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EXPLORING THE STATISTICAL MEASUREMENT OF THE SOCIAL ECONOMY: FINDINGS FROM POLAND

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ABSTRACT: This article analyses the development of research on the social economy within the framework of official statistics. Using a single case study methodology, the factors influencing the development of research on the social economy were examined using Statistics Poland as an example. The study identifies three key factors: the dynamic and multifaceted nature of the social economy, internal factors related to the activity of public organisations, and external factors related to an institutional environment. The article emphasises the importance of statistical offices in this process and indicates that the launch and development of research within their structures depend both on the internal institutional processes to which they are subject as public institutions and on external pressure resulting from isomorphic processes. Despite the limitations imposed by the single-case methodology, the findings offer valuable insights for the conditioning of measurement of the social economy in national statistical offices.

KEYWORDS: social economy, measurement, Statistics Poland, official statistics, public administration, case study

Introduction

The social economy (SE) is becoming an increasingly significant factor in national and global politics due to its capacity to address societal needs and respond to emerging challenges (OECD, 2024). By prioritising social and ecological concerns over profit, SE facilitates sustainable development, reduces inequalities, and encourages inclusive growth (Chichevaliev & Ortakovski 2020, Hujo & Braumann, 2016; Littlewood & Holt, 2018).

SE measurement is instrumental in advancing this concept. Access to data on SE increases its visibility and recognition and allows for a more comprehensive illustration and understanding of this form of economic activity (Bouchard, 2023; Chaves-Avila, 2021).

Since the 1990s, there have been endeavours to develop methodologies for measuring and collecting data on the SE at national and international levels (Bouchard et al., 2019; ILO, 2023). Even with these endeavours, SE frequently remains unaccounted for in the national accounts of numerous countries. Moreover, the existing standards and methodologies often need to be revised to enable comparisons between the SE and the rest of the economy at the national level and for aggregating and comparing data at the international level (Bouchard, 2023). Furthermore, adapting traditional economic categories to new criteria established by law represents an additional challenge for statistical analysis. As Hiez (2023) observed, traditional statistics and public accounting are structurally incapable of accurately portraying the reality of the social and solidarity economy. The provision of consistent and comparable data represents a strategic challenge for the SE in Europe (Chaves & Monzón, 2011) and other parts of the world (Compère et al., 2021). In this context, improving the methodology for measuring SE is critical (Bouchard, 2023; Chaves & Demoustier, 2013; CIRIEC et al., 2015). The challenges and gaps identified above result in the current data on the SE being often scarce, incomplete, and difficult to compare (Bouchard, 2023).

This prompts the fundamental question of how a robust evidence base for the social economy can be developed by satisfactorily addressing the needs of stakeholder groups? To answer this question, it is necessary to analyse the situation from the perspective of the institutions responsible for providing data on SE. The generation of such data is the responsibility of a diverse range of institutions, including national statistical offices, government departments, and agencies, SE representative organisations (also known as umbrella organisations), universities, research centres, development agencies, and other non-state actors that promote the SE (Bouchard & Salathé-Beaulieu, 2021). Each provider has strengths and limitations (Bouchard & Salathé-Beaulieu, 2021). In particular, statistical registers offer reliable and widely accessible data. Public registers are often up-to-date, as they integrate multiple sources, provide comprehensive population coverage, allow for enterprise comparisons, adhere to stringent data cleaning and integration standards, and offer metadata (ILO, 2017).

This study focuses on the experience of Statistics Poland (Główny Urząd Statystyczny – GUS), as a public register of socio-economic data in Poland. The choice of Statistics Poland as the object of analysis is justified by both the importance of its output in social economy research and the limited international awareness of this output. International reports, including studies by M. Bouchard (2023), CIRIEC International (2017), and the International Labour Organisation (2023), point to the relevance of the Polish experience in this area. Notably, Poland is one of six European Union countries – alongside Belgium, France, Portugal, Spain, and Luxembourg – that maintain permanent social economy observatories and regularly update statistical data (EC, 2024). In recent years, Statistics Poland has developed systematic and comprehensive statistics on the social economy, providing internationally comparable data (OECD, 2024). Non-profit organisations have been included in public statistical surveys in Poland since 2009, with the scope of research gradually expanding to cover cooperatives and socio-professional reintegration units. Moreover, Statistics Poland implemented a dedicated survey on volunteer work, becoming the second statistical office in the world – and the first in the EU – to do so. Additionally, a social economy satellite account for Poland was introduced (GUS, 2021).

