



EMES
network



Tension and paradoxes in SE

Complexity is a key concept in SE, often referring to the complexity of the system being studied. This complexity can be measured in terms of the number of components, the number of interactions between components, and the number of different states that the system can be in. The complexity of a system can also be measured in terms of the number of different ways that the system can be organized. The complexity of a system can be a source of tension and paradoxes, as it can be difficult to understand and predict the behavior of a complex system. The complexity of a system can also be a source of creativity and innovation, as it can provide a rich environment for exploring new ideas and solutions.

SE is a complex system, and it is important to understand the tension and paradoxes that arise from its complexity. This understanding can help us to better manage the system and to make more informed decisions about its future. The complexity of a system can be a challenge, but it can also be an opportunity. By understanding the tension and paradoxes in SE, we can learn to work with the complexity and to make the most of it.



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past to build a promising future





Message from the President

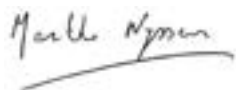
The EMES adventure began with a project-based European thematic network “the Emergence of Social Enterprise”. Twenty years after, the EMES International Research Network is now a worldwide leading research network.

EMES aims to gradually build an international corpus of theoretical and empirical knowledge, pluralistic in disciplines and methodologies, around “SE” concepts: social enterprise, social entrepreneurship, social economy, solidarity economy. The dialogue among various disciplines, among different SE approaches, and between research and action, in a continuous exchange between concepts and empirical evidence, constitutes the DNA of the EMES network.

Our values reflect the way in which EMES conducts its activity. Trust-based relations and mutual learning have been at the core of EMES since its beginning; they also constitute the Network’s defining trait and the best guarantee toward the sustainability of the community and body of knowledge that it nurtures. Five values guide every action and initiative undertaken by EMES: scientific community building through collaboration, trust, engagement, openness and professionalism.

EMES has embarked in a new strategic planning effort in light of the consolidation and transformation needed to cope with the EMPOWER-SE project that heralds a new phase in the development of the EMES network.

This strategic planning effort is the result of the voluntary commitment of a whole human and intellectual community and especially the EMES coordination unit and the Board of Directors. Without such a commitment, the EMES adventure would not be possible. Our deepest gratitude goes to each one of those people who make this adventure possible day after day.



Marthe Nyssens
UCL Professor & EMES President



1

Background

After its first strategic planning process that began in 2011 and resulted in the EMES Strategic Plan 2013-2015, EMES has embarked in a new strategic planning effort in light of the scaling up needed to cope with the EMPOWER-SE project that heralds a new phase in the development of the EMES network.

All institutional members plus individual Board members were invited to participate in discussions to strengthen their participation in the network and contribute with their unique perspectives.

The current Strategic Plan covers the next three years (2019-2021) and it aims to help reshape EMES in that time framework. The present document presents the organizational goals of EMES in an effort to improve how they are achieved. It does so by outlining the actions and resources needed to achieve those goals. The next pages lay out an ideal roadmap for the next three years in order to focus the limited institutional capacity of EMES on the collectively identified priorities in a midst of urgencies and interesting initiatives that appear constantly in the horizon.

The ultimate goal of this Strategic Plan 2019-2021 is to help EMES fulfill its mission better by serving its members and various constituencies in a way that reflects unique organization and human values. This process will be enriched with the dialogue that the Network hopes will come after with the extended membership and stakeholders. It is only by ensuring an open and constructive debate that that EMES will ensure its relevance for the research community and the larger society overall.

2

A historical perspective on the development of EMES



The development of EMES involves the transformation of a project-based European thematic network into a worldwide leading research network. During the strategic retreat of the Board and institutional members held in 2018, the following phases in the development of EMES were identified:

PHASE 1

Prehistory (1996-2000): EMES as a European thematic network

1996
1999



First edition of
"The emergence of
social enterprise"



Paperback version of
"The emergence of
social enterprise".

The story of EMES began with the project entitled "**L'Emergence des Entreprises Sociales**" (acronym from the French title: **EMES**) financed by the European Commission DG Research from 1996 to 1999 as part of its 4th Framework Programme. This project gathered 15 researchers from the EU15 member states under the leadership of Jacques Defourny. Several meetings took place in various EU cities every six months, including field visits to social enterprises to get acquainted with the field. Enzo Pezzini from the European confederation of service cooperatives (CECOP) was the administrative and organizational assistant of the Network at the beginning.

The work during this phase resulted in the publication of the book "**The Emergence of Social Enterprise**" in 2001 consolidated the collective effort undertaken five years before and provided the perfect occasion to organize an **International Colloquium around the book in Trento** that same year. Although the book was not available in paperback until 2004 and thus the audience was limited, the basis for collaboration based on a high level of mutual trust, strong team spirit and willingness to continue working together had been established.



PHASE 2

Formalization (2001-2004): The EMES European Research Network

2001
2004

The PERSE Project financed by the 5th Framework Programme of DG Research was the key driver that ensured a concrete way to sustain the collaboration. The coordination of this second international comparative project was Marthe Nyssens who had completed her PhD several years earlier.

Twelve researchers representing 12 countries worked together from 2001 to 2004 to analyse the multigoal and multistakeholder dimensions of social enterprises taking as an example the area of work integration.

In parallel, several international comparative projects were being developed, including **Elaxies**, **Child Care** and **Third System and Employment**.



