

RQ-01-2007

**Data Collection and Categorization Grid  
for Studying Social Economy Activities**

**2<sup>nd</sup> Edition**

By Yvan Comeau  
With the collaboration of the social  
economy team

Co-publication:

Réseau québécois de recherche partenariale  
en économie sociale (RQRP-ÉS)

Centre de recherche, d'information et de  
développement de l'économie solidaire de  
Québec (CRIDES)

March 2000  
Translated March 2007

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Cahier du RQRP-ÉS

Cahier No RQ-01-2007

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Page setting: Francine Pomerleau

ISBN: 978-2-89276-417-8

Legal deposit: April 2007

Bibliothèque et Archives nationales du Québec

Bibliothèque et Archives Canada

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## Overview

This document presents the February 2000 updated version of the data collection and categorization guide for case studies conducted by the CRISES "Social Economy" team. This update reflects the progress made at CRISES on the social economy issue, and takes into consideration questions women ask about the social and interdependent economy.

We use the term "social and interdependent economy activity" firstly to designate companies/organizations that distinguish themselves by **legal status** (co-operative, mutual company or non-profit company), and that subscribe to the "one person, one voice" rule and to the inalienable nature of such businesses (Desroche, 1983). Secondly, the term designates a **combination of a group of persons and a business** characterized by democratic operation and collective property (Vienney, 1994). Thirdly, the economic activities are of an associative type based on **values** of solidarity, autonomy and citizenship that give primacy to persons and to social capital work resulting in the redistribution of surpluses (Defourny, 1992). Fourthly, such businesses inspire an original type of socio-economic **regulation** (Lavile, 1994). This idea of an alternative to the salaried society leads us to introduce the interdependent economy. Formalized by French sociologists and economists (Jean-Louis Laville, Bernard Eme and Guy Roustang, notably), the interdependent economy consists of initiatives, most often recent, sharing social economy characteristics and combining merchantable, non-merchantable (donations and public grants) and non-monetary (volunteerism) resources. Those initiatives include a strong political dimension as an instrument of citizenship and a response to new needs (Bidet, 1997).

The questions and headings of this guide do not actually constitute an information collection tool such as a questionnaire. Rather, a set of questions is formulated, inspired mainly by regulation theory. For a monographic approach or a case study, this data collection grid attempts to anticipate the greatest possible number of situations, while constituting a common basis of comparison for the cases described.

Monography is particularly well adapted to new and little-studied phenomena (Yin, 1994). It corresponds to exploratory research highlighting the general traits of a set of individuals or phenomena. Its conceptual framework is multidisciplinary and the data preparation is multimodal (Van der Maren, 1995). In a CRISES booklet, Paul-André Lapointe (1993) indicated that the monographic approach is based on a theoretical perspective (mainly the regulation theory as far as we are concerned), multiple data sources, considering the points of view of the persons concerned, non-directive and non-limitative interviews, direct observation, and several stays in the field. Since the data originate from multiple cases, the data collection guide should be used to operationalize the concepts, cover all the dimensions under study, ensure comparability between cases, and guarantee the reliability of results.

The validity and accuracy of the case study rest in large measure on the wealth of documentation, the value of testimonials and the observations of researchers. The latter ensure information accuracy (credibility), validity (relevance) and transferability (representativeness). In other words, authenticity, exhaustiveness and objectivity constitute the essential qualities of a monograph (Van der Maren, 1995: 200). It may thus be appropriate for the case study to be validated by those responsible for the company or organization. This precaution can prevent factual or sequential errors regarding the events reported, among other things. The validation does not aim to establish a consensus between persons providing information - in fact, the existence of different points of view should be indicated - or to omit certain facts. Rather, it contributes to the study's credibility.

The development of this guide is in line with this perspective, and results from a multi-phase undertaking. Firstly, it is based on the theoretical issues of CRISES, which focuses on social relations and on the businesses' institutional and organizational dimensions (Bélanger and Lévesque, 1992).

Secondly, the guide takes into account the general issue formulated by the CRISES "Social Economy" team (Favreau, 1995; Favreau and Lévesque, 1995), a sample of economic insertion businesses (Bordeleau and Valadou, 1995), field work having led to the writing of monographs on work co-operatives (Comeau 1994; Comeau, Bourque and Vaillancourt, 1995), and the supervision of several students having conducted case studies.

