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# SOCIAL INNOVATION USING THE EXAMPLE OF CONSORTIA OF SOCIAL ECONOMY ENTITIES

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DOI: 10.15611/pn.2020.9.01

JEL Classification: O35, D69

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*Quote as:* Błażejowska, M. (2020). Social innovation using the example of consortia of social economy entities. *Prace Naukowe Uniwersytetu Ekonomicznego we Wrocławiu*, 64(9).

**Abstract:** The aim of the article is to present the functioning of consortia composed of various legal forms of social economy entities. The subject of the research are consortia operating under the brands: “Klunkry”, “Panato Bag” and “Juchowo Farm”. They include social cooperatives, establishments of professional activity, foundations, associations, social integration centres and non-profit companies. The mutual cooperation of various legal forms of social economy entities, an innovative management mechanism, and manufactured products are an example of social innovations. Based on the data from the National Court Register, the activity profile, employment level, period of operation, founding entities and the financial situation of the analysed units were examined using the dynamics index method. The research results show that working together is beneficial both financially and socially. All the surveyed entities achieved an increase in revenue compared to the previous year. Thanks to the initiatives, socially excluded people found support and employment.

**Keywords:** consortia, social economy entities, social innovations.

## 1. Introduction

Social innovation is aimed at improving the quality of life in society, with particular emphasis on those groups and areas where there is a real need. This situation applies to socially excluded people, i.e. people with disabilities, the homeless, the long-term unemployed or those suffering from addictions. Such people can find employment in social economy entities, i.e. social cooperatives, enterprises of professional activity, foundations, social integration centres, associations and non-profit companies.

In order to achieve greater benefits, these entities can cooperate with each other in the form of informal agreements creating a so-called consortia of social economy entities, which in this form are a manifestation of social innovations. One should clearly distinguish “innovation” as a creative attitude that goes beyond the existing patterns of thinking and acting from “innovation”, treated as the production, acceptance and implementation of new ideas, processes, products and services (Baregheh, Rowley, and Sambrook, 2009, p. 1334). Social innovations, therefore, are new solutions that simultaneously satisfy social needs and lead to new opportunities and relationships, as well as the better use of resources and means. In other words, they are elements of social change and at the same time create such changes (Howaldt and Schwarz, 2010, p. 28). According to the OECD, social innovation seeks new answers to social problems that support: (I) the identification and delivery of new services that improve the quality of life and the community; (II) the identification and implementation of new labour market integration processes, (III) new market competences, (IV) new competences, (V) new jobs and new forms of participation as various elements that contribute to improving jobs on the labor market (Noya, 2011, p. 21). The Theoretical, Empirical and Policy Foundations for Social Innovation in Europe (TEPSIE) established the main features and components of social innovation. The indispensable features of social innovations are: creating new relationships, intersectorality, openness and cooperation, assumptions of prosumption and co-production, bottom-up, interdependence, the creation of new opportunities and resources, and the more effective use of means and resources. The elements of social innovation include: innovation, efficiency, increasing the social potential for action, leading from idea to implementation and responding to real social needs (Caulier-Grice, Davies, Patrick, and Norman, 2012, p. 18). The listed features and elements are characteristic of consortia of social economy entities.

## **2. The aim, material and methodology of research**

The aim of the article is to present the functioning of consortia composed of various legal forms of social economy entities. These are examples of social innovations, and therefore the phenomenon is still not very common in Poland. Based on the 2018 amendment to the Act on Social Cooperatives (Act of April 27, 2006...) it is possible to establish such entities by social cooperatives, but no legally functioning ones have yet been established. There are a few mentioned in the Internet, but their members are not reliable and do not fulfill their reporting obligations. Hence the subject of research are three consortia operating under the brands: “Klunkry”, “Panato Bag”, and “Juchowo Farm”. Detailed data on the founders, business profile, year of establishment, cooperating entities, products, sales market, number of employees and the financial situation of individual entities were obtained from the National Court Register data and from personal interviews with consortium members. The subject of the research were reports on activities and current financial statements, balance

sheets, and profit and loss accounts. The selection of entities for research was guided by the fact of submitting the financial statements and operating on the market from at least 2017. The amount of income reflects the financial situation that allows to determine the activity of the enterprise, and at the same time is a benchmark when assessing the amount of profit and involvement of resources. The collected data were analysed with the use of dynamics indices (previous year = 100), taking into account their revenue obtained in 2017 and 2018. The financial values are given in thousands and rounded to full zloty.

