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Social enterprises in culture and the arts: institutional trajectories of hybridisation in the Portuguese changing cultural mix

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ABSTRACT

Arts and culture gained multiple presence in individual and social life, with economic presence gaining relevance. We focus on social enterprises (SE) in arts and culture standing between the economic-oriented focus on arts and culture, and its socio-political and cultural roles and embeddedness. SEs are characterized by the centrality of a social mission instead of profit and participatory governance. We asked what are SEs in arts and culture and how they are influenced and aim at influencing institutional contexts. We place the research in the context of the Portuguese cultural mix. Based on five in-depth case studies of organisations oriented to the promotion of arts and culture that have social and community interventions, organisations where arts and culture are the main tools for social intervention and social welfare organisations with arts and culture projects, we describe their trajectories and organisational social, economic and governance characteristics. We argue that there is a mix of institutional entrepreneurship, public policies (and their lack) and societal trends influencing SEs pathways towards hybridisation.

1. Introduction

The development of cultural discourses and policy frameworks have brought a broad regard of the roles of arts and culture, associating the expressive and aesthetic dimensions with instrumental perspectives such as the objectives of cohesion/social inclusion, sustainable development or economic growth. As argued by Jameson (1991, 48), culture abandoned its semi-autonomous scope and its relevance exploded and spread 'to the point at which everything in our social life – from economic value and state power to practices and to the very structure of the psyche itself – can be said to have become 'cultural' in some original and yet untheorized sense'.

In 2015, the international development agenda mentioned culture as transversal to the economic, social and environmental dimensions of the UN's Sustainable Development Goals (Duxbury, Kangas, and De Beukelaer 2017). At a regional level, the European Union assumes culture strategic social, economic and external relation objectives (European Commission 2018). European cultural policy and policy with impact on the cultural sectors have included the promotion of European culture and European cultural initiatives, the promotion of a European identity and culture and the development of cultural industries.

The neoliberal turn, initiated in the 1970s, affected the legitimacy and extent of the roles of the state and public institutions in the field of culture (Yúdice 2003). Since the end of the 20th century, cultural policies have been oriented towards creative industries, based on the idea that culture can contribute to economic growth, urban renewal and local development (Nogales 2017). Thus, the state has been changing its role towards culture, first by slimming down their involvement in favor of the expansion of private initiative, and then, by producing policies reorienting culture towards economic goals.

Several criticisms have emerged, such as the lack of recognition of the creative and innovative dimensions of artistic and cultural initiatives and their enmeshing in society (Nogales 2017), the perverse consequences of the creative economy discourse and framework, leading to individualization of the creative workers, under-employment and precarious work conditions and contractual ties (McRobbie 2011).

The instrumentalization of arts and culture associated to intensifying commodification (McQuilten and White 2015) led some authors to turn their attention to alternative organizational models for arts and culture. Social enterprises (SE) are seen as having economic, social, political and aesthetic benefits such as 'greater independence from institutional and commercial demands in art practice while promoting greater transparency in terms of work conditions and profit distribution in the production and sale of art' and 'greater space for artistic and social critique, along with the potential for collective action and engagement in civic life' (McQuilten and White 2015: 8), as arts and culture are traditional sites of critique and resistance with a close link to civil society, participation and politics (Mahoney, Lesage, and Zuurbier 2021). England (2020) argues that SE are able to drive economic growth and social inclusion through creative practice and production. McQuilten and White (2015) point to the fact that SE allows reducing the creators' dependency on a singular source of funding, making it possible for artistic freedom and critical thought. McRobbie (2011) proposed 'radical social enterprises', as an alternative to the creative economy.

SEs emerged in the 1990s, as an evolution of the effects of welfare state retrenchment in non-profits in the USA, and organisational innovations the social economy in Europe (Defourny and Nyssens 2012; Young and Lecy 2014). Differently from the Anglo-Saxon approach, which focuses on the balance between social mission and market, in Europe, SEs are described as being characterized by the centrality of a social mission, privileging the interests of their members, the community or society, instead of profit, assuming an economic risk and functioning through participatory or democratic governance. Their orientation to the general interest and to addressing social and societal challenges help to explain the growing interest of public policies (European Commission 2020).

Social enterprise studies are consolidating, most predominantly, in policy fields such as social welfare, education, health or employment, but it is still incipient in arts and culture. The few existing works show the relevance of the concept to discuss the transformations in arts and culture.

We focus on the case of Portugal, where the non-profit sector has been playing a relevant role as state partner in fields such as culture and arts. The cultural mix in Portugal involves the roles of government, national and local, not-for-profit organizations, and for-profit organisations. The government acts as patron, regulator and entrepreneur (Garcia et al. 2016), assuming an inescapable role, especially to non-profit organisations (Borges and Lima 2014).