This paper aims to identify the main determinants of research development within public statistics on the social economy. Thus, this paper aims to identify what factors influence social economy research development in Poland's public statistics. It is based on a single case study on Statistics Poland's efforts from 1989 to 2024. The 1990s are regarded as a period of significant transition, marking the onset of political, economic, and social changes in Poland. Over the years, there has been

a notable surge in civic organisation activities, initially accompanied by a dearth of data on these entities (Leś, 2017).

This research uses an interpretive approach, employing qualitative methods and focusing on exploratory investigation. The results contribute to the systematisation of the factors influencing research within public statistics on SE. Several factors argue in favour of the article, including the growing importance of the social economy, the critical need for reliable data, the significant role of public institutions in data generation, the specific context of Poland, and the potential contribution to the academic literature and policy-making framework.

The paper is structured into three main sections. First, it reviews the existing academic literature on the social economy framework and statistics in the social economy. Second, it outlines the empirical research methodology, the findings, and the discussion. Finally, the limitations and future research directions are deliberated upon in the concluding section below.

An overview of the literature

Conceptual framework for the social economy

SE is a global phenomenon recognised under various names and definitions (OECD, 2023b). The bibliometric review by Macías Ruano et al. (2021) offers a comprehensive analysis of the topic, integrating various terms and perspectives related to SE. Broadly, the social economy is an umbrella term encompassing diverse concepts that prioritise social and environmental needs over profit and wealth generation, adhering to principles that diverge from those associated with capitalist and individualistic ideologies (Macías Ruano et al., 2021; Utting, 2023; Yi et al., 2023).

The term SE is interpreted as a constellation of diverse organisations united by a common attribute that distinguishes them from the traditional private and public sectors. Although the concept of the social economy is new, it encompasses a wide range of pre-existing organisations that have been regulated for a long time. The family of organisations recognised as SEs is large and includes cooperatives, mutual societies, associations, foundations, and other country-specific forms. The vast majority of SE definitions share the common characteristics of the entities included in this sector, namely, primacy of people over capital, democratic and/or participatory governance, management autonomy, reinvestment of profits for the benefit of their members or society as a whole. SE entities pursue primarily societal goals and maximise social impact (Defourny & Monzón, 1992; OECD, 2023). Social enterprises are also considered an integral part of the social economy (Borzaga et al. 2020). SE terminology and explanations can vary according to national traditions and cultural norms. However, the concept is widely recognised and understood globally and in society. Despite the evident differences, the solidarity economy is an economic vision that is predicated on solidarity, integration, and the social emancipation of individuals, organisations, and communities. It is a vision embodied by social economy entities, frequently the initiators and implementers of innovation (OECD, 2023ab, 2024).

Social economy measurement

Since the 1990s, a substantial body of research has been conducted to develop conceptual frameworks and map SE (Bouchard et al., 2019; ILO, 2023). Two conceptual frameworks have contributed to the development of work on statistics in SE: the non-profit organisations (NPO) approach and the social economy approach (Bouchard, 2023; Compère et al., 2021). The non-profit approach is found mainly in Anglo-American countries. NPOs are defined by five criteria: organised, private, self-governing, non-profit-distributing, and requiring voluntary participation. In contrast to other organisational forms, NPOs do not distribute profits and are not established to generate financial benefits (Salamon & Anheier, 1992; United Nations, 2003). Then, the social economy approach is present mainly in continental European and Latin American countries and is focused on democratic governance (Bouchard, 2023; Westlund, 2003).