### 3. Legal forms of social economy entities

The foundation on which the social economy rests is human interaction. Social economy entities are oriented towards social utility, they do not distribute a profit or balance a surplus among themselves, but allocate it to strengthening the company's potential, professional and social reintegration and public benefit activities conducted for the local community. Their characteristic feature is that, on the one hand, they employ people who need support, and on the other, they have to stay in the market just like any other economic entity. The social economy sector is complementary to the market and the state. The literature emphasizes the importance of social entrepreneurship in creating socio-economic potential and local development (Becker and Murphy, 2000; Defourny, Hulgård, and Pestoff, 2014; Guo and Bielefeld, 2014; Greffe, 2007). In Poland, social enterprises can exist in various legal forms. The legal acts on the basis of which they operate determine the principles of their operation, i.e. the legal personality, the possibility of running a business and the sources of their financing.

**Table 1.** Characteristics of the legal forms of social economy entities which are members of the surveyed consortium

Legal forms	Legal act	Legal personality	Running a business	Sources of financing
social cooperative	Act on social cooperatives	Yes	Yes	own resources + subsidies
Enterprises of Professional Activity (EPA)	Act on vocational and social rehabilitation and employment of disabled people	No	Yes	resources of the State Fund for Rehabilitation + own resources + 1%
Social Integration Centers (SIC)	Act on social employment	No	No	subsidies +1%
associations	Act on associations	Yes	Yes	own resources + 1%
foundations	Foundations act	Yes	Yes	own resources + 1%
non-profit companies	Code of commercial companies	Yes	Yes	own resources + 1%

Source: own study based on legal acts.

Social cooperatives with a legal personality are best suited to running a business. Pursuant to the Act on social cooperatives (Act of April 27, 2006...), apart from running a business based on the personal work of its members, the organization works for the social and professional reintegration of people excluded or being at risk of social exclusion. The subject of the cooperative's activity may also be social, educational and cultural activities for its members, employees and the local environment, as well as socially useful activities in the sphere of public activities. Enterprise of Professional Activity (EPA) – operates on the basis of the Act on vocational and social rehabilitation and employment of disabled people (Act of August 27, 1997...). EPA has no legal personality and functions as a separate unit within the institution or organization that the EPA has established. The income from the economic activity and tax exemptions of the EPA must be allocated entirely to the company's activity fund, which may be used to finance, among others: supporting the independent functioning of people with disabilities in the workplace, improving the working conditions of people with disabilities, the purchase of equipment, education, retraining and training of disabled people, recreation and participation of disabled people in cultural life, help in meeting other social needs and the needs related to the social rehabilitation of employed disabled people. Center for Social Integration (CSI) – is an institution for professional activation and counteracting social exclusion operating on the basis of the Act on Social Employment [Act of June 13, 2003...]. CSI is an educational institution, and one of the elements of education may be the work of its participants as part of a commercial, service or manufacturing activity. Such activity does not constitute running a business within the meaning of the Entrepreneurs' Law. CSI participants have the status of unemployed, and from the CSI they receive an integration benefit in the amount of the unemployment benefit. Social enterprises can also be non-governmental organizations, i.e. associations or foundations that use economic instruments in their activities to achieve social goals. These entities have a legal personality and operate pursuant to the law on associations (Act of April 7, 1989...) and the Act on Foundations (Act of April 6, 1984...). Profit from the business activity should serve the statutory activity and may not be shared between the employees, members or founders. A capital company can also be a social enterprise. According to the Code of Commercial Companies (Act of September 15, 2000...), one can establish a limited liability company as well as a joint-stock company, not only for profit, but also for non-profit purposes. Companies may be established by natural persons and legal persons, e.g. by foundations or associations. These enterprises allocate all their income to the implementation of statutory objectives. Social economy entities may conduct public benefit activities and apply for the status of a public benefit organization, which is associated with receiving 1% of personal income tax. The group of social economy entities also includes occupational therapy workshops, social integration clubs and consumer cooperatives, but these legal forms do not exist among the members of the consortia studied.