The cultural and artistic sector in Portugal has been the object of irregular public policies and of public investment (Garcia et al. 2016). The market, on the other hand, is a source of limited financial sustainability since culture-related household mean expenditures in Portugal are the fourth lowest in Europe (European Union 2019). The panorama regarding the consumption of arts and culture in the Portuguese society is one of scarce participation and lack of interest (Pais, Magalhães, and Antunes 2022), conditioned by socioeconomic factors that constrain the access for disadvantaged social groups. Art and cultural organizations are fragile, and the artists and other workers face huge job insecurity and weak social protection, being one of the most precarious sectors (EENCA 2015).

The Portuguese cultural sphere still suffers from its past; during the Estado Novo dictatorship. In a period of state censorship of artistic expression and freedoms and of extremely high levels of illiteracy, the culture did not flourish. With the Democratic Revolution of 1974 there was the first

moment of consensus on the need for public investment in culture. It was then that the right to culture was written into the Constitution of the Portuguese Republic. However, it was only until the 1990s that was there unprecedented investment in the field, particularly at the urban level (Fortuna and Abreu 2001). This period was followed by a decline in investment in culture after the 2000s, common to different governments of different parties (Garcia et al. 2016). The decrease in public investment coexisted with a strong dependence on the European Union, both financially and politically (Garcia et al. 2016; André and Vale (Org) 2014) and with processes of decentralization of cultural policy and financing (Silva, Babo, and Guerra 2013).

In Portugal, not-for-profit organizations in the field of arts and culture have been pointed out as being particularly good solutions for problems afflicting the sector, and addressing broader societal questions (Marques 2021), reducing inequality and promoting local development (Rego and Borges 2021). Marques (2021) analyzed theater collectives in Portugal pointing to its potential for transforming society in emancipatory ways. She framed these organisations as capable of defying the status quo of employment and social precarity by proposing collective emancipatory responses oriented towards social change.

The aims of this article are 1) to shed light on SE in the field of arts and culture, which are still little known and understudied, to better understand their characteristics and roles and 2) to describe how SEs developed within a particular institutional context, such as Portugal, and show how their trajectories toward hybridisation helped them to transform and to contribute to institutional change.

We propose a discussion on trajectories and characteristics of SEs that develop activities in the field of arts and culture based on in-depth analysis of five different cases. We start with a review of relevant debates in arts and culture and the emergence of SE. We then present our analytical and methodological framework. In the empirical part of the article, we describe the trajectories of the studied SEs and characterise them along their social, economic and organisational features. In an analytic section, we reflect upon the influence of the institutional framework in arts and culture SE and the ways SE try to influence this framework.

2. From cultural industries to social enterprises

Social science literature tends to describe the historical development of the universes of art and culture ('fields', in Bourdieu's expression; 'worlds' in Becker's expression) as autonomous spaces of social activities. They are structured by more or less complex organisations of different character (profit and non-profit) which are oriented and articulated by specific conventions and singular logics of coordination and justification (Abreu 2015; Boltanski and Thévenot 2006). Adorno's works, first with Horkheimer (1947) and then individually (1975), introduced the concept of the 'cultural industry' that highlighted the way in which important segments of artistic and cultural activities developed, throughout the 20th century, in harmony with the capitalist logic, capable of subordinating artistic creation to the hegemony of technical rationality and the purpose of profitable accumulation, transforming cultural goods into objects for mass consumption. This reflection has had a strong impact on the field of social sciences and inspired the development of vast critical literature on the cultural industries (Oakley and O'Connor 2015). However, this did not prevent the recognition that, despite Adorno's pessimism, many of the arts and culture sectors have remained outside a strictly capitalist model, as the works of DiMaggio have shown (1986, 2006). Non-profit cultural organisations have a long tradition in the fields of culture, whether they are public or private organisations, and operate in different segments of cultural activity – the most erudite to the most popular, alongside profit-making organisations.

Governments have historically assumed different responsibilities in relation to the sphere of cultural activities: in the constitution of fundamental institutions for the safeguarding of the cultural and artistic heritage of nations (e.g. libraries, museums, archives); in the framing and regulation of capitalist markets for cultural goods; in direct or indirect support for cultural activities and organisations; in the promotion of initiatives and events that respond to the needs and interests of populations, territories or institutions.

Working in areas that are often less alluring to the for-profit sectors and said to offer organizational models in line with the logic of creative work and the many specificities of artistic work, non-profit organisations have been the object of public and private support, justified on the basis of principles of response to general interest. In fact, the different models of cultural policies in different national contexts have developed on the basis of these principles (Bell and Oakley 2015).

At the turn of the century, several studies (KEA 2006; Mateus 2010) revealed the economic weight of cultural and creative activities, accompanying a change in the discourses and cultural policies in Europe. These have started to emphasize the importance of the contribution of arts and culture to the economic development of territories, to social and territorial cohesion, to the identity of places and regions and to their competitiveness. In a short period of time, most public and/or European Union funding instruments started to incorporate this logic, forcing the organizations most dependent on such funding (the non-profits) to reinvent themselves, reducing their structures, reducing numbers of people on permanent contracts by resorting to greater use of provisional contracts, diversifying their activities and funding sources or, even more so, changing location and projects in order to adapt to the new funding rationale (Borges and Veloso 2020).