In this second phase EMES members worked on the second collective book of EMES focused on Work Integration Social Enterprises (WISEs), entitled **"Social Enterprise. At the crossroads of market, public policies and civil society"**.

2002



An important date was the **formal establishment of EMES as a non-profit organization** under Belgian law in April 20, 2002. The **"EMES European Network- Réseau Européen EMES asbl"** was located at the Center for Social Economy at the University of Liege.

2004



Jacques Defourny (CES, Belgium) was the first formal president of EMES and together with the first formal Board of Directors, mobilized the first financial supporters of the Network namely, the **Cera Foundation** and **Fondazione Cariplo**.



In April 2004, **Rocío Nogales** was hired as a **part-time coordination assistant** to increase the capacity of the Network. This development mirrored the increasing interest on the topic at Social Economy European Conferences (**Prague 2002** and **Krakow 2004**).



Carlo Borzaga and Enzo Pezzini during the foundational meeting of EMES (Brussels, 21 April 2002)



Enzo Pezzini and Marthe Nyssens in the foundational meeting



PHASE 3

Consolidation (2005-2009):

How to live without major research projects

2005
2009



From right to left: Roger Spear, Enzo Pezzini, Adalbert Evers, Marthe Nyssens, Isabel Vidal and Jacques Defourny at the meeting of the board of directors of EMES at CECOP (Brussels, 24 June 2006)

Some groundbreaking initiatives took place in this phase such as the joint **EMES-ISTR European conferences in Paris (2005) and Barcelona (2008)**, which enabled both organisations to team up and attract over 600 people during its second year of collaboration. **The first members' seminars was held in Barcelona in 2006** and the quoted joint paper was published in the Social Enterprise Journal.

An important project involving several EMES members was the mapping of social enterprise commissioned by the Bratislava Regional Centre of the UNDP. The final publication stemming from this project, **"Social Enterprise: A New Model for Poverty Reduction and Employment Generation"** was launched in 2009.



The third phase in the history of EMES began with a challenging outlook: there were no new major EU projects in the horizon in spite of several submissions and attempts. However, there was a fastly increasing international interest in the two seminal collective books by EMES, which allowed the Network to attract major financial support from the French-speaking Community of Belgium. Thanks to the financial support granted over the period 2005-2009, the institutional capacity was raised and the **Coordination Unit was able to consolidate its first employee as a full-time coordinator (Rocío Nogales), hired Sabine Spada as a part-time while Sophie Adam continued as a part-time editorial assistant.**

Rocío eventually moved to Madrid in February 2008, which resulted in the creation of an EMES antenna in Spain.



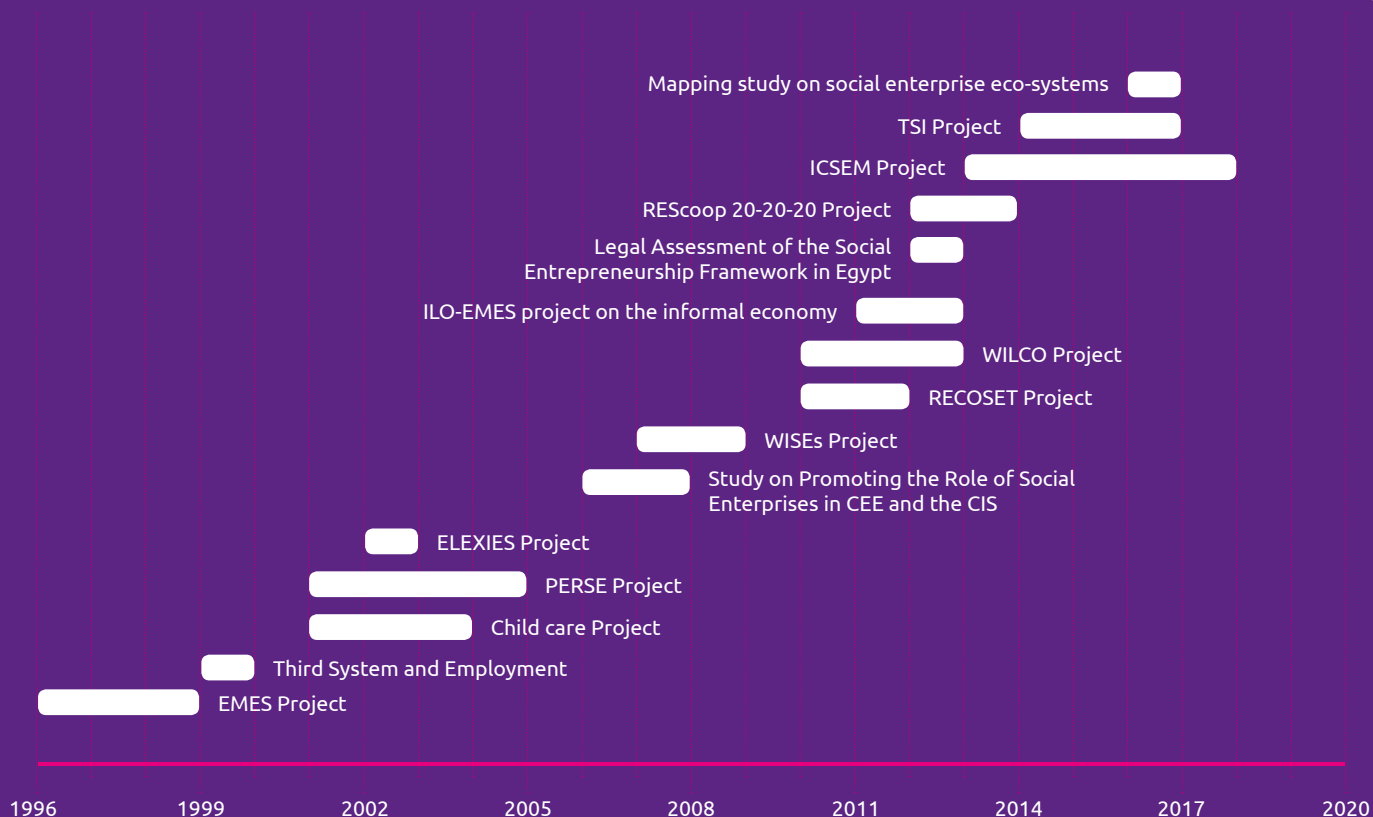
Participants of the first "EMES Members' seminar" in Barcelona (2006)