#### 4. Consortia of social economy entities

A consortium is a type of informal association that operates on a contractual basis (similar to a civil company). By the agreement, the members of the consortia undertake to cooperate within the scope specified by them. Organisational forms are important for any kind of innovation, but particularly for those that are truly systemic in nature. These invariably involve more than a new service or model: they also create a change in relationships of power, and a change in how people think and see. Invariably, systems changes stretch far beyond the boundaries of any single organisation (Murray, Caulier-Grice, and Mulgan 2010, p. 7). The aim of establishing a consortium is to increase the economic and social potential of the associated entities, jointly organize a network of production, trade or services, and organize the joint promotion of activities. The promotion of a common trademark, e.g. a common brand, product or offer, also plays an important role. Scaling out includes several different strategic pathways to grow an organization, of which franchising is just one option, along with other strategies such as licensing activities or joint ventures. If the intention of the organization is to maintain absolute control over all aspects of organizational growth, then the risks (financial, reputational, potential for local success, and so on) would be high. In this case, an organization might consider scaling out via a network of wholly owned satellite entities or other such structures that allow for high degrees of control (Hurley, 2016, p. 26). This is the case with the analysed entities. The founders ensure that the quality of the products is high and choose the members, or, as in the case of Juchowo, they themselves create co-participants.

**Table 2.** Characteristics of the studied consortia

Brand (common name)	"Klunkry"	"Panato Bag"	"Juchowo Farm"
Founders	Regional Center for Social Assistance (RCSA) in Poznań	social cooperative "Panato"	Stefan Karłowicz Foundation
Year of creation	2017	2016	2017
Cooperating entities	4 (social cooperative + EPA+ company non-profit + SIC)	7 (social cooperative + 2 EPA+ company non-profit + foundation + 2 associations)	5 (foundation + social cooperative + EPA+ 2 company non-profit)
Products	souvenirs from Wielkopolska	bags and backpacks	ecological food
Market	Wielkopolska area	Poland and abroad	Poland and abroad

Source: own study based on data from reports.

Social innovation can be the result of the activities of the public, private or non-profit sector, as well as the local community or individual entities (Harris and

Albury, 2009). The initiator of the creation of “Klunkry” was the Regional Center for Social Assistance (RCSA) in Poznań, which obtained funds to create a brand under the EU program “Coordination of the development of the social economy in the province of Wielkopolska”. “Klunkry” is a name derived from the local dialect, meaning souvenirs, i.e. small regional gifts. Four entities of the social economy participate in the project: the social cooperative “Furia”, which employs people with autism, the Social Integration Center founded by the Social Emergency Association, employing homeless people – both from Poznań, and the Piła: “MDU” non-profit company and Enterprises of Professional Activity (EPA) employing people with disabilities. A specially hired consultant designed gifts for each of the four entities, taking into account, among others, the possibilities of each of them and who works in the entities. The other two consortia were formed from the bottom up. The founder of “Panato Bag” was the “Panato” multisector social cooperative. The consortium was established for a business need. The immediate cause was the rapid increase in orders in the cooperative, which was not able to fulfill the incoming orders with its existing resources. The implemented innovations also have a significant impact on increasing production efficiency. In 2017 the automation of most of the processes taking place in the network was implemented, thanks to software co-financed under the Social Innovation “Panato Bag Distributed Production Network”. The resulting consortium is able to produce approximately 10,000 items of their products per month, mainly due to the full standardization of production and a specially prepared management tool (proprietary ERP software). The consortium consists of seven constantly cooperating social economy entities – the social cooperative “Panato”, the foundation “JUMP”, two EPAs from Piła and Ruda Śląska, “MDU”, “TPD” Wieruszów and the Humanitarian Aid Association. Membership in the networks is closed – in order to become a member of the “Panato Bag” network, one had to go through a three-stage recruitment stage consisting of prototyping, testing and admission to the consortium. The organization is still looking for partners who have at least a few people with sewing experience. A necessary condition for cooperation is the fact of being a social enterprise. The founder of the “Juchowo Farm” consortium is the foundation of Stefan Karłowicz from Juchowo. On the initiative of this organization, in 2004 “Agricultural Company Juchowo” started to run a large-scale farm producing fully ecological agricultural products and raw materials. The foundation, wishing to implement the Juchowo biodynamic farm project, made large investments in modern barns, the purchase of animals, agricultural equipment and modern production technologies. On the initiative of the foundation, in 2017, the “Construction group” social cooperative was established, and in 2018, “Juchowo Cellar” a non-profit cheese producer, and Enterprises of Professional Activity for 50 people. The consortium in Juchowo brings together entities within its commune, “Klunkry” within the region and “Panato Bag” members are entities from all over Poland. “Klunkry” sell their products in the Wielkopolska voivodeship, while the other two consortia both in Poland and abroad. Juchowo is particularly active in

