoral use. Thus, the Land Exchange may have “State owned lands, lands owned by local autarchies and other public agencies, or owned by private entities”.<sup>20</sup> In addition, the Land Exchange offers wastelands, pursuant to the law named “Lei dos Baldios”.<sup>21</sup> For DGADR, the Land Exchange policy “is grounded on the principles of universality and voluntary.”<sup>22</sup>

As well as the creation of GeOP from the social innovation of Land Exchange, the Information System of Land Exchange (SiBT) was created in order to gather and disseminate information among the Land Exchange (B2) participants. Despite the State’s commitment recognizing the social innovation as a national policy, it is observed that by February 2014 the innovation was little advanced in the country, even though some municipalities had implemented the Land Exchange policy.<sup>23</sup> In this context, it is noted that the public administration still fails due to excess of bureaucracy, a characteristic that is particular of this sector (E1).

The fact is that Land Exchange of Sever do Vouga is a successful innovation (B2) and the social innovation policy experiment has fostered the development of the territory (E3). According to (A1 and A2), innovation is based on professional qualification and training of farmers for the cultivation of small fruits. The Land Exchange for Blueberry Cultivation provides a series of training and research development in the cultivation of blueberries (A1). This activity is led by Agim in partnership with universities, institutions of technical training, and technical cooperation agreements with several research units at the national and international level (A1).

At the end of this case study description, it is possible to observe Milton’s thought that “there is no way to explain the territory without its use, there is no way to explain the territory used without a project. That is what makes the territory a central category used for the formulation of a social theory” as clarified by Silveira (2014:16). Following Milton’s line of thought, “the territory is not an inert thing where life happens. Rather, it is a living environment, hybrid of materiality and social life” (Silveira, 2014:16).

In this context, the search results are now discussed.

## 7. Discussion of the research results

Considering our research question, the core of the Land Exchange idea is a deep-rooted action that promotes entrepreneurship (E4), as observed in studies by Fontan, Klein and Tremblay

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<sup>19</sup> Bolsa Nacional de Terras. Available at: <[www.bolsanacionaldeterras.pt](http://www.bolsanacionaldeterras.pt)>. Accessed on: 11 dec. 2012.

<sup>20</sup> Ibid.

<sup>21</sup> Bolsa Nacional de Terras. Available at: <[www.bolsanacionaldeterras.pt](http://www.bolsanacionaldeterras.pt)>. Accessed on: 11 dec. 2012.

<sup>22</sup> Ibid.

<sup>23</sup> RTP Notícias, Economia, Agência Lusa, 18 fev 2014. Available at: <[www.rtp.pt/noticias/index.php?article=717826&tm=6&layout=121&visual=49](http://www.rtp.pt/noticias/index.php?article=717826&tm=6&layout=121&visual=49)>. Accessed on: 18 feb. 2014.

(2004). The Land Exchange, pilot project, created 22 permanent jobs, microenterprises that generate self-employment. However, it plans to create about 400 seasonal jobs during the blueberry picking season, which takes place between May and August (A1, B1). Added to these numbers the fact that the Land Exchange in Sever do Vouga moves many indirect jobs, companies and people who are indirectly linked to the production and commercialization of blueberries, for instance, the production of raw materials and the distribution chain taking the product to national and international markets (A1, B1).

The Land Exchange strengthens the actions of public administration aimed at the development of local characteristics (A1, B1). The blueberry cultivation, as a resource of the territory, opened a window of opportunity in which it was possible to promote the trademark "Sever do Vouga, the Blueberry Capital". With more farmers served by the Land Exchange policy, the city is expected to reach 419 tons of blueberries in 2014 (A1). "The offer is scarce in comparison to the demand for the product" (A1). More than 80% of blueberry production is exported (A1). The data support the interviewee because there is currently a great international demand for the product. Thus, the production exceeded the goals initially established and blueberry cultivation has spread to other regions of the country.

In Sever do Vouga, "the Land Exchange policy is already ahead of the initiative of the Ministry of Agriculture [...] in less than a year, the city advances to the second bid for land allocation" (B2, C1). This second phase serves any type of agricultural production, if such products are intended for commercialization and fits the characteristics of the territory (A2, B2). It is observed "the inhabited territory creates new synergies and ultimately imposes a rematch to the world" (Santos, 2005:255).

The case study identifies a way to deploy the territorial capital<sup>24</sup>. This means that networked structures, through cooperation, are the main mechanism in fostering social innovation policies. The Land Exchange intends to: *i*) serve the young population facing unemployment; *ii*) encourage entrepreneurship in rural areas; *iii*) create jobs and generate income; *iv*) bring young people to live in the rural territory; *v*) promote the socioeconomic development of the territory (B2). "[...] Public policy must take into account the nature of the space, the specificity of each territory and the historical-structural conditions at the origin" (Goulart et al., 2010:400).