2009

Two strategic decisions were also taken in this phase, namely to organize the **1st EMES PhD Summer School in Corte (Corsica, France) in 2008** and the **1st EMES International Research Conference on Social Enterprise in Trento (Italy) in 2009**. All these initiatives confirmed the growing interest in research around social enterprises and related areas thus providing new wind for rethinking the role of EMES in such developing community.



Research projects



PHASE 4

Globalization (2010- 2015)

Empowering peripheral researchers and building a global community



Lars Hulgård (CSE-RUC, Denmark) was elected as the second president of EMES and during his six-year mandate he hosted the **2nd EMES PhD Summer School** and the **2nd EMES International Conference in Roskilde**. Lars also attracted significant financial support from the Danish foundation Det Obeltske Familiefund



The **4th EMES Conference** took place in Liege in **2013** and the registration fees were left to EMES in its entirety, ensuring the sustainability of the Network for the next two years.

A major milestone for the Network was the formal enlargement that it underwent as a result of the first strategic planning process. **EMES opened up to new members from all regions and changed its name from "European" to "International" through a bylaws revision in 2015.**

A lot of project-related dissemination-communication activities are completed including actions and materials for **REScoop 20-20-20**; **WILCO** (led by Taco Brandsen, 2010-2014); **SIE**, Social Innovation Europe (dates) and the **Third Sector Impact** (led by Bernard Enjolras, 2014-2017).



2010
2015



The Board and institutional members engaged in the Network's first strategic planning process. After a strategic retreat in Belgium, an Action plan was published covering 2014-2017.

Various collaborations and partnerships were developed in Latin America with the sister network **RILESS**; in Eastern Asia with joint **conferences in Taiwan (2010)** and **South Korea (2014)**; as well as in **Eastern Europe**, under the leadership of EURICSE.



2012



Margie Mendell (Concordia University) listens attentively to Kari Polanyi-Lewitt during the 1st EMES-Polanyi Seminar in Paris (2012)

Jean-Louis Laville (CNAM, France) spearheads joint events with **the Polanyi Institute in the form of a bi-annual seminar**. The first one was held in Paris in 2012 and counted with the participation of Kari Polanyi-Lewitt and Margie Mendell (Polanyi Institute, Montreal), Nancy Fraser (US) and José Luis Coraggio (Argentina).

2013



The **ICSEM Project** was launched in July 2013 under the scientific leadership of Jacques Defourny and Marthe Nyssens, gathering more than 200 research partners from 30 countries.



The Coordination Unit participated in the **first social enterprise mapping in Europe** as part of the Quality Check Team together with the Euricse team.

2015

2016

Regarding the Coordination Unit, Rocío's title changes to managing director and she is progressively assisted by Sabine Spada (accounting and financial matters), and Julie Rijpens and Jenny Eschweiler as project officers in relation to EMES-related EU projects (**REScoop 20-20-20**, **WILCO**, **TSI**, **SIE**). Laura Catana joined the Unit as intern for three months in 2016.



PHASE 5

Searching for stabilisation (2016-2021): EMES as a global social enterprise

 6th EMES International Research Conference on Social Enterprise
EMES events

Marthe Nyssens (CIRTES-UCL, Belgium) became the third president of EMES in 2016 as a result of the first election process open to all members in 2015. Marthe would lead the organization of **the 6th EMES International Conference** and become the Chair of the first COST Action won by EMES, **"Empowering the next generation of social enterprise scholars" (EMPOWER-SE).**

Fondat°Bernheim

Significant financial support has been secured from the **Bernheim Foundation** to increase the capacity of the Coordination Unit from 2018 to 2021. Particularly, it enabled the Unit to hire Thomas Pongo as project, membership and communication officer. Michaela Lednova spend nine months in Madrid in 2017 as a visiting fellow.



The overall annual budget raises from 170K to 240K Euro in two years to be compared to an annual budget of 90K-130K Euro until 2010.

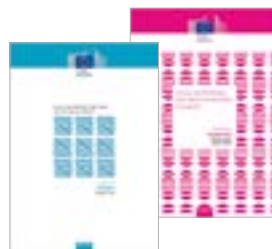
The Network embarks in its **second strategic planning process** in search of a new, more stable, economic model.

In this context, a more structural support is sought to be combined with **research projects, membership fees, conference fees** and **other resources.**

2016
2021



Regarding projects, the ICSEM Project has completed its first phase and enters phase two with three major books to be published by Routledge. The **EMPOWER-SE COST Action runs from 2017 to 2021** and gathers researchers from 44 countries. Over 15 events and a broad range of initiatives are planned to take place as part of the Action.