Monzon and Chaves (2011) observed that the two approaches share several common characteristics. Some researchers posit that “social economy” is a more expansive concept than the non-profit sector (Laville et al., 2008; Utting, 2023). Others, such as CIRIEC, equate SE and non-profit sector

(Westlund, 2003), or combine them, treating each of the terms as equivalent (United Nations, 2018). The UN proposed the most recent approach in the 2018 Handbook, which provides methodological guidance for creating a satellite account for the third or social economy sector (TSE) in 2018 (United Nations, 2018). Accordingly, TSE consists of three components: 1) non-profit institutions not controlled by the government; 2) related institutions (cooperatives, mutual societies, social enterprises, non-stock or benefit corporations); 3) voluntary work (United Nations, 2018, p. 9-11).

Statistical practices for measuring the social economy involve using national statistics drawn from diverse data sources and methodologies, such as satellite accounts, surveys, and censuses, as well as international mapping efforts (Compère et al., 2021). The current discourse on the production of statistics for SE has revealed inconsistencies in the existing international statistical framework, thereby underscoring the necessity for harmonised statistics on the social economy sector (ILO, 2023).

A growing number of national governments around the world have incorporated the production of SE statistics into their policies, either as a means of a national SE development strategy or as a legal obligation resulting from legislation introduced on the subject (Bouchard & Chaves, 2022). The systematic measurement and collection of SE data is crucial for several reasons. First, research on SE helps policymakers to better understand the sector and to design and implement public policies more effectively. SE statistics make it easier to assess the size and impact of the sector, allowing for more effective development planning. They also help to monitor the development of SE and the effectiveness of support measures. Secondly, SE studies contribute to the integration of their role into broader public policies, such as resource redistribution, regional development, and environmental protection (Chaves-Avila, 2021). The inclusion of social economy data in official statistics has been shown to increase transparency, thereby fostering public trust in both the social sector and government institutions (Groshen, 2021). This increased transparency leads to greater citizen engagement and support for social economy initiatives. In addition, the collection of standardised social economy data facilitates international benchmarking, allowing countries to share best practices and learn from the experiences of other countries to support the development of the sector (World Economic Forum, 2022). Finally, the data can also be seen as a valuable resource for researchers and practitioners involved in analysing and mapping the sector, thereby contributing to a deeper understanding and development of the field.

Social economy measurement within public statistics in Poland

Social economy in Poland

The term social economy appeared and gained importance in Poland at the time of accession to the European Union in 2004, even though practices in this area were known earlier (Ciepielewska-Kowalik, 2020). It became the subject of interest of practitioners and theoreticians (more: Pacut, 2022) and public administration. Poland is counted, along with Bulgaria, Greece, Luxembourg, Romania and Slovakia, among the countries growing recognition thanks to concrete actions of politicians (EC, 2024).

In 2022, the Act on Social Economy in Poland was adopted (Act, 2022). Following the Act, the term 'social economy' encompasses the activities of social economy entities that are undertaken for the benefit of the local community. These activities primarily encompass the social and professional reintegration of individuals at risk of social exclusion, the creation of employment opportunities for such individuals, and the provision of social services. These activities are conducted in the form of economic activity, public benefit activity, and other forms as deemed appropriate by the relevant authorities. The social economy is defined as a sphere of civic activity that, through economic and public benefit activities, serves the subject. In this perspective, the social economy does not represent an alternative system, but rather alternative solutions. It is not an idea of rejecting the market and the state, but rather an element of systemic evolution. On one hand, it serves to solve social problems at the local level (neighbourhood economy, public utility services), while on the other hand, it acts as a mechanism for broader systemic changes related to the market economy and the state (co-management, public-social-private partnerships) (Giza-Poleszczuk & Hausner, 2008). Social economy entities comprise three distinct categories: cooperatives, social and professional reintegration units, non-

governmental organisations, and certain related institutions (Act, 2022). Each of these groups is regulated by a separate legal act.