The concept of social enterprise assumes different meanings shaped by institutional contexts and history (Kerlin 2017). The Anglo-Saxon tradition pays more attention to business characteristics and new ways of operating in the market economy (Young and Lecy 2014). Within this tradition SEs are seen somewhere in the middle of a continuum, or mixing features, between social or non-profit organisations and economic or profit-oriented enterprises (Alter 2007; Dees 1996). Within this framework SE in arts and culture are described as balancing the artistic and cultural, the social and the economic goals (McQuilten et al. 2020). The European approach (Defourny and Nyssens 2012) also mobilizes social and economic dimensions but adds a third one, stemming from the European tradition of the social economy and the third sector: the dimension of governance.

Another difference lies in the explanations for SE emergence. While the Anglo-Saxon tradition tend to explain the emergence of SE as a result of failures of the state and of the market, the European approach prefers explanations of SE as contextually shaped and influenced by different institutions in their institutional trajectories. Thus, different types of SE are said to emerge from different trajectories between the mutual, the public and the capitalist (Defourny and Nyssens 2017).

In both traditions, SEs are often seen as hybrids, combining different logics (Doherty, Haugh, and Lyon 2014). In arts and culture, SE hybridisation debates point to the presence of social, economic, political and creative and artistic logics/goals, with different mixes.

Thus, in arts and culture, SE are defined as organisations that produce 'goods and services that channel expressive needs and aesthetic sensibilities' (Barbieri, Fina, and Subirats 2012, 7) and organisations articulating artistic and aesthetic dimension with an economic one, aiming at reformulating the social and production relations (Marques 2021). In terms of legal and organizational forms they may include 'foundations, associations, platforms, exchange networks, cooperatives and even other types of organisations run along commercial lines' (Barbieri, Fina, and Subirats 2012, 7), just like SE in general (Borzaga et al. 2020).

3. Analytic and methodological framework to study social enterprises in arts and culture

Within the European approach, SEs are conceived as:

> Private not for profit organisations that provide goods and services directly related to their objective of benefiting the community. They generally have a collective dynamic which involves several types of stakeholders in their governance bodies, value autonomy and support economic risks related to their economic activity (Defourny and Nyssens 2008, 204).

This approach works with a concept of social enterprise as an ideal type with three dimensions. In the social dimension, an explicit aim to benefit the community, the initiative of a group of citizens or civil

society organisations, and rules constraining the distribution of profits. In the economic dimension, a continuous activity producing goods and/or selling services, a significant level of economic risk and a minimum amount of paid work. In the governance dimension, a high degree of autonomy, a decision-making power not based on capital ownership and a more participatory nature (Defourny and Nyssens 2012).

We adopt an institutionalist approach which pays attention on how SEs are shaped by the institutions in their context. These influences include the hard effects of legal frameworks and access to resources to soft effects of culture, discourses and power distribution amongst the actors in their field. Legal frameworks, the welfare state, the agency of civil society and its relation with the state have been pointed out as influencing SEs (Kerlin 2017).

The concept of SE, like that of social entrepreneurship (Mair and Marti 2006) is associated to institutional innovation, emerging in the form of new types of organisations (Tracey, Phillips, and Jarvis 2011) and of the effect of these organisations' activities in existing institutions. Thus, SEs can be conceived as institutional entrepreneurs (DiMaggio 1988) changing their institutional contexts, including not just their social and cultural effects but also the political ones, as diverse as those which Najam (1999) found for non-governmental organisations.

In this study, we aim at answering to three questions: 1) What are the characteristics of SEs in arts and culture? 2) How were their trajectories influenced by institutional frameworks? 3) How do they try to influence institutional frameworks?

To answer these questions a qualitative approach was mobilised. We conducted five in-depth case studies of arts and culture organisations and organisations working with arts and culture (Yin 2009). We triangulated several techniques of production of empirical data such as organisational document analysis, semi-structured interview and structured interview.

To characterise SEs we used indicators of the three dimensional definition. For the social dimension we collected information on origin, mission, goods and services produced and surplus distributing rules. For the economic dimension, income sources, prices, number of paid and unpaid, voluntary workers were considered. In the governance dimension, governance bodies, decision-making rules, stakeholders and asset lock were within our scope. Semi-structured interviews allowed to discuss with interviewees issues related to trajectories, influence of institutional frameworks, organisational changes, economic model and governance and strategies to influence policy and society. To perceive how SEs try to change institutions we collected information regarding their strategies to influence policies and society.