The Coordination Unit participates in the coordination of the pilot update on the **mapping study** in 2016 (seven countries) and of the full update in 2018-19, involving 28 countries.

2019

The **second open elections process** will take place in 2019 and will result in a strengthened and committed Board of Directors. Together with institutional members as well as individual members around the work, EMES enters a riveting phase of renewed commitment to the consolidation of social enterprise as an area of research in connection with other stakeholders.

Publications

The Emergence of Social Enterprise

Borzaga, C. & Defourny, J. (eds), Routledge, London / New York, 2001. Also published in Korean (Sigma Press, Seoul, 2009), Japanese (Hyoronsha Publishers, Tokyo, 2004), and Italian (Edizioni31, Trento, 2001).

Tackling Social Exclusion in Europe. The contribution of the Social Economy

Spear, R., Defourny, J., Favreau, L. & Laville, J.-L. (eds), Ashgate, Aldershot, 2001.

The Third Sector in Europe

Evers, A. & Laville, J.-L. (eds), Edward Elgar, Cheltenham, 2004.

Trends and Challenges for Co-operatives and Social Enterprises in Developed and Transition Countries

Borzaga, C. & Spear, R. (eds), Edizioni31, Trento, 2004.

Social Enterprise. At the Crossroads of Market, Public Policies and Civil Society

Nyssens, M. (ed.), Routledge, London / New York, 2006.

Dictionnaire de l'autre économie

Laville, J.-L. & Cattani, A. D. (eds), Desclée de Brouwer, Paris, 2005. Also published in Portuguese (Almedina, Coimbra, 2009), Spanish (Editorial Altamira, Buenos Aires, 2009) and Italian (Sapere2000, Roma, 2006).

Co-production: The Third Sector and the Delivery of Public Services

Pestoff, V. & Brandsen, T. (eds), Routledge, London / New York, 2007.

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Borzaga, C., Galera, G. & Nogales, R. (eds), UNDP/EMES, Bratislava / Liege, 2008.

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Ranci, C., Brandsen T. & Sabatinelli, S. (eds), Palgrave Macmillan, Basingstoke, 2014.

Civil Society, the Third Sector and Social Enterprise. Governance and Democracy

Laville, J.-L., Young, D.R. & Eynaud, P. (eds.), Routledge, London/New York, 2015.

Social Entrepreneurship and Social Enterprises in the Nordic Countries

Andersen, L. L., Gawell, M. & Spear, R., Routledge, London/New York, 2016.

Social Entrepreneurship and Social Enterprises. Nordic Perspectives

Lundgaard, L. A., Gawell, M. & Spear, R. (eds), Routledge, London / New York, 2018.

Social Enterprise in Asia. Theory, Models and Practice

Bidet, E. & Defourny, J. (eds), Routledge, London / New York, 2019.

Social Enterprise in Latin America. Theory, Models and Practice

Gaiger, L.I., Nyssens, M. & Wanderley, F. (eds), Routledge, London / New York, 2019.

People Centered Social Innovation. Global Perspectives on an Emerging Paradigm

Banerjee, S., Carney, S. & Hulgård, L. (eds), Routledge, London / New York, 2019.

A photograph of two women in a library setting. The woman on the left, with short dark hair and wearing a dark blazer over a white top, is looking down at a stack of books. The woman on the right, with long dark hair and wearing a dark top, is also looking at the books. They are both smiling and appear to be engaged in a conversation. The background shows bookshelves filled with books. The image is overlaid with large, semi-transparent purple and blue shapes. A large orange circle is positioned over the text.

3 Mission statement and values

Mission statement

The EMES International Research Network (EMES) aims to gradually build up an international corpus of theoretical and empirical knowledge, pluralistic in disciplines and methodologies, around “SE” concepts: social enterprise, social entrepreneurship, social economy, solidarity economy.

EMES is composed of research centres and individual scholars who share a threefold fundamental perspective:

1 They all focus on a common field of research made of specific types of organisations that

- develop economic activities;
- have a clear social dimension, as they seek to serve their members’ needs or the community at large, rather than maximizing profits;
- have autonomous bodies of governance, characterised by participatory decision-making processes and often by a quest for some form of economic democracy.

2 These research centres and scholars all use some specific analytical grids, which rely on a combination of what we call three “SE” approaches:

- the “social enterprise” approach, which stresses entrepreneurial initiatives focusing on social aims;
- the “social economy” approach, which embraces all types of not-for-profit organisations, including cooperative enterprises as well as non-profit, voluntary organisations and foundations; and
- the “solidarity economy” approach, which highlights collective dynamics in their double dimension—economic and political dimensions—, which are closely interconnected.

These SE approaches are combined with insights from other fields such as social innovation, sustainable development or the socio-economics of the commons.

3 EMES researchers rely on multi-disciplinary dialogue between many disciplines: economics, sociology, political sciences, management, law and psychology. All these disciplines are represented in the EMES membership, and, of course, no other discipline is excluded.

The dialogue among various disciplines, among different SE approaches, and between research and action, in a continuous exchange between concepts and empirical evidence, constitutes the DNA of the EMES network.



Values

Our values reflect the way in which EMES conducts its activity. Trust-based relations and mutual learning have been at the core of EMES since its beginning; they also constitute the Network's defining trait and the best guarantee toward the sustainability of the community and body of knowledge that it nurtures. Five values guide every action and initiative undertaken by EMES: scientific community building through **collaboration, trust, engagement, openness** and **professionalism**.