In 2023, there were 106.2 thousand social economy organisations. They employed 210.9 thousand persons on the basis of an employment relationship, of whom 27.2 thousand belonged to groups at risk of social exclusion. Compared to the total number of persons employed in the national economy, 1.2% were employed in social economy organisations (GUS, 2024). The gross value added produced by the social economy stood at 1,94% when compared to the GDP (GUS, 2021).

Social economy in public statistics in Poland

The Polish public statistics were established in 1918 (Łukasiewicz, 2008), and their adaptation to the requirements of a market economy and democratic society followed the socio-political and economic transformation that took place in 1989. The basic legal instrument regulating national statistical research in Poland is the 1995 Act on Public Statistics (Act, 1995). This law was developed on the basis of the recommendations of international organisations (UN, ILO, Eurostat, OECD) and legal solutions applied in EU countries, and defines the scope, methodology, and timing of the surveys. In addition, an annual decree of the Council of Ministers regulates the public statistics research program in detail. Research in public statistics is financed from the state budget up to the amount set each year in the Budget Act.

Table 1. Development of research on social economy organisations in Polish official statistics

Organization/subject of the survey (year in which the survey was launched)	Scope of survey – selected issues	Methodology used	Results
Non-profit organizations: • associations and similar social organizations, foundations, faith based charities (2008) • business and professional organizations, employers' organizations (2010) • political parties (2012) • trade unions (2014)	Number and organizational structure of entities Scope of activities Membership and community engagement Paid employment Finance Management and information practices Collaboration with other organizations Determinants of public benefit status	(UN, 2003)	Regular reports published on the website since 2009 ¹
Socio-occupational reintegration units (2012): • social integration centers • social integration clubs • occupational therapy workshops • professional rehabilitation establishment	Number and structure of entities Number and structure of participants Costs, revenues Employment	-	Results published on the website with annual frequency from 2013
Cooperatives (2017): • Social cooperatives • Work cooperatives • Cooperatives of the disabled and the blind	Socio-economic potential of cooperatives	-	(GUS, 2019) (GUS, 2021)
Unpaid work outside the household (voluntary work) (2011)	Socio-demographic characteristics of volunteers Characteristics of voluntary work Economic dimension of volunteering	(ILO, 2011)	(GUS, 2012) (GUS, 2017) (GUS, 2023)
Social economy satellite account for Poland (2018)	Size and structure of the social economy sector Macroeconomic indicators and categories Labour resources Labour costs Sources of revenue	(UN, 2018)	(GUS, 2021)

The Polish statistical system is referred to in this piece of legislation as 'public statistics' in contrast to the terminology used under socialism ('state statistics') and the term 'official statistics' used in other countries (Walczak, 2008). As outlined in the relevant legislation (Act, 1995), public statistics in Poland are intended to provide systematic, reliable, and objective information to the public, the

¹ Statistics Poland: <https://stat.gov.pl/obszary-tematyczne/gospodarka-spoleczna-wolontariat/>

government, and businesses on key indicators, including the economic, demographic, social, and environmental situation. Statistics Poland and 16 provincial statistical offices and service units are responsible for the collection and dissemination of such data, with the aim of meeting the information needs of national and international data users (GUS, 2023).

The social economy has been included in public statistical surveys in Poland since the 1990s, initially focusing on non-profit organisations. The term ‘social economy’ appeared literally in 2009 in a research program on official statistics as one of more than 200 research topics approved for implementation in Poland in 2010 (Report, 2012; Appendix to the Regulation of the Council of Ministers, 2009). Since then, the term has functioned as a thematic area in Statistics Poland surveys, and research on this topic is carried out periodically. Over time, the scope of research expanded to include cooperatives, socio-professional reintegration units, voluntary work, and other entities (Table 1). Eventually, the survey encompassed all entities classified by law as part of the social economy sector in Poland, including social enterprises (Act, 2022).

Participation in these surveys is mandatory for respondents, and the studies are fully financed by the state budget.