Thirdly, the "Social Economy" team's seminar of February 15, 1996 on Claude Vienney (1994 and 1992-1993) was the occasion for CRISES to discuss the guide. During this seminar, a highly stimulating and rewarding discussion took place, based on the seminar of January 18, 1996, when a first draft was tabled by Yvan Comeau. Rather than revisiting here the issues most relevant for studies on the social and interdependent economy - the distinction between the various types of social and interdependent economy businesses, the specific institutional dimension of social economy, the border between description and analysis, the status of the actors' discourse - a pragmatic attitude has been adopted. To take an additional step in devising the data collection grid, we relied on the content of discussions to clarify the grid's headings, while taking into account the organizations' concrete specificities as observed by researchers, whether professors or students, in the course of their work.

Fourthly, the January 2000 update resulted from experimenting with the grid in several case studies and from proposals by the LAREPPS Women's Caucus in late 1998.

On the following page is a diagram of the main headings of the data collection grid. Then clarifications are provided for using the grid.



**Data Collection Grid Diagram  
of Social and Interdependent Economy Activities**

<b>Sources of Information</b>	Documentary Sources	
	Interviews	
	Observation	
<b>Context for Emergence</b>	Environment	
	Sector of Activity	
	Initial Project	
	Promoters	
	Support	
	Startup	
<b>Presentation of Actors</b>	Actors Involved in the Activity	
	Network	
<b>Institutional Dimension</b>	Internal Power Relations	Formal and Informal Power
		Inclusion of Workforce and Users
		Gains of Salaried Workforce
	External Relations	
	Legal and Legislative Rules	
<b>Organizational Dimension</b>	Organizational Profile	Objectives
		Strategic Aspects
		Goods and Services Produced
		Financial Data
	Organizational Processes	Production
		Work Organization
		Training
		Consumption
<b>Summary and Assessment</b>	In terms of Accomplishments	
	In terms of the Social and Interdependent Economy	
	In Societal Terms	
<b>PROSPECTS</b>		



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## Chapter 1

### Sources of Information

The case study of a social and interdependent economy activity (see the definition in the overview) usually begins with relevant **document collection** (see Documentary Sources below). It is recommended to go through all the written documentation (press clippings, internal documents, studies, etc.) before proceeding to interviews and to direct or participant observation. The information collected should normally be classified under the present grid headings so as to facilitate the pursuit of data collection by other techniques.

Following the documentation analysis, one or more **interview guides** adapted to the study's needs and corresponding to the progress of the work are developed. The interview guide is tailored to the grid headings for which information is lacking. The interviews take various forms (informal conversations, mini telephone interviews, formal interviews more or less according to guidelines) to meet the monograph's information needs. The selection of persons to be interviewed depends on the diversity of actors involved in the social and interdependent economy activity, and on the nature of the information desired. For example, to understand the dynamic of relations between management and employees, the viewpoints of employees, managers and executives alike should be listened to. Before proceeding to develop one or more interview guides, it may be useful to call upon key informants (people who are outside the organization but who know it well through occasional involvement as consultants or actors) to give us an overview of the social economy initiative or business, even though they have their own points of view as well.

**Observation** can contribute specifically to data collection. It may at times yield data unnoticed by actors and reveal facts that cannot be mentioned during interviews. Thus, a person who observes can see the physical environment. S/he can notice the way the various actors interact and communicate. S/he can note the reactions, vocabulary and spontaneous comments prompted by an action or issue.

#### Documentary Sources

The main documentary sources are the following: Statistics Canada censuses; social environment studies conducted by a CEDC (community economic development corporation) or a CLSC (local community service centre); official documents describing the activity (social and interdependent economy initiative or business); internal governance rules, minutes of general and board of directors meetings; policy and assessment documents; collective agreement; studies and briefs produced by the organization under study; press clippings; research reports on the social and interdependent economy activity.

#### Interviews

Following the documentary analysis, the interviews are based on guides adapted to the study's information requirements. The types of interviewees should vary, particularly when questions pertain to history and perceptions. The interviewees should include women (initiators, workers, users). The duration varies considerably from one type of interview to another, depending on the information sought from a particular category of actors. For example, a telephone interview may last only a few minutes; an informal conversation may last a few hours or a few minutes; a formal interview usually lasts from one hour to one hour and a half, thus enabling the researcher to explore several issues with the interviewee. In the latter case, the interview is recorded in view of a systematic analysis, and a

backup copy of the recording may prevent disappointment. Consulting a methodological document may prove necessary to conduct a formal interview effectively.