The research shows that a networked social innovation system supported the environment in which the social innovation was generated. This system is formed of public sector agencies, private sector, organizations of social economy and higher education institutions (IES), professional training institutions (ETP), Institute for Employment and Professional Training (IEFP), as well as Research Centers connected to universities. This system, in addi-

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<sup>24</sup> It concerns what forms the wealth of the territory, not related to an accounting inventory, but the search for peculiarities that can be valuable, such as know-how, gastronomy, landscape, heritage, etc.

tion to support the implementation of the idea, played the role of dissemination of the social innovation, which turned into national public policy — Bolsa Nacional de Terras.

Taking into consideration the context presented, the social innovation system can form a 'web' amongst companies, universities, research centers, State, civil society and the market, as well as among other institutions that may affect the production of goods and services in a society. It should be noted that this environment could create windows of opportunity, boosting other social innovations that contribute to the consolidation of public policies for the common good (Mulgan et al., 2007). Moreover, it enables the growth and development of the social economy initiatives and promotes a networked social innovation system that naturally fosters social innovation policies and the development of the territory.

The Land Exchange is now a fact in rural areas of Portugal. As an initiative of social economy, the social innovation works as an economic engine that generates more sustainable local support systems, thus contributing to the short, medium and long term for smart and inclusive growth in rural areas. In this context, it can be said that social innovation policy has been able to improve the territorial governance and consolidate paths to other approaches of territorial development. This means that social innovation policy ensures effective mechanisms for different policy coordination and establishes appropriate connections with other sectors through a networked social innovation system. Moreover, social innovation has enabled policy makers and civil society to act in cooperation in order to improve the elaboration and implementation of relevant policies and new programs that explicitly promote the creation of social innovation policies to sustain territorial development.

## 8. Conclusion

Public policies in today's democratic countries are built with the participation of a variety of actors who express their heterogeneity, their interests and different political preferences; they are actors in mutual transformation processes, actors who are in confrontation, connection and work to build consensus. Thus, individuals and institutions — government officials or actors who are part of the bureaucracy of the State; social movements represented by their leadership; and different civil society organizations — have engaged at different levels in the phases of creation of public policies (Ronconi, 2008).

Civil society on one hand, seeks to exercise its right to participate in the elaboration, implementation and evaluation of public policies, through civil society organizations. The State, on the other hand, recognizes the importance of the involvement of other actors in the elaboration of public policy and in its process. In this convergence, it is necessary to have a style of public management inspired in democratic theories that can contribute to the expansion of the public sphere and the dialogue processes. This is a State that, when establishing partnerships with civil society and market, expands the mechanisms for par-

participation and decision making at the level of governance, as well as cooperating so that dialogue and debate consolidate a democracy that goes beyond representative democracy (Ronconi, 2008).

In the context of public management, social innovation is implied in the proposed actions and public policies that transform the European Union into a “smart, sustainable and inclusive economy delivering high levels of employment, productivity and social cohesion” (CCE, 2010:6). Within the emblematic initiatives of the European Community, the Europe strategy 2020 is aimed at “design and implement programs to promote social innovation for the most vulnerable, in particular by offering innovative solutions to disadvantaged communities” (CCE, 2010:23).

In this context, it is possible to argue that smart and sustainable local growth tends to revive the knowledge of *homo faber*, driving to innovation, social innovation. It tends to turn innovative ideas into new products and services that create a societal dynamic of development of the territory, which is competitive, growing, meets pressing needs and handles resources efficiently. Following this trend of thought, the behavior of social innovation can result in incremental changes in local practice or even major changes at the level of sustainable territorial development (Bittencourt, 2014). Finally, smart and sustainable local growth consolidates the idea that innovative organizations promote greater commitment to the territory to meet the challenges and problems of society with respect to eco-socio-economic resources.

Social innovation can be a key factor, enabling organizations in different areas to improve their strategic and competitive position in the territory. This factor of economic citizenship provides global visibility for the territory (MacCallum et al., 2009) and can create, within the social economy initiatives, social innovation policies and development of the territory.

The networked social innovation system helps initiatives of social economy. Many of these initiatives are innovations that result in social processes of reticular cooperation. These social processes reflect the interactions between the actors and innovation. They are interactions and exchanges of information between the social actors, scientists, businesspeople etc., without establishing rigid and deterministic boundaries. In this sense, the organization of social economy, integrated into the networked social innovation system, is able to create a mode of production and/or processes leading to social innovation, and the network is up to widely disseminate the innovation (Bittencourt, 2014). Moreover, the environment of innovation system provides significant insight into the social and collective nature of any kind of social innovation.

Therefore, this research intends to cooperate in the study of social innovation policies and the development of sustainable territories, as well as describe social experiments of social innovation policy in the implementation of local actions for socio-economic sustainability. Moreover, the research intends to encourage discussions around policies that strengthen the creation of a networked social innovation system, thus enabling a more expansive process of social innovation policies.

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