Achievements to date in the field of social economy research in official statistics in Poland indicate: 1) implementation of a uniform research methodology, 2) systematic and comprehensive collection of data on the activities of economy entities: non-profit organizations, reintegration units, and cooperatives, voluntary work, 3) harmonization of research conducted in accordance with the United Nations guidelines and their alignment with national legislation, 4) administration of research (making the results public in the form of statistical tables and reports) (Pacut, 2024; GUS, 2019, 2021).

Research methods

This study examines the development of public statistics research on the social economy in Poland using a qualitative, exploratory case study approach within an interpretive framework (Yin, 2018). The research employed both primary and secondary data sources to comprehensively analyse the phenomenon (Table 2).

Primary data were collected through 13 in-depth interviews with nine key informants, including current and former staff responsible for social economy research at Statistics Poland². The interviews followed a purposeful and snowball sampling strategy (Patton, 2000) and were guided by a questionnaire featuring open-ended questions on five key topics: the history of social economy research, research processes in Poland, challenges and limitations in research development, and future plans.

The interviews, conducted between July and November 2024, lasted between 30 and 120 minutes each. They were recorded with the interviewees’ consent, transcribed verbatim, and supplemented with notes from one interview. Data collection continued until data saturation was achieved, meaning no significantly new information emerged (Glaser & Strauss, 1967).

Secondary data included legal acts, reports, and internal documents from Statistics Poland, along with materials from other institutions such as the Ministry of Family, Labour, and Social Policy, and EU project organisations. In total, 58 documents were analysed, with 32 selected for thematic analysis and coding.

The employment of a multi-source approach, also referred to as data triangulation, was intended to enhance the reliability of the results (Denzin, 1978). The utilisation of diverse data sources enabled the verification, supplementation, and embedding of respondents’ statements within a broader institutional context, thereby increasing the reliability and relevance of the analyses (Scott, 2014).

This multi-source approach enabled an in-depth exploration of the factors influencing the development of social economy research in Polish public statistics.

² Informants were labelled in the order of their first interview (Informants 1 to 9). Three respondents participated in multiple interviews to deepen the analysis and add to the data as the research progressed. Additional interviews were labelled with the respondent number followed by the interview sequence (e.g. 1.1 for the first additional interview with Informant 1).

Table 2. Data sources

Primary data	Secondary data
interviews with representatives of official statistics	- Legal acts - Documents, working papers, and reports relating to the operation of Statistics Poland and the Social Economy Research Centre - Official, internal documents and materials obtained from the office - Official website and social media by Statistics Poland - Thematic, recurrent reports, and methodological reports by Statistics Poland - Public presentations of Statistics Poland representatives at various conferences, meetings

Thematic analysis was conducted using MaxQDA software, adhering to Braun and Clarke's (2006) six-step framework and employing an inductive approach to develop a codebook (Saldaña, 2013). Triangulation of data sources enhanced reliability and credibility (Carter et al., 2014). The final stage integrated informants' feedback into the analysis, offering a nuanced understanding of factors influencing social economy research within Polish public statistics.

Findings

This article analyses the development of social economy research within public statistics in Poland. Based on the thematic analysis process, the archival documents and the interview data identified three themes within the qualitative data: the unit of analysis in social economy research, the organiser of the study, and the context of the study. The findings are discussed below, together with the relevant empirical evidence associated with each phase.

Unit of analysis in social economy research

The social economy is a multifaceted sector, encompassing entities ranging from traditional non-profit organisations to modern social enterprises, cooperatives, and voluntary associations. This diversity has presented significant challenges to statistical research. Since the 1990s, the scope of analysis within SE has expanded from focusing primarily on civic organisations to include socio-professional reintegration units and cooperatives. Informant 5 reflected on this evolution, noting, *"The hardest part of the research was finding and studying these entities. They are not like other entities, and it was difficult to get them to participate in the study."*

An important aspect of this research has been the adoption of international terminology and methodological standards, such as the United Nations' definition of non-profit organisations and the European Commission's guidelines on the social economy. These have allowed Polish statistics to integrate seamlessly with international frameworks, enhancing the credibility and comparability of the data. However, the sector's inherent complexity and the lack of familiarity among SE entities with statistical processes have often resulted in reluctance or distrust in reporting. Informant 5 noted, *"Respondents from the social economy sector tended to be unaware of the reporting obligation and afraid to provide information about themselves, especially about finances."* Addressing these trust issues has required innovative strategies to encourage participation and improve the reliability of data.