In his attempt at measuring the arts and culture non-profit sector, DiMaggio (2006) proposed the following typology: 1) registered arts organisations; 2) arts organisations and programmes embedded in non-arts organisations and; 3) informal associations, artists' collectives, sole proprietorships with mixed commercial/non-commercial aims, networks, etc. In Portugal, the statistics of culture do not distinguish between non-profit and commercial arts organisations and the social economy statistics count SEOs registered in the fields of culture, communication and recreation, 47% of the total social economy (INE/CASES 2016). There is sadly no statistical source of information regarding programmes embedded in non-arts organisations.

The sample analyzed was non-probabilistic and taken from a database of Social Enterprises in Portugal constructed in the scope of the broader project with a preliminary exploration of SE criteria from publicly available information. Units were selected by criteria, based on their hybridization of social and cultural/artistic goals and diversity.

We studied three distinct groups: 1) organisations oriented to the promotion of arts and culture that have social and community interventions; 2) organisations where arts and culture are the main tools for social intervention with disadvantaged groups; 3) social welfare organisations with arts and culture projects.

In each case study, we collected and analysed statutory documents, activity reports and plans and other organisational documents, news pieces, organisational websites and social network pages. Five structured and ten semi-structured interviews were conducted with chairs of the boards of directors and managers or equivalent.

A thematic analysis was then conducted for each case. As agreed with participants, anonymity will be maintained regarding both interviewees and organisations.

4. Different trajectories of hybridisation: the cases

In this section, we introduce the five cases and summarize their trajectories. We pay attention to mission and activities' changes and organisational and contextual influences. This section highlights the institutional influences in SE hybridisation trajectories. We identify three types of trajectories.

Within a **trajectory from arts to social intervention** we studied a professional theatre company. With the legal form of a non-profit association, it was created in the 1990s by a group of arts and education teachers and artists, the period where public investment in culture was more significant. Responding to policy priorities it established close links with schools with the support of the Ministry of Culture. After 2001, it diversified its audiences and activities due to the installation of the company in an adapted building, supported by a governmental program. This allowed the creation of an educational service with theatre classes, which became an important contribution for sustainability both for generating income and for mobilizing people to be involved in the company. In 2008, within the governmental policy to create professional companies it was given the management of a theatre by the municipality under two protocols, one for management of the space, which included the responsibility for programming, and one for artistic creation and production of the company. In the context of the financial crisis and the following period of austerity, the Ministry of Culture suspended funding between 2013 and 2017, which led the company to perceive the high dependency on few sources of funding as a vulnerability. This led to a diversification strategy of the funding sources and types of funding which, in turn, contributed to further diversification of its activities.

Structural funding from national and local governments help to secure regular artistic productions and co-productions. The municipality also supports social intervention projects such as therapeutic intervention through arts for senior citizens, activities in local schools and a community project in a disadvantaged territory. Also supported by EU and philanthropy project funding, it puts in place capacity building activities for disadvantaged youth (inclusion through the arts) and for amateur groups and strengthening the cultural and artistic fabric of peripheral territories. Some of these projects are undertaken in collaboration with researchers under the logic of action research.

There is a coherence in the diversity of activities, with connection and synergies being established. The company sees arts in relation with society, and invites stakeholders to participate in the definition of its global project. Its artistic creations aim at promoting a 'critical look' and reflexivity in the public arena and, therefore, social transformation.

With a **trajectory from social intervention to arts** we studied an arts project in a social cooperative for persons with functional diversity. The cooperative was created in 1976, right after the Democratic Revolution, by professionals and parents, in the context of the significant social mobilization. In 2005, a therapeutic dance project was set up by a rehabilitation professional, conceiving artistic expression as a tool to overcome limitations of conventional therapies. This was due to the need to deal with a new public brought to the organisation due to policy changes, regular school students with physical and learning disabilities with aggressive behaviour. In 2011, the project evolved to a primarily artistic focus with invited choreographers. Since 2015 it started regularly presenting new choreographies and in the following year it started to organise a creative dance laboratory for dancers with and without disability. In 2018, it established as a dance company with 14 dancers certified in contemporary dance from the UNESCO International Dance Council. Finally, under another project, the dancers became teachers in workshops in local schools for students with special education needs. Through arts, persons with disability show the value of difference for artistic expression. This is sustained by the method DanceAbility®, an outcome of the evolution of contemporary dance to overcome the limits imposed by classical dance. The dance company is locally recognised as a cultural agent as we were told.

Since the beginning the project has been reliant on successive waves of public and philanthropic project funding for innovation in the field of disability. It never developed as a service of the mother organisation although it relies on two of its employees, some of its users as dancers, and in the physical infrastructure. There is a group of 3 to 10 dancers that work regularly with the company, voluntary or paid, depending on the availability of funding. It also receives internships and other forms of collaboration from local arts schools. Thus, the embeddedness in the organisation and external partnerships allows the project survival.