Collaboration

Within EMES collaboration is both a goal in itself but mostly a way of doing things. Any endeavor to be discussed for undertaking within the Network seeks to maximize the collaborative potential of the Network and its members. This is the nature of EMES and thus the main task of its Coordination Unit: to ensure that as many opportunities for collaborations are made visible and facilitated, putting on the table a wide range of resources.

Trust

The field that we study and the sphere of society that aim to influence rely on the essential idea that people are at the center of any economic activity. Collaboration at EMES is based on trust resulting from high quality and rewarding exchanges as a pillar for building solid joint initiatives. Moreover, EMES takes pride in taking care of members, staff, volunteers, partners and other constituencies.

Engagement

The main resource of EMES is the commitment of its members: what is nurtured at EMES are the projects, time and other resources brought by its members.

Openness

Any researcher interested in the field, regardless of the career stage or geographic origin, can be a part of EMES. The network formally opened to an international membership back in 2013 passing from being a closed group of European scholars to a wide community of individuals and centers. Keeping an open community with a focused co-created research set of research foci demands resources to ensure that accessibility to participation and opportunity to participate in events and projects are offered, despite the numerous extrinsic limitations imposed by financial constraints.

Professionalism

Since the arrival of the first employee to EMES, the Coordination Unit has thrived to offer professional responses to a fast-changing environment requiring to rapidly adapt. In the past two decades it has led the organization of international events; facilitated and coordinated research proposals; participated in projects; acted as lobby for research vis-à-vis international organizations and national governments; and maintained a useful communication with its various constituencies. The management of an international membership base became a central axis for professionalization both in terms of keeping up with its administration but also ensuring a fluid communication with members with a view to enabling participation and collaboration.





Governance system

During the strategic retreat held in June 2018, the following guidelines for finding the “EMES way on governance” were presented, focusing on a number of organizational and operating system elements.

In general, the majority of governance-related legislative, regulatory and “good practice” requirements emphasise:

- Ensuring delivery of objects/adherence to purpose
- Complying with governing documents, regulatory and legal requirements
- Financial prudence
- Complying with statutory accounting and reporting requirements

As for the role of the Board, the main values driving its actions can be summarized as follows:

- Compliance/conformance (safeguarding member interests; determining mission and purpose; ensuring programs, manager’s actions and resource allocation is congruent with mission and purpose).
- Stewardship (of organisational ‘assets’ and performance improvement by adding value to top-level decision and strategy making).
- Representation (of member interests through policy/strategy-making and ensuring implementation of traditional democratic structures) and (of stakeholder interests through policy/strategy-making and carefully balancing stakeholder needs).

There will be a new election of the Board in 2019 where all members can participate. This open election was already included in the revision of the bylaws conducted in 2015. A nominating committee will be set up in January 2019, nominations will be welcomed during the spring 2019 and the candidates will be presented during the General Assembly in June 2019.

Members will be able to cast their online votes until October 2019.



4 Strategic goals and key priorities

Strategic goals

Four main strategic goals have been identified in order to guide the work to be done by the Coordination Unit in the next three years. They are connected in a continuous circle.



2019
2021



GOAL 1

Bridging, exchanging, matching and stimulating opportunities for strengthening and fostering an intellectual vibrant research community around SE in a pluralistic way

In order to support the development of original knowledge on SE on a pluridisciplinary approach and to discuss the challenges and the opportunities faced by social enterprises to build sustainable societies, EMES:

- Bridges different epistemological traditions (business, economics, sociology, political science, psychology, education, geography and other social sciences) and geographical backgrounds;
- Combine different analytical grids what we call “SE” approaches with insights from other fields such as social innovation, third sector, sustainable development or the socio-economics of the commons;
- Opens up and strengthens the research community to countries with none or a limited tradition of SE research;
- Trains and strengthens a pluridisciplinary community of PhD students in the field of SE;
- Fosters new research collaborations;
- Connects the research community with a diversity of SE stakeholders.



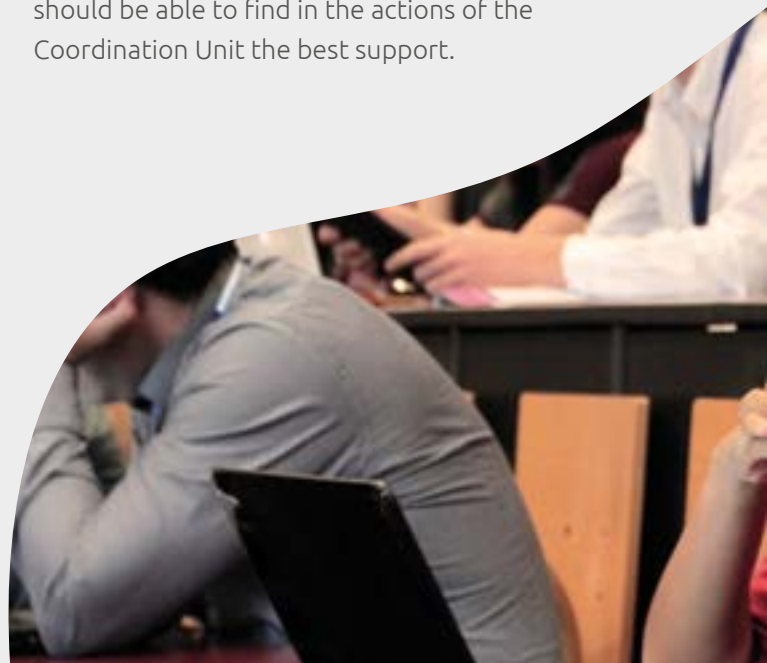
GOAL 2

Enhancing participation and empowerment of members

As a principle, EMES does not pursue to maximize its growth but to intensify the quality of the exchanges developed within the community. The key to achieve this is EMES to enrich organizational culture and positive member experience by:

- Fostering the feeling of ownership of members.
- Leading to their commitment towards developing a community and contributing to its development and sustainability.
- Offering diverse channels for their participation.
- Empowering their capacity to conduct research and to become leaders in their own country to undertake such research.