The organiser of the study

Surveys in the area of SE are planned and executed in accordance with the procedures, regulations, and standards in force at Statistics Poland. The initial research on the social economy began in the 1990s with an exploratory project focused on developing a methodology for studying non-profit organisations, including foundations, associations, and other social entities within public statistics. Pilot studies were conducted in 1998, 2002, and 2006 (Regulation of the Prime Minister, 2001; Regulation of the Council of Ministers, 1996). However, the results were not widely disseminated (Informant 1, 3, 4; GUS, 2019).

In 2009, the reform of Statistics Poland took place, which included the introduction of specialised statistical offices and electronic reporting. The Social Economy Research Centre (in Polish: Ośrodek

Badania Gospodarki Społecznej) was established within the Statistical Office in Kraków. It was designated as the national authority responsible for overseeing and managing social economy research on a nationwide scale. It has been responsible for conducting nationwide surveys on the social economy, including data collection, methodological development, survey coordination, and statistical analysis. Additionally, it collaborates with the scientific community, engages with national and international institutions, and promotes the significance of social economy statistics (GUS, 2025).

All informants saw the establishment of the Centre as a significant milestone in the development of social economy research in Statistics Poland. It not only raised the issue's profile within the office but also improved access to funding and infrastructure. The creation of the Centre enabled the establishment of a specialised team to monitor national and international trends, address emerging challenges and work with stakeholders. Over time, the team developed innovative projects with different partners. According to all informants, this specialisation ultimately contributed to improving the quality and development of social economy research.

"[...] establishing a dedicated unit within an office to address a specific issue enhances the topic's relevance. Furthermore, it develops its substantive capacity over time, uniting comprehensive knowledge and experienced specialists rather than disparate individuals". (Informant 4)

According to informants, the enactment of the 2009 Strategy on Third Sector and Social Capital Statistics was also important for the development of research dedicated to SE. On the one hand: *"The strategy was a response to the growing interest in civil society issues and the demand for results describing the socio-economic potential of social economy actors and for monitoring their role in the implementation of public policies and the provision of social services, as well as in the creation of social capital"* (Informant 2.2). On the other, it established the future direction of SE research, emphasising the necessity for new studies, comprehensive consultations, and pilot research on third-sector entities. A proposal was made to develop a satellite account for the nonprofit sector and transform it into a satellite account for the social economy. The strategy guaranteed the systematic and long-term implementation of SE research, as evidenced by respondents:

"The strategy allowed us to set the course of action. She was very forward-looking for that time" (Informant 2), and *"Cyclicity and durability are the essences of public statistics; the strategy guarantees this."* (Informant 3)

The centre has relied on Statistics Poland's extensive experience in socio-economic research for the duration of its activities. This has encompassed the utilisation of access to expertise, the application of procedures, and the assurance of the quality and reliability of the data obtained and published results. Concurrently, the centre has cultivated its expertise in the field, establishing a professional team and forging partnerships with the public sector.

"We were the ones who pointed out the areas worth exploring from our perspective. This was recognized and received interest from ministries and other institutions". (Informant 7)

Informants highlighted the use of new technologies in contacting respondents and capturing data. Advancements in technology have streamlined the research process. Early efforts relied heavily on paper-based surveys, which were labour-intensive and costly. The shift to online data collection reduced costs and improved efficiency and data quality. Informant 6 described the impact of digital transformation: *"Computerising research was a big change for us. Originally, we sent out 90,000 questionnaires by post. This was slow and costly. The use of the reporting portal has professionalized our work and ultimately improved the return of responses from respondents".*

All informants stressed that excessive bureaucracy, formalism, and procedures hindered the conduct and development of research. As a flagship example, they cited that it takes up to four years to get a new study off the ground and at least a year to publish the results.