In the third case, **performing arts are the methodology of social intervention**. This is the case of a non-profit association created by a social entrepreneur and a group of artists, aiming at intervening socially with children and young people at risk through arts. The methodology was inspired by the experience of the founder while exiled in Paris. Social movements used arts as a tool for empowerment and the social economy as a tool for income generation to allow autonomy from the state. In returning to Portugal, after the Democratic Revolution of 1974, she started a project on social inclusion through the arts.

For the funding of the initial activities it relied on personal resources, the income of a restaurant set up to generate resources and corporate philanthropy. After five years renovating and adapting a derelict building lent by the government in return for services supporting youth at risk, it created a performing arts course for young people, with the support of the European Social Fund (ESF). In the early 1990s this course became a professional school supported by the Ministry of Education. Different from welfare organisations, it was quite late in its existence (in 2003) when it established a cooperation protocol with the welfare agency for a community centre. Later it also set up a youth residence and advice and support youth services under cooperation protocols.

Its professional company and other artistic activities are partially supported by the Ministry of Culture, through a plurennial contract, and income generated by the ticket office. It has developed projects with youth at risk supported by philanthropic grants. With project funding from the municipality, it created a group of elderly performers, to promote active ageing. A set of activities allow to generate resources such as a restaurant and a bar, arts courses for the community, sale of cultural animation shows for businesses and public agencies and tourist animation.

It provides a holistic response to young people at risk, from alternative curricula to the possibility of a career in the performing arts.

The fourth organisation also falls under the category of **SE where culture and arts are tools for social inclusion**. Is a non-profit association, self-described as a cultural association, created from the communitarian entrepreneurship of residents in an immigrants-mostly neighbourhood, to solve needs regarding urban infrastructure and children support. As many other welfare organisations in the 1980s developing in tandem with the late welfare state in Portugal, this organisation was quickly recognised by the welfare agencies, was awarded the status of Social Solidarity Institution, and signed the first cooperation protocol in 1989 for an after-school centre. Its development in the 1990s is also at pair with public policy priorities creating a kindergarten, a support centre for families at risk, certified training and employment support.

Cultural intervention is a building block of all areas of work. It put in place innovative methodologies to work with families at risk, conceived in partnership with a foreign higher education institution, and implemented innovative approaches to poverty and social exclusion funded by the ESF. Through working with culture and artistic expressions its methodologies challenge the disqualification of residents' knowledges and the racial bias of mainstream education and public services. It was one of the first organisations to train and place sociocultural mediators, later incorporated in public policy, and created teams of professionals and community members for social intervention.

Arts and culture are also mobilized to recognize the material and intangible cultural heritage of subaltern groups and to claim its place in Portuguese culture, as an aspect of its often ignored cultural diversity. Their cultural projects include two performance groups, a tour to the neighbourhood cultural traditions, a recording studio, which provides non-formal education in music

production, artistic residencies and exchanges and opportunities for local artists to produce their music, and a youth festival of music, cinema, literature, sports, theatre and dance. Its resources are primarily originated in government funding including diverse ministries, local government and EU funding. With its fluid organisational boundaries, it established several ways for the community to participate in its activities, and its main concern with market income generating activities is to channel this income to the community.

The last case responds to **social and economic problems of workers** in the creative, cultural and arts sectors. It is a culture and services cooperative created in 2014 by freelance workers in different artistic fields (cinema, theatre, dance, television) living the experience of the increasing fragility in a context where cultural policies encourage precarity, worsened by the financial crisis and the following austerity. Some of its founders were involved in social movements of precarious workers and in associations and labour unions defending the rights of the artists. The cooperative emerged as an immediate solution to this struggle.

The cooperative provides an equivalent to employee status for access to social security, and services such as collecting the *cachets* agreed upon between the artists and their clients, taxes and accountancy, legal support and representation and work accident insurance. Therefore, besides access to unemployment benefits and sick leave in more favourable conditions than self-employed workers, it provides services that make artists' lives much easier.

Precariousness in the cultural sector in Portugal is an extension of the low public investment in culture, the fragility of cultural structures, bad practices on the part of employers in terms of refusing to give contracts to artists that are permanent workers, and inadequate social security coverage. Although welfare legislation has been improving, particularly for the fake self-employed, that is, those workers which depend totally or mostly of one employer but do not have access to a work contract, the gaps of protection of freelancers remain, as became evident during the Covid 19 pandemic.

The cooperative relies entirely on member's fees which are paid as a percentage of their earnings. These fees are voted on by the members and cover the support structure. Changes in access and fees responded to the need to balance the organisation budget at the cost of excluding those with lower and more irregular earnings. Thus, there is the ambition to develop income generating activities that contribute to reducing the members' fee.