Through their formal membership, EMES members should be able to find in the actions of the Coordination Unit the best support.



GOAL 3

Fostering comparative research

The unique gathering of researchers interested in the wide field of social enterprise working across disciplines creates countless opportunities to find synergies and foster collaborations. Foster new comparative research proposals and joint publications for enhancing comparative International research projects on SE is part of the DNA of EMES. Scientific event of various kinds organized by EMES are a natural context for identifying research, writing and project partners as there are numerous possibilities to encourage these exchanges.

GOAL 4

Ensuring the sustainability of the Coordination Unit

This goal focuses on strengthening the institutional capacity of the Coordination Unit as the concrete operational unit of the network. This capacity includes the financial capacity to ensure its viability but also a transparent and active governance and increasing systematization that allows to improve processes and take stock of the organizational knowledge accumulated.



Key priorities

There are many possibilities for implementing the four strategic goals described above. However, given the limited resources and time period covered, identifying priorities in a key part of any strategic planning. These are the main priorities connected to each goal and the actions associated to each priority.

GOAL 1

Bridging, exchanging, matching and stimulating opportunities for strengthening and fostering an intellectual vibrant scientific community around SE in a pluralistic way

- **Priority 1.1.** To organize high quality scientific events focused on EMES' intellectual identity.
- **Priority 1.2.** Integrate early career researchers and PhD students into the international SE research community with the support of established scholars.
- **Priority 1.3.** To communicate widely the activities and initiatives of EMES and the outcomes of its research and actions.
- **Priority 1.4.** To connect the research community with major non-research SE stakeholders.
- **Priority 1.5.** To stimulate the gathering of interested members around specific focus points and connect EMES research with other emerging interesting topics/fields (commons, ecofeminism, social innovation...).

GOAL 2

Enhancing participation and empowerment of members

- **Priority 2.1.** To encourage members to feel an active part of a research community and personal network and contributing (not only through the GA or paying fees) to its development.
- **Priority 2.2.** To give members (individual and institutional) specific responsibilities related to EMES activities or governance with recognition.
- **Priority 2.3.** To ensure that the primary task of the CU is to facilitate initiatives coming from members.

GOAL 3

Fostering comparative research

- **Priority 3.1.** To promote comparative studies that allow to share intellectual curiosity and enhance mutual learning through tangible initiatives (projects, publications, etc.).members.

GOAL 4

Ensuring the sustainability of the Coordination Unit

- **Priority 4.1.** To secure the financial support to sustain the financial model understood as a methodical and institutionalized approach to building a reliable revenue base to support an organization's core programs and services.
- **Priority 4.2.** To improve organizational performance by ensuring a strong governance framework supported by effective systems and processes to enable the Coordination Unit to deliver against objectives.

5 EMES Action Plan 2019-2021



Actions

This section describes the concrete strategies for achieving the above-mentioned priorities, including actions, resources needed, timescales and a procedure for reviewing progress.

GOAL 1 | Priority 1.1. To organize high quality scientific events focused on EMES' intellectual identity.

Action 1.1.a.

To organize two international conferences (2019 and 2021)

Ongoing actions

To work closely with SHU team in the planning of the 2019 conference (aimed participants: at least 350)

To sign an agreement with SHU *

New actions

To identify an interested host partner for the 2021 conference *

To sign an agreement and develop a work plan (planning and procedures to enable a fluid communication and implementation) with the 2021 conference host *

Action 1.1.b.

To co-organize scientific seminars and working groups meetings in the framework of the EMPOWER-SE COST Action

Ongoing actions

To work closely with the teams in charge of the WG1 meetings:

Trento seminar (11/2018)

Frankfurt seminar (3/2019)

To work closely with the teams in charge of the WG1 meeting in Budapest (1/2019)

New actions

To find scientific leaders to lead the organization of three or four thematic seminars (WG2) between 2020-2021 on social finance, culture, the commons...

To find scientific leaders for the follow-up event of Budapest (2020)

Action 1.1.c.

To co-organize biannual EMES-Polanyi seminars

Ongoing actions

To identify an interested partner for 2020 (MoU with conditions and timing)

New actions

To sign an agreement and develop a work plan (planning and procedures to enable a fluid communication and implementation) with the host





GOAL 1 | Priority 1.2. To integrate early career researchers and PhD students into the international SE research community with the support of established scholars.

Action 1.2.a.

To organize international summer school (2020)

Ongoing actions

To evaluate the 2018 COST-CNRS-EMES training school based on the evaluation surveys

New actions

To identify interested partner for 2020

To sign an agreement and develop a work plan (planning and procedures to enable a fluid communication and implementation) with the 2020 summer school host

Action 1.2.b.