this field, and exports milk, cheese, bakery products, fruit juices, herbs and other products to European countries, especially to Germany, Sweden, the Netherlands and Norway. Social entrepreneurship is associated with opportunity rather than necessity with the innovative process and activities, with employment generation and with international activity (Silva and Poza, 2017, p. 20). The products offered by the consortia are unique and fill the niche. “Klunkry” are souvenirs in the form of magnets, key rings, bags, aprons, notebooks in felt covers. The design lines refer to the symbols of Wielkopolska, i.e. the symbolic for Poznań goats and potatoes. “Panato” has created a unique program using proprietary software, thanks to which the customer can select all parameters by himself/herself using the on-line configurator and will have a backpack or bag exactly for their needs. Food products from Juchowo are in great demand because they are ecological and meet the highest standards, and there are more and more people who eat ‘consciously’. All the entities sell via the Internet and at stationary points. The founders deal with strategic issues, design and external communication. Their task is to promote their products on the Internet. They are active in social media – run a website on FB, Instagram and participate in trade fairs and events. The established consortia, apart from contributing to the employment of disadvantaged groups, organize social initiatives. The investment activities serving the farm and the local community in Juchowo include melioration works and the establishment of ponds as part of the regulation of water management. At the same time, the rural project implemented by the consortium includes the environmental education of adults and children (pedagogical projects, training, workshops, conferences, seminars), the professional integration of the disabled (sociotherapeutic projects), research in the field of biodynamic agriculture (national and international research projects), increasing the level of knowledge and culture of the local community and rebuilding the rural culture (Łącka, 2015, p. 160). The “Panato Bag” consortium is also active for the benefit of the local community, which conducts projects initiated by partners aimed at enriching the opportunities offered locally. All these issues are carried out by the cooperatives by organizing workshops, panel meetings and debates, consultancy, working groups and actions in the public space of the city of Wrocław, especially the Nadodrże district. The organization works within the cultural and creative sector to create new jobs and counteract unemployment, especially among people who are just starting their professional activity. “Panato” organizes networking meetings for designers, accepts students of the Academy of Fine Arts for apprenticeships and is a member of the Silesian Industrial Design Network (Błażejowska, 2018, p. 75). “Klunkry” contributes to the promotion of the region and the social economy. They organize promotional campaigns with the participation of famous people, spreading the knowledge about social entrepreneurship and familiarize themselves with the field previously unknown to most people. Most social innovations start small and stay small, but to tackle the problems entrenched in our societies, we need more social innovation at scale. The authors see scaling as a distinct stage in the process

of developing social innovation, because the skills needed and activities involved are different from those required at other stages (Bound and Mulgan, 2019, p. 119). Due to the nature of social entrepreneurship, the people who create them are open to cooperation, do not perceive themselves as competition and willingly share their experience. Such a situation occurred when creating “Klunkry”. Members of the “Panato” consortium not only created an innovative network management mechanism, but also jointly developed a good practice manual for scaling to other industries. Therefore, they took part in the creation of the Wielkopolska consortium, training people in proven technology and providing valuable advice and tips.

## 5. Financial results of consortia members

In order to verify the economic efficiency of the surveyed entities, the dynamics of revenue and the amount of profit were examined. Only those entities that are required to submit financial statements to the National Court Register were taken into account – i.e. social cooperatives and non-profit companies. As shown in Table 3, all the surveyed entities achieved an increase in their revenues compared to the previous year.

**Table 3.** Financial results of the analysed entities

Social economy entities	Revenues in 2017 [in thous. PLN]	Profit in 2017 [in thous. PLN]	Revenues in 2018 [in thous. PLN]	Profit in 2018 [in thous. PLN]	Revenue dynamics	Profit dynamics
s.c. “Panato”	7486	11.1	1133.9	30.3	151.47	272.97
“TPD” Wieruszów	308.6	21.3	311.3	2.7	100.87	12.67
s.c. “Furia”	77.8	-28.1	118.5	-4.7	152.31	597.87
“MDU” c.n.p.	30.5 (with subsidy 139.4)	34.9	112.9	3.0	270.15	8.59
s.c. “Construction group”	286.9	-21.8	809.2	-45.1	282.05	48.33
Juchowo c.n.p.	8095.5	512.4	8756.2	43.2	108.16	8.43

Source: own study based on data from reports.