5. Characteristics of social enterprises in culture and arts

We now aggregate the analysis of the five organisations along the three dimensions of social enterprises of the European framework, describing how they fit into the SE criteria and combine the social, the economic, the governance and the cultural and artistic dimensions in different ways. Since there is no legal framework for SE in Portugal (Borzaga et al. 2020), the next pages intend to describe what are SEs operating in arts and culture in Portugal.

5.1. Social dimension

Three of the studied organisations had a social or a community movement in their origin and the remaining two were created by groups of citizens. In all studied organisations there are rules forbidding the distribution of profits, a guarantee for fulfilling the general interest orientation. This is inscribed in their legal framework as cultural associations, in specific statutes of Social Solidarity Institutions or general interest status or is a choice established in the organisation statutes in the case of one cooperative.

The missions and activities portray the variety of ways arts and culture contribute to the general interest. Four organisations provide artistic training and arts education for different types of publics. This includes workshops for professionals and for students of the performing arts and arts schools, placements and professional qualification for aspiring artists and arts classes or workshops for

amateur publics. Four of the organisations support access to culture, implying opportunities for everyone to enjoy and participate in a plurality of cultural and artistic activities, particularly those that are physically and symbolically distant from conventional cultural spaces. This includes the cultural production and programming activity, particularly in peripheral territories, communities and groups. It also includes promoting amateur practice, so that audiences become co-producers and opportunities for the involvement in artistic expression are broadened.

In two organisations cultural intervention is a building block of all areas of work, namely in education, social welfare, training and employment, community development and immigrants' rights. In two organisations cultural diversity means affirming the contribution of people with functional diversity and subaltern cultures to arts and to society.

SEs address the social exclusion of certain individuals or social groups. In the case of two organisations, artistic language and culture allows to articulate and strengthen collective identities and senses of belonging, for the formulation and awareness of collective problems, to make these problems visible and to empower communities. Two organisations work with performing arts and senior citizens, one from a therapeutic perspective and another from the perspective of active ageing. Social intervention through arts and culture also has social integration effects in cases of people with disabilities or people with special educational needs and youth at risk at two levels. On the one hand, offering alternative intervention strategies to conventional ones and, on the other hand, overcoming the stigma and promoting the value of difference in society.

In two cases there is an explicit political aspect of arts and culture, as this help creating public spaces. Through their artistic creations and productions, they seek to raise public and political discussions and questions. They also promote the creation and occupation of democratic public spaces, contributing to challenge the *status quo* and hegemonic meanings. In this sense, arts and culture are mobilized as an instrument for creating an agenda and framing political issues.

In terms of the social dimension and its articulation with culture and arts there appears to be no pattern distinguishing the three types of SE.

5.2. Economic dimension

Studied organisations produce goods and services and have paid staff. Those providing social services tend to have a higher number of staff while those with activities mostly oriented to culture and arts have less, which reflects the differences we also find in national statistics.[1] Three studied SEs see themselves as contributing to the promotion of artistic employment and quality of work through the creation of stable employment possibilities in artistic and cultural structures with consistent and long-lasting programming, training and placement of artists and better access to social rights. This is, however, a sub-sector where there is high number of self-employed, part-time workers as it happens in one organisation.[2]

All studied organisations bear an economic risk, combining multiple income sources, public, community and market. In organisations where artistic activities are prominent, sales to the public or members tend to be more important (varying from 21%, 49%) than in welfare organisations (8% and 10%), where subsidies or/and public funding are more prominent. These sales tend to include artistic production and ticket office as well as fees for arts' classes. Two of the studied organisations also explore instrumental activities such as a restaurant and bars and sale of animation shows to the private and public sectors.

Most activities are non-market in so far that the services are provided free or below market prices. It is in the case of instrumental activities that prices are similar or even above the market.

Most SEs rely strongly on public subsidies with a variety of sources and types of funding. This variation is related to the multiplication of intervention areas and projects (arts, education, social inclusion, etc.). The sources include national government, local government and European funding. Regarding the types of funding these vary from stable and medium-long term to punctual subsidies. In the case of culture and arts plurennial, medium-term subsidies are oriented to support the

structures (buildings, utilities, wages, etc.), and may be renewed upon submission of the strategic plan (subject to competition in the case of national government and to negotiation with local government). In the case of more established welfare organisations, SEs sign cooperation agreements with the government which fund certain services. These agreements have no term length and vary depending on the number of users or in the case of policy change. Within the framework of culture support, generally the government sets a few domains and objectives that organisations should comply with, although they are free to decide upon their activities. The leeway within cooperation agreements tends to be more reduced.

Punctual project funding is the second most important type of funding, particularly from public sources such as the EU and municipalities. They are directed to specific objectives and activities, usually focused on their publics and, therefore, not supporting the structure. For those organisations where culture and art are not the central mission, project funding support their arts and culture projects, meaning that they must be continuously competing for project funding to guarantee continuity. In the gaps of funding these organisations tend to have a strong enough structure to ensure the survival of the projects. Arts and culture organisations also find the support for their social and community intervention activities in project funding, although they have less capacity to ensure continuity when the funding ends.