## Observation

Technically, observations are recorded in descriptive notes as soon as possible. Those notes distinguish between the description of phenomena (locations, behaviours, objects), spoken words, and the observer's impressions. In participant observation, the researcher "shares the human condition of the subjects he is observing. He is a social actor and he may have access to the perspectives of others by experiencing the 'same' situations or problems as they do" (Lessard-Hébert, Goyette and Boutin, 1990: 151). The observer ensures that his or her attitude and gender does not vitiate the process.

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## Chapter 2

### Context for Emergence

A description of the context for the emergence of the social economy activity requires an understanding of the environment, sector of activity and initial project, and knowledge of the promoters, including the support they have received and the startup time.

#### Social Environment

Firstly, a study of the social environment contains a basic history of the region or neighbourhood (milestones of the regional or neighbourhood municipalities). Secondly, the environment is examined using various types of data: economic (number of companies and jobs per sector of activity, the gender-based job structure, average income, inactive population, unemployment rate, poverty rate, business closures, job losses), demographic (population, age and aging, family statuses, number of single-parent families, number of children per family) and social (proportion of owners and tenants, housing conditions, leisure facilities, networks of associations, crime). This information is descriptive (the current state), evolutionary (since the last censuses) and comparative (with Quebec). In this regard, the Profile of census divisions and subdivisions in Quebec produced during Statistics Canada censuses is an invaluable source of information.

#### Sector of Activity

Amid the components of the context for emergency, the overall situation of the sector of activity (products, services or aspects of living conditions) in which the activity takes place is important. The aim is to know the economic characteristics of the sector when the social economy activity is created, the various actors' interests in the sector, the possibility of upgrading the status of unpaid or invisible work, the distinction between job creation and job substitution (in the latter case, a company sheds its existing jobs for the social and interdependent economy activity being created). Moreover, is the sector of activity a production niche abandoned by private enterprise or occupied by it (Defourny, 1994: 101)?

#### Initial Project

If the project has evolved from design to realization, its **initial objectives** are presented (working conditions, living conditions, financial security or economic independence) (Vienney, 1994: 82). More specifically, the project's objectives may be economic (developing a service for the population, job creation, collective management, natural resource development) or social (development of the local community starting from a specific problem, home support, reducing inequalities, improving working conditions, ensuring a salary of at least \$8.30 per hour in 1997-1998, applying an employment equity policy, attempts at work/family balance, education and training). Indicate also the service or product considered at the outset, the company's **legal status** (public corporation, co-operative, private company, non-profit company, *bona fide* association) and the reasons for having modified the project along the way.

## Promoters

In social economy activities, there is usually an active core of promoters (number, gender, age, socio-economic provenance, function with regard to the project - participant, decision-maker, user, member, sympathizer, philanthropist). What are their interests in establishing the activity? What are the particular interests of female promoters? The evolution of promoters' respective involvements may also be explored.

## Support

By "support" or "sponsorships" is meant "the support as a whole, financial or not, that has often given founders the necessary confidence and help to realize their project" (Defourmy, 1994: 83). Examine the **type of support** received (advice, loan, loan guarantee, grant, in-kind or financial donation, premises loan) and the **origin** of contributions (private business, public or parapublic organization, union, educational institution, grassroots or community group, individuals, eventual users or clients) to characterize the support. Use a gender analysis to probe whether the gender of the project initiators is a factor in the ability to find support; whether obstacles and resistance are likely to vary according to gender, notably regarding access to credit.

## Start-up

The start-up period of the social economy activity includes the progress of the founding group from the first meeting until the start of operations (project design, planning of the activity, and operational phase), seed money, the time passed and the difficulties encountered externally (prejudice, resistance and competition from the actors identified above in Promoters) and internally (obstacles from promoters, members, managers, executives, employees, users and volunteers).

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## Chapter 3

### Presentation of Actors

This section applies to the actors (persons and groups) involved in the social economy.