To develop links with and among PhDs and young researchers through the EMES PhD Students Network

Ongoing actions

To establish ongoing communication with the PhD representative of the Board | Ongoing | CU

To co-organize PhD event(s) within EMES conferences | For all events | CU

New actions

To produce specific video pills featuring the PhD community

To organize one annual event in Brussels targeting students of all levels to present SE (Bernheim event)

To strengthen the education part on the website to promote it among the student community

Action 1.2.c.

To continue support to the EMES Junior Experts' Blog (EJEB)

Ongoing actions

To encourage PhDs to contribute to the EJEB

To do an editorial checking of each post and contribute with the promotion in EMES outlets

To ensure that each PhD who participated in a summer school publishes a summary of his/her thesis

To promote and manage ITC grants

New actions

PhDs or early-career researcher benefitting from a STSM will publish a summary of her/his stay



GOAL 1 | Priority 1.3. To communicate widely the activities and initiatives of EMES and the outcomes of its research and actions.

Action 1.3.a.

To maintain up-to-date web sites, including both the main platform (www.emes.net) and the project-related ones (e.g. EMPOWER-SE)

Ongoing actions

To keep all pages updated, particularly projects, members, events and education pages

To feed the blog with one news per month (at least)

To set up and implement a video strategy

New actions

To create a working group (Board, CU, implementer) to redesign and revamp the EMES platform (especially publications and membership)

To conceive and produce a short podcast series

To disseminate the results of the STSM and the ICT conference grants on the EMES blog (news section) based on scientific report and possible video statement | Ongoing | CU and STSM beneficiary

Action 1.3.b.

To produce an Annual Activity Report in the first three months of every year

Ongoing actions

To continue producing Activity Reports

New actions

To set up a process to collect information periodically and publish the report in the first trimester of each year

To implement communication actions around the launch of the report

Action 1.3.c.

To produce periodic News Alerts and maintain related mailing lists (News Alerts)

Ongoing actions

To maintain the EMES mailing list

To launch bi-monthly news alerts

New actions

To maintain the EMPOWER-SE mailing list

To launch periodic EMPOWER-SE news alerts (periodicity to be confirmed)

Action 1.3.d.

To maintain a social network strategy mainly through Facebook and Twitter but also YouTube

Ongoing actions

To maintain a presence on Twitter (re/tweeting at least twice a week)

To maintain a presence on Facebook (posting at least twice a week)

New actions

To create a social media strategy throughout the year that goes beyond the events and allows integrating the various channels (external support would be needed for this)

Action 1.3.e.

To ensure publications from events and projects

Ongoing actions

To feed and promote the Routledge SE & SI Series

To continue nurturing the EMES Working Papers and EMES Selected Conference Papers series (2019 and 2021 conference; 2020 EMES-Polanyi seminar)

New actions

To ensure that the outputs are published (one stakeholder brief per seminar; selected papers published; three books ICSEM; one other volume)

To establish several working groups of members to nurture and care for the nurturing of the various series. This task will be the responsibility of the person in charge of the series OR/AND a person of the board

GOAL 1 | Priority 1.4. To connect the research community with major non-research SE stakeholders.

Action 1.4.a.

To participate in GECES and the UNTFSSSE

Ongoing actions

To participate in GECES

To participate in UNTFSSSE

New actions

To organize one stakeholders talk at each event

Action 1.4.b.

To explore the idea of financing a platform that gathers stakeholders interested in research

Ongoing actions

To launch a strategic reflection around the shared interests and reciprocal contributions in the SE ecosystem with all stakeholders categories led by a member of the board/specific working group

New actions

To continue searching funds to finance such platform led by a member of the board/specific working group

GOAL 1 | Priority 1.5. To stimulate the gathering of interested members around specific focus points.

Action 1.5.a.

To set up decentralized working groups

Ongoing actions

New actions

To spearhead the creation of “affinity groups” during the conferences and seminars led by interested members (by May 2019, led by appointed Board member)

Action 1.5.b.

To facilitate conference, research and visit studies in the framework of the STMS and ICT conference grants from COST

Ongoing actions

To set a system in place to follow up and implement the Short Term Scientific Missions (STSM) from EMPOWER-SE (STSM coordinator and CU)

New actions

To follow up with all the requirements related to STSM and ICT conference grants

GOAL 2 | Priority 2.1. To encourage members to feel an active part of a research community and personal network and contributing (not only through the GA or paying fees) to its development.

Action 2.1.a.

To create a “proposal pipe line” in various directions (upward, downward and horizontal)

Ongoing actions

New actions

To create a template to collect information on ongoing opportunities from institutional members (open positions, open calls for conferences and publications; collaborations for proposals; other relevant information)

To gather the information and circulate it among institutional members and members of the Board

To create a communication campaign around this new opportunity for members



Action 2.1.b.

To organize annual institutional members' research seminars (starting on 2019)

Ongoing actions

New actions

To appoint a leader (institutional member or member of the Board) to organize the 2019 event (the day before a general meeting)

GOAL 2 | Priority 2.2. To give members (individual and institutional) specific responsibilities related to EMES activities or governance with recognition.

Action 2.2.a.

To set up working groups within the Board

Ongoing actions

New actions

To identify a portfolio of tasks for members of the board

To select a nominating committee to manage the open election process

To find a member of the board to spearhead the update of the website

Each year, to find someone to organize the institutional members' seminar

To ensure that a member leads each of the affinity groups established (see Action 1.5.a)



GOAL 2 | Priority 2.3. To ensure that the primary task of the CU is to facilitate initiatives coming from members.