In addition, financial constraints at Statistics Poland affected the scope and development of research in the SE area. According to respondents – optimising costs and looking for savings are the primary challenges of the office. This approach limits the planning and research ambitions of the team.

The context of the study

The implementation of SE research within public statistics in Poland was based on two premises: the internal one, concerning the provision of good-quality data on the social and economic potential of social organizations for the calculation of national accounts in Statistics Poland, and the external one, related to the provision of data for public decision-makers, non-profit organizations themselves, and other stakeholder groups (all informants; Act 1995). Statistics Poland noticed the information gap in this area. Concurrently, Polish researchers, in collaboration with Statistics Poland, identified data deficiencies and recognised the potential for advancement in this domain (Leś, 2017; Leś & Ołdak, 2006; Nałęcz, 2008).

The integration of Poland into the European Union has further accentuated information requirements concerning the operation of civil society organisations, social capital, and volunteering, necessitating the provision of reliable statistical data. The introduction of new legal regulations, Poland's accession to the European Union, and collaboration with various stakeholders have created a conducive environment for SE research. As Informant 1 noted, *"SE research has become an important policy and development need in Poland"*.

The enactment of the Law on Public Benefit Activity, Social Cooperatives, and Social Employment, among others, has led to an information requirement among decision-makers regarding the functioning of social economy organisations. Moreover, the integration of Poland into the European Union has necessitated the adaptation of national practices to European standards, particularly in the domains of public policy programming, social problem diagnosis, and the evaluation of intervention outcomes. Informant 1 noted the following: *"Poland's integration into the EU has revealed an even greater need for information on the functioning of civil society organizations and other related organizations – including the rationale and effects of this activity."* The programming of public policies in relation to EU standards entailed the need for reliable and credible data on civil society that could support the policy-making process and contribute to wider European objectives.

Furthermore, the informants indicated that the office's activities were firstly conditioned by the regulations, rules, and standards of research implementation in force at Statistics Poland, but also inspired by global arrangements regarding the methodology of third-sector research and academic debate on the subject. Participation in this discourse was direct for Statistics Poland as a partner organisation, a member of various committees and projects, or indirect through the involvement of researchers and external experts with whom it collaborated. Consequently, Statistics Poland experienced *"a constant flow of new, up-to-date knowledge on how to research and describe the third sector and used this knowledge to plan research in Poland"* (Informant 2.2). Significantly, collaboration with domestic and international stakeholders has further enriched the research process. Collaboration between Statistics Poland and academic institutions, non-governmental organisations, and international bodies such as the Johns Hopkins University and other statistics offices has fostered the development of unified systems for studying the third sector. This inclusive approach has enabled the addressing of diverse stakeholder needs and ensured the continued relevance and impact of SE research.

Discussion

The development of social SE research in public statistics in Poland has been shaped by three major influences: the unique characteristics of the SE domain, internal factors pertaining to the activities of the office conducting the study, and external factors concerning the institutional environment (Table 3). Each of these has contributed to the methodologies, challenges, and progress in the field over the past decades.

Table 3. Factors influencing the development of SE research in official statistics

Categories	Factors
Dynamic and multifaceted nature of the social economy	• Ambiguity of the concept • Multiple participants in the social economy • Rapid changes in the social economy • Complexity of the subject requiring expertise
Internal environment	• Legal procedures and regulations • Internal processes and organizational reforms • Long-term experience in socio-economic research • Access to advanced research infrastructure • Collaboration with stakeholders • Development of new technology • Public funding constraints
External environment	• Impact of European Union integration • Information gap and the need to fill it • Changes in legal regulations concerning the sphere of social economy • Participation in international and academic debates and projects on third sector research methodology • Collaboration with national and international stakeholders