Corporate or individual philanthropy in the form of prizes and donations are not significant in any of the studied cases (0–4%), particularly as none of the SE provides the type of activities which attracts cultural philanthropy.

A third source of income is members' payments. These may have several forms: sales to members, fees for services, members' capital, contributions and are particularly relevant in cooperatives. This may appear as the best-case scenario regarding the organisation autonomy but is not accessible to all publics.

The non-monetary resources are also very relevant. It includes work, in the form of volunteering and technical advice, buildings and utilities costs, usually from municipalities, food, clothes and other products from local citizens and businesses. In the case of culture and arts organisations volunteer work and technical advice are the most important sources.

5.3. Governance dimension

The European approach to SE governance pays attention to the multiplicity of social actors involved in control and decision-making processes alongside the democratic forms of participation in decision-making, classifying it as democratic governance (Pestoff and Hulgård 2016). The fact that the studied organisations are associations and cooperatives means that there are formal democratic mechanisms in place.

In all SE decision-making is based in the democratic principle of one person one vote with full members participating in the general assembly. However, one element of weakness is that in most organisations member participation is low, usually including only those more directly involved in the daily life. There are two associations, one arts organisation and one where arts is an important tool for social intervention, which stand out. Diverse members of the community are involved through participatory tools (participatory democracy meetings and participatory forum) which help to define their planning and activities.

The European approach also describes SEs as multi-stakeholder organisations, a way to ensure the participation of society (Low 2006) and the representation of diverse interests. Stakeholders are included in the property structure as members in the statutory governance bodies, or participants of other types of formal or informal decision bodies. A variety of stakeholders is also considered in decision-making and accountability.

In two cases workers and managers are the participants of the governing bodies while in the other there is a mix of users and workers. Only in one case citizens participate in the board and in another case volunteers participate side by side with workers. When there are formal and informal

participatory mechanisms there is a broader diversity of stakeholders (community members, citizens and experts, besides workers and users). Cooperatives tend to be more restricted in terms of participants in governance due to their mutual interest orientation. The prominence of workers in the boards are a sign of economic democracy but also of the pressure for professionalisation upon organisations.

6. Co-evolution between SEs and their institutional frameworks

The discourses on sector independency have been present since the non-profit sector was 'invented' (DiMaggio and Anheier 1990). Likewise, the discourse on arts and culture as an autonomous sphere has also been an important discourse to the field. However, as several researchers have shown, in culture and arts organisations there was never a single logic but, instead, different economies of worth (Abreu 2015; Dapporto and Sagot-Duvauroux 2000; Rousselière and Vézin 2009), institutional orders (Mauskapf, Ocasio, and Zajac 2011) or organisational goals (McQuilten et al. 2020) and systems (McQuilten 2017) which may be in tension. SEs, as hybrids, are said to take advantage of these tensions to generate innovation (Karré 2018). Tensions between the social and the artistic goals were, in fact, mentioned in the arts organisations and in the social organisations during the research. Both referred to the fact that their type of intervention in arts and culture is not seen as legitimate in the core of the artistic field. On other hand, artistic methodologies are seen with growing interest for social intervention as innovations.

Organisational trajectories and characteristics, conceived as contextually embedded, are shaped by institutional contexts and history, being the welfare state, its evolution and demise, a strong driver for SE (Kerlin 2017; Borzaga et al. 2020). This is visible in the case of SEs in Portugal. The Democratic Revolution marked a turning point in the role of non-profit organisations and their relationship with the state. Through citizens' mobilizations new organisations and services were created and, in some cases, acknowledged and incorporated into public policies. This varied according to different areas of the welfare state, with a difference between social services and culture in terms of sustained policies, earlier and more coherent and stable in the case of social services, latter and irregular in the case of culture (Garcia et al. 2016). In both cases, however, non-profits have been a significant pillar of public policies which, for the case or culture and the arts, have not been associated to a consistent policy allowing the stability of structures and the labour and welfare rights of workers.

Eloquent is the story of the studied arts organisation which was at the verge of closure in 2018 when, alongside many other artistic groups throughout the country, was not selected for the plurennial funding (2018–2021). This led to a significant mobilization of artistic structures, citizens and municipalities nationwide, ultimately forcing the government to reinforce the culture budget.

In any case, in all fields of responsibility of the state, an offloading of financial public responsibilities has been in place, whether justified in the context of budgetary crisis, the most recent one being in 2011–2015, or in the promotion of social entrepreneurship, social innovation and social investment for which a limited version of social enterprises as a shift towards market income have been mobilised. However, public policies do not have only a responsibility towards the creators, they also have responsibilities regarding citizen's access to culture and the many roles that culture play. Thus, government programs for culture have been included in governmental agencies strategies and funding and ultimately influencing organisations.