The largest increase was recorded by the social cooperative “Construction group” from Juchowo. This was due to the fact that it was established only in June 2017, so the revenue was only from the middle of the year. The organization was established by a foundation for the development of a consortium that required new farm buildings and the renovation of old ones. The cooperative made significant investments in the



form of the purchase of fixed assets which it amortises and which constitute tax deductible costs and therefore caused a loss. A significant increase in revenue was also achieved by “MDU” from Piła, which in 2017 generated the revenue of PLN 139.4 thousand, including economic activity of PLN 30.5 thousand and 82% of the revenues was from subsidies. It should also be noted that social enterprises employ people with disabilities and social exclusion, who therefore have lower labour productivity and higher costs of goods and services, and therefore use public aid, which fosters self-sufficiency or profit. The granted subsidy financially strengthened the entity under development. Thanks to the support, the company developed its potential and earned almost three times more from its independent operations in 2018, i.e. PLN 112.9 thousand. This was largely due to the simultaneous participation in two consortia – “Panato Bag” and “Klunkry”. A significant increase in revenue (by 50%) and profit (by 270%) was recorded by the “Panato” cooperative – the founder of the consortium. Thanks to the very professional management structure in the enterprise, effective promotion and mutual cooperation, the cooperative has developed very well, is appreciated and won awards in numerous competitions. The “Furia” social cooperative also has a favourable financial result. The company was founded in 2014 on the initiative of two non-governmental organizations: the FURIA Active Foundation and the FIONA Foundation for the Integration of Disabled and Autistic People. Thanks to the participation in the consortium and new orders, the organization recorded a significant increase in revenue and a reduction in its loss from PLN 28.1 thousand down to PLN 4,7 thousand. Members of “TPD” Wieruszów increased the salaries of employees, therefore the profit is lower than in the previous year, with comparable revenues, but the employees are more motivated. A stable financial situation is represented by the company from Juchowo, which from its many years of activity has generated very high revenue amounting to over 8 million PLN. The profit earned is allocated to statutory objectives consisting in the development of the consortium.

## 6. Conclusion

The activity of the founders played a key role in the formation of the consortium. Only thanks to their initiative could social innovations emerge. They rely not only on the functioning of consortia of social economy entities composed of various legal forms, but also on an innovative management mechanism and the production of innovative products. The conducted research has shown that their activity brings economic and social benefits. All the surveyed entities are in a good financial condition and achieved a significant increase in their revenues compared to the previous year, owing to which they thrive and invest. The social benefit of cooperation is: building the scale of production and generating new jobs, promotion and building the image of the social economy sector among customers and target recipients of products, and an increase in competences in the field of cooperation between network members.

As a result, the partners were integrated and motivation increased, and shared trust and loyalty developed. The resulting consortia create conditions for the creation of initiatives and structures functioning for the benefit of the local community, thus limiting the area of social exclusion, increasing the social competences of people remaining outside the labor market and expanding the activity of residents. Consortia as social innovations are an unusual remedy for typical social changes, and are the initiatives that other actors should follow.

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## SPOŁECZNE INNOWACJE NA PRZYKŁADZIE KONSORCJÓW PODMIOTÓW EKONOMII

**Streszczenie:** Celem artykułu jest przedstawienie funkcjonowania konsorcjów złożonych z podmiotów ekonomii społecznej o różnych formach prawnych. Przedmiotem badań są konsorcja działające pod marką: „Klunkry”, „Panato Bag” i „Juchowo Farm”. W ich skład wchodzi spółdzielnie socjalne, zakłady aktywności zawodowej, fundacje, stowarzyszenia, centra integracji społecznej oraz spółki z o.o. *non profit*. Wzajemna współpraca różnych form prawnych podmiotów ekonomii społecznej, innowacyjny mechanizm zarządzania i wytwarzane produkty stanowią przykład innowacji społecznych. Na podstawie danych z KRS zbadano profil działalności, poziom zatrudnienia, okres prowadzenia działalności, podmioty założycielskie oraz sytuację finansową analizowanych jednostek przy wykorzystaniu metody indeksów dynamiki. Wyniki badań wykazały, że wspólne działanie jest korzystne pod względem finansowym i społecznym. Wszystkie badane podmioty uzyskały wzrost przychodów w porównaniu z rokiem ubiegłym. Dzięki powstałym inicjatywom osoby wykluczone społecznie znalazły wsparcie i zatrudnienie.

**Słowa kluczowe:** konsorcja, podmioty ekonomii społecznej, innowacje społeczne.