Action 2.3.a.

To improve the membership management system

Ongoing actions

To implement a membership management system that facilitates the workload and streamlines processes based on real needs observed since 2013

New actions

GOAL 3 | Priority 3.1. To promote comparative studies that allow to share intellectual curiosity and enhance mutual learning through tangible initiatives (projects, publications, etc.).

Action 3.1.a.

To participate in and support projects led by at least three EMES members

Ongoing actions

To participate in the preparation of proposals for projects where the CU can play a central role (e.g. WILCO, TSI)
To capitalize on opportunities and meetings for preparation of interesting calls

New actions

To disseminate requests that come through the CU identify open and interesting
To stimulate comparative research exchanges in the framework of WG1
To promote exchange and discussions in all meetings organized by setting up a dedicated time

GOAL 4 | Priority 4.1. To secure the financial support to sustain the financial model understood as a methodical and institutionalized approach to building a reliable revenue base to support an organization's core programs and services.

Action 4.1.a.

To implement a funding model understood as a methodical and institutionalized approach to building a reliable revenue base to support an organization's core programs and services

Ongoing actions

To ensure the up-to-date accounting of the organization
To conduct annual audits

New actions

To set up a working group within the Board to achieve the implementation of the funding model proposed by the Board

Action 4.1.b.

To secure current membership and encourage members signing up for an event to renew the year after

Ongoing actions

To maintain ongoing communication with institutional members (including pipeline, see).

To ensure the transparency throughout the whole election process in order to increase ownership from members

New actions

To revise the value proposition for membership (institutional and individual)

To conduct a member evaluation survey (individual and institutional)

Action 4.1.c.

To secure project funding as per Annex 1 (at least 30,000€ per year)

Ongoing actions

To follow up public calls coming from the EC and other funders and discuss them internally to consider the participation of the CU

To participate in the Mapping study (2018-2019) covering 28 countries in collaboration with Euricse

New actions

To collaborate on the redesign of the proposal to the EC on migrants and EC

Action 4.1.d.

To sign agreements with members organizing events to ensure that CU costs are covered and any remaining surplus can be reinvested in the network

Ongoing actions

To sign agreements ensuring income as expressed in Annex 1 with partners of:

- 2019 and 2021 conferences
- 2020 Polanyi seminar
- 2020 summer school

New actions

To produce a agreement model per type of event (conference, summer school, seminar)

Action 4.1.e.

To seek support from 5 foundations interested in the topic to cover part of the CU operating funds

Ongoing actions

To identify and work with foundations that value the contribution to knowledge and the common good that EMES generates

New actions

To develop a funders package proposal, visibilization strategy)

To identify who sets the contact with each targeted foundation (DE, DK, NO...)

To set up a donors relations system ensuring that objectives meet the action plans for each potential/existing donor

To consider new membership categories (e.g. 'Associate Member') in order to recognise financial supporters and research funding partners

Action 4.1.f.

To open a dialogue with GSEF to negotiate joining their scientific committee

Ongoing actions

To participate in the GSEF2018 in Bilbao

New actions

To contact the secretariat to spearhead a research effort for GSEF2020 in Mexico in collaboration with other partners

To explore the possibility of learning about the situation of research and the relationship with stakeholders in the various public administrations members of GSEF

GOAL 4 | Priority 4.2. To improve organizational performance by ensuring a strong governance framework supported by effective systems and processes to enable the Coordination Unit to deliver against objectives.

Action 4.2.a.

To gradually systematize standard processes (event organization, membership management, donors relationships, etc.) taking place within the CU

Ongoing actions

New actions

To produce a membership management system with clear instructions about activation and member relations (by the end of 2019)

To produce a conference organization package with clear instructions

To establish a donors relationship management to ensure follow-up and fluid communication with them

Action 4.2.b.

To define clear trimestral objectives for the three staff members and evaluate their work yearly

Ongoing actions

To create position descriptions for each staff member

To decide which tasks are core responsibility of the managing director acknowledging the risks associated to each

To implement and plan the division of work among staff members

New actions



Action 4.2.c.

To run the organization in an effective, efficient and transparent way making optimal use of the scarce human resources available and avoiding when possible actions that result in a financial loss for the organization

Ongoing actions

To conduct annual account external audits. CU and external auditor

To search for the best traveling and accommodation options for events (both for staff members and invited speakers/ participants)

New actions

Action 4.2.d.

To develop a supportive and encouraging environment where staff members can thrive both personally and professionally

Ongoing actions

To hold weekly meetings among staff members and periodic face-to-face meetings, outside the holding of events

To create an incentive package and implement a periodic salary revision for staff (+5 years)

To produce a set of employee guidelines

New actions





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6

Harnessing the
impulse of a solid
past to build a
promising future

Future ...

Embarking in this second strategic planning process has been quite an adventure. And we know it is just the beginning. During the next three years we need to build the future that we would like to be living tomorrow, so let's get to work.

We aim to evaluate the actions and results of EMES against the Strategic Plan summarized in this document. The main keywords that should stand out neatly from this document are **scientific knowledge**, **diversity**, **community** and **together**.

If after reading this Strategic Plan you have ideas or insight that you would like to share with us, feel free to write to strategicplan@emes.net. We look forward to meeting you soon in the next three years!



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