We acknowledge that public policy, national and European, has been a driving force for the trajectories of SE towards hybridisation between cultural and social missions and activities, as demonstrated in the case studies. New perspectives on culture are also pushing cultural and arts organisations to cross the borders of its realms. This is, for instance, present in the idea of cultural democracy, encapsulated in the claim for all to have access to culture based on a non-hierarchical

understanding of cultural practices sensitive to a plurality of cultural forms in contemporary societies (Lopes 2009; Bonet and Negrier 2018).

In all cases, however, we see that hybridisation is not only a result of public policies but, instead a mix of causes where we can include the search for sustainability through diversification of funding sources and innovations in SEs and their ecosystems in the way they conceive artistic practice or welfare interventions.

Thus, the relation between public policies and SE is not a one-way street, but a more complex process of co-evolution and mutual dependency, particularly where the agents share a stake in the general interest.

This is why we also studied SE participation in societal governance and found that most SEs studied seek to have some kind of political participation and influence. During the research we identified four different strategies.

The first one is through lobby for the promotion of certain agendas. Collective mobilisation is used as a strategy to improve political influence. In the study, we identified the participation of artistic and cultural workers in associative movements fighting for better culture policies and workers' rights, such as the labour union CENA-STE, the advocacy group 'Plateia', and social movements, such as '1% for culture', demanding a minimum of 1% allocation for culture in the government budget. This is less visible in welfare organisations, except for the case of one which mobilizes around ethnic minorities rights.

A second strategy is through demonstration of good practice, seeking their public and institutional recognition and, sometimes, incorporation it into public policy. By promoting innovative solutions, such as inclusion through the arts, SEs emerge as models of good practices. Their recognition, either by peers, audiences or institutions and policy makers, is the key to influence.

The third strategy is the influence of public opinion. Besides the participation in associative movements, there is an idea that there is always a political dimension to arts and cultural organisations. This role involves creating political awareness through art, the involvement of local communities and the contribution of art and culture to the promotion of debate in the public arena and the deepening of democracy, as well as the empowerment of their audiences for citizenship. In the case of welfare organisations, the influence of public opinion is often associated to the intention to change stereotypes regarding their publics with arts being an instrument for that.

Finally, co-production is more typical of welfare organisations, namely through being involved in local governance bodies which does not exist in the field of culture.

7. Conclusion

In this article, we focused on arts and culture SEs with social intervention and SEs that use arts and culture as methodologies as an alternative framework to the debates on artistic autonomy or the marketization of culture. Placed between the pressures of the state and of the market we consider that the concept of SE is a way of speaking about organisations, changes and challenges taking place in culture and the arts. We wanted to know what are SEs in arts and culture, how they emerge and are shaped and how they influence policy and society.

With distinct contextual contours, the role of the state and public institutions has become fundamental in supporting these organisations, guaranteeing that the cultural and artistic expressions they develop do not disappear and that the interests of the populations involved in their activities are ensured. Policies have many ways to influence organisations. Whether through direct regulations and support, through incentive to follow some activities, as in the criteria to access public funding, or in changing the environmental conditions of organisations and its publics. We see that in all cases organisations are not immune to these influences and, therefore, it is not surprising that their trajectories partially reflect – and indeed contribute to – changes in policy orientations.

The description of the types of trajectories in five different SE allows seeing that there is a mix of institutional entrepreneurship, public policies (and their lack) and societal trends influencing SEs

pathways towards hybridisation, whether they are arts organisations developing social interventions or social organisations with artistic and cultural methodologies or activities. Thus, although public policies are shaping organisations, these are also able to navigate the state apparatus and other opportunities to support their mission and vision.

The European concept of social enterprise, with its roots in the third sector or the social economy and its connection to social innovation, highlights the role of social mobilization in institutional innovation to address social and societal problems in partnership with public policies. It also sheds light on the economic, social and governance dimensions of organisations which we characterised to figure out what are arts and culture SEs in Portugal. We highlighted the variety of their missions and contribution to the general interest, the variety of their resources and their participatory features.

This study points to the importance of arts and culture SEs for emancipatory social change and the possibility for improvements in their institutional frameworks, particularly public policies. The last part of the paper highlights the participation of SEs in governance, showing that they are not only passive recipients of policy and social institutional influences but that they also influence institutions through different strategies.

This is an exploratory study with a small sample of organisations. It is the first one to focus SEs intervening in arts and culture in Portugal and is influenced by the studied cases. Therefore, we don't claim to have provided the full picture of the organisational transformations in arts and culture, the different forms of hybridisation between social, cultural, economic and political and the variety of action fields.

Notes

1. Organisations in the sub-sector of, culture, communication and recreation employ a mean of 0.4 paid workers, contrasted with 3,6 means of the whole of social economy organisations. (INE/CASES 2006).
2. 25.5% of self-employed workers in the social economy belong to this subsector. (INE/CASES 2006).

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