#### Actors Involved in the Activity

Identify the internal actors (directors or administrators, executives or managers, members, employees, users, volunteers) and put in perspective (identify and explain) the proportion of men and women, and various characteristics (age and socio-economic provenance). Is the group homogeneous or heterogeneous (Vienney, 1994: 111)?

Special attention should be paid to the specific group of salaried employees, if any, by describing it (number of employees vs. number of members, employee categories, hiring procedures, evolution of the job in relation to production).

#### Network

To present the network surrounding the activity, the organizations or persons in regular contact with the activity's actors should be identified. They belong to the state (local offices of ministries or municipal services, public organizations and local political authorities - city councillor, mayor, warden, legislator), or to the private sector (local industries, businesses, banks), or to social movements (women's groups, grassroots or community groups, unions, other activities of the social economy - initiatives, cooperatives, integration undertakings and organizations, social corporations, public corporations, private participatory companies, development funds), or to local organizations (leisure, sports and family associations) or to a Church (religious officials, parish associations, religious communities).





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## Chapter 4

# The Activity's Institutional Dimension

The institutional dimension consists of "the business's political system in a double sense: first it determines the allocation of power within the business (the parties' rights and responsibilities); then it specifies the decision-making procedures for developing policies on its internal organization and its adaptation to its environment." (Bélanger and Lévesque, 1994: 22). To understand this component of the social economy activity, we are interested in the internal and external power relations, and in the legal and legislative rules.

### Internal Power Relations

To illustrate the internal power relations, we consider power (formal and informal), the inclusion of workforce members and their earnings.

#### Formal and Informal Power

Illustrate formal power (organization chart) and locations where power is exerted. Forms and degree of involvement in actors' decision-making processes (rate of participation in meetings, composition of the board of directors and the executive, replacement of responsible persons). The place of women in places of power: distribution of men and women in decision-making bodies. Modalities of direct and representative democracy, associative mechanisms, the actors' means of information and consultation (see Actors Involved in the Activity p. 15). Evolution and recent changes in the power structure, and membership openness.

Informal power (actors exerting influence through their competency, mastery of external relations, communication, or use of organizational rules) (Crozier and Friedberg, 1977). Informal distribution of power between men and women.

Horizontal cleavage opposing directors and executors (managers and administrators vs. employees and associates) and vertical cleavage opposing the company and associates (employees - managers and employees - and members - administrators and associates) (Desroche in Vienney, 1994: 113).

#### Inclusion of Workforce and Users

Degree of inclusion of workforce members (employees and volunteers) and of users and their families: evolution of relations with management, representative mechanisms, operation of joint committees, conflict-resolution mechanisms, specific agreements.

#### Gains of Salaried Workforce

Types of jobs filled according to gender, and the conditions for access to those jobs (for example, being an income support recipient). Openness to family responsibilities. Working conditions of the salaried workforce (if applicable): union presence (history, concerns, strength), innovative aspects of the collective agreement, description and evolution of the remuneration, work schedule, fringe benefits, holidays and vacations, job security, pension plans. Progress on the issue of pay equity.

## External Relations

The **types of relations** (manifestations of outsourcing and partnership, opposition and cooperation, dependency and autonomy, customers and suppliers, conflicts and alliances) and the **forms of collaboration** (presence at issue tables, membership in coalitions, participation in various types of collective action, exchanges of services, pooling of resources, sectoral or regional cooperation) with the network (see Network p. 15).

## Legal and Legislative Rules

Legal status of the social economy activity (see Initial Project p.13). Recent evolution of laws governing the activity's legal status. Nature of the compromise implied by those legislative provisions. Advantages and disadvantages for the social and interdependent economy activity.

Specific provisions of the internal governance rules.

Laws and regulations concerning the activity. Main law(s), regulation(s) or program having affected or likely to affect the social and interdependent economy activity. Explanation of the change processes.

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## Chapter 5

# Organizational Dimension

The organizational dimension consists of the combination of “resources and technical means to meet one’s objectives for the production of goods or services” (Bélanger and Lévesque, 1994: 25). To understand this dimension, it is necessary to draw the organizational profile of the social economy activity and to describe the organizational processes.

### Organizational Profile

To draw the organizational profile, one must specify the activity’s objectives, strategic aspects, production and financial characteristics.

#### Objectives and Priorities

Objectives pursued (see Initial Project p. 13 for an overview) at the time of the study, population targeted and services, territory covered.

#### Strategic Aspects

An accounting of requirement or market studies, business plans, strategic plans concerning, for example, the promotion of the activity and its services or products.

#### Goods and Services Produced

Nature and volume of activities (goods or services produced) at the time of the study. The market and the competition. Complementarity or competition with the state, private enterprise and the informal sector (family, neighbourhood and natural helpers)?

#### Financial Data

Statement of assets (cash, moveable and real property) and liabilities (debts), and annual budgets of the last five years.

Sources of income: public (grant program), independent (sale of goods or services, fund-raising campaigns), private (donations, sponsorships), associative (subscription, volunteer time); and their relative importance. Approach to reducing or eliminating tariffs. Estimate of the volunteer contribution: product (multiplication) of the number of hours by the hourly wage of \$8.30 (1997-1998).

Support (type and origin - see Support p.14, volume, appreciation by the activity’s spokespersons). Loan opportunities.

Use of surpluses, profits or surplus earnings.

## Organizational Processes

Organizational processes consist of production, work organization, training, and consumption of goods and services.

### Production

Description of the production process. Division of labour between the actors: social (between design and execution), sexual (between men and women) and technical (production of part of the final products in different units) (see Actors Involved in the Activity p. 15). Actors' workloads (see Actors Involved in the Activity). Technology and recent changes. Effects of the production system on the workforce members' health and on the environment.

### Work Organization

Work coordination, work monitoring, task allocation. The actors' degree of autonomy. Recent innovations in work organization.

Impact of the work on work-family balance. Actions considered to facilitate work-family balance.

For volunteer workforce members: work schedule, motivations and job satisfaction factors, including the feeling of social usefulness. Other work-related advantages and disadvantages.

Types of involvement of users in service delivery

### Workforce Development

Types of training activities: occupational training, theoretical training, retraining, continuing education, job-finding assistance (Defourny, 1994: 94-95) or others. Actors targeted (see Actors Involved in the Activity p. 15), frequency, institution responsible, modalities and content.

### Consumption of Goods and Services

Modalities of goods and services consumption: dependent or inclusive? Intensity of the usage link: strong or weak? In one case or another, what is the impact on users and their families?

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## Chapter 6

### Summary and Assessment

A summary and assessment may be considered with regard to accomplishments, social economy and society.

#### In Terms of Accomplishments

Spin-offs: economic (survival and development indices, profitability and profitability indices), associative (indices of members' relative involvement, motivation and participation, feeling of cohesion and solidarity internally) and social (indices of competition, cohabitation, complementarity and joint action with other community resources).

Impact on women's work: lightening and/or recognition of housework, women's access to paid work, social or family empowerment of women as workforce members or users. Indices of recognition or lightening of women's unpaid work, of improved conditions for family/work balance, of breaking down gender-based job compartmentalization.

Main accomplishments with regard to objectives (successful activities, usage frequency, second-generation initiatives) and failures.

Identification of factors having contributed to accomplishments and failures, apart from the efforts of the activity's promoters.

#### In Terms of the Social Economy

Does the activity show signs of degenerating with regard to its nature (reverting to a capitalist business), objectives (profit becoming the sole objective) or organization (hierarchy and control by a few individuals)? Has an attempt at regeneration been made (Cornforth, Thomas, Lewis and Spear, 1988: 113-114)?

What indices show that the activity is reinforcing polarization and favouring a palliative social economy (neo-liberal pole)?

What indices show that the activity is contributing to a complementary social economy with public intervention (welfare state pole)?

What indices show that the activity is renewing practices in terms of democratization, taking charge and empowerment (self-management pole)?

#### In Societal Terms

With regard to employment, for example, are the effects of the social economy activity constructive (integration to the job market, job creation, etc.) or destructive (job displacement, poorer working conditions, etc.)? What is the impact on the social fabric? On other aspects?

What indices show that the activity, alone or in relation to other social movements, has an historical potential, i.e., contributes to a social transformation in the mode of knowledge, in wealth accumulation and in the ethical model (Touraine, 1993: 40-49)?



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## Prospects

What are the prospects for the viability of the jobs created?

What improvements should be made to democratize production and consumption?

In the view of those responsible, does the activity have a dynamic of development or survival?

What are the activity's projects in the short, medium and long terms?

What factors prove necessary for further development (motivation, resources, new people)?





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