The heterogeneity of the SE domain is an important factor influencing the conduct of research. It encompasses a diverse array of entities, including non-profit organisations, cooperatives, and reintegration units, each with its own unique legal framework (Pizarro Escribano & Miranda González, 2022). The term social economy is conceptually broad and evolves rapidly due to changing legal, organisational, and societal dynamics, which complicates the classification of SE entities and the development of appropriate research methodologies (Morris et al., 2021; Macías Ruano et al., 2021). This lack of clarity presents a significant challenge for researchers and public statisticians alike, impeding the accurate collection and analysis of data.

The development of social economy research was significantly influenced by internal factors inherent to the specific nature of Statistics Poland's activities as a public institution. Formal issues, the establishment of the Social Economy Research Centre in 2009 was recognised by all respondents as a milestone in the development of research activities. Formulating a research development strategy that took a long-term view of the subject and subject of the research, using the discourse on the subject at the time, was equally important. These two factors allowed the formal establishment of the topic of the social economy as an area of research within official statistics, which resulted in the inclusion of this topic in the public statistics research plan and the release of funding, allowing for cyclical research and its improvement. The extensive experience of Statistics Poland in conducting socio-economic research was instrumental in fostering the adoption of consistent procedures and standards, thereby ensuring the integrity and reliability of the data collection and analysis process. The collaboration with various stakeholders further enhanced the comprehension of the methodology, facilitating its refinement by international standards. Conversely, bureaucratic restrictions and formalism have hindered the organisation's capacity to respond flexibly to the demands of public decision-makers, including the updating and expansion of research and the expeditious publication of research outcomes. The office's work also exposes a dilemma: the optimisation of costs versus developing research domains. This dilemma also pertains to the subject under scrutiny – conducting and developing research within the social economy.

The external factors also play a significant role in the development of research on the social economy conducted by Statistics Poland. These factors defined the information needs and shaped the institutional and methodological conditions of this research. Firstly, alignment with international standards, especially in the context of Poland's membership in the European Union, enforced the harmonisation of research methods. This, in turn, increased the comparability of data and their usefulness for the programming of public policies. The growing demand for reliable data was driven mainly by legal regulations and the expectations of decision-makers. The information gap in the social economy, as identified by Statistics Poland in cooperation with researchers, necessitated systematic research. Such research can fill data gaps and enhance understanding of the dynamics of the third sector. The influence of global scientific and methodological debates, which furnish proven research instruments and inspiration for the implementation of new solutions, was also a significant factor. The collaboration of Statistics Poland with international organisations and academic institutions facilitated access to contemporary knowledge and the development of standardised social sector research systems. Consequently, Statistics Poland's research on the social economy became more comprehensive, reliable, and adapted to the real needs of stakeholders. This, in turn, contributed to better planning of public policies and to assessing the development of the social economy in Poland.

In analyzing the identified factors, it is important to note that two of them – namely, terminology and definitions of the social economy and external factors – have previously been recognized as significantly influencing research in the area of the social economy (Macías Ruano et al., 2021; Borzaga et al., 2020; Kerlin, 2017; Chandra & Kerlin, 2021). The findings of this study also confirm their importance. However, research on the social economy from the perspective of statistical offices as data providers has not yet been analysed in the literature, an oversight that is not easily explicable, given that statistical offices are an important source of data on the social economy and their activities have both strengths and weaknesses (ILO, 2017). The results of this study can be interpreted by focusing on this group of factors. Theories that explain the functioning of public sector institutions can thus provide insight into the research conducted by statistical offices.

The institutional theory provides a theoretical framework for interpreting changes in organisational behaviour. Following the work of DiMaggio and Powell (1983), who proposed the concept of institutional structures undergoing isomorphic changes in response to external pressures, changes in public statistics can be considered. The case of Statistics Poland can be interpreted through institutional change, in which the growing recognition of the social economy in national and European politics has caused an adjustment of the methodology within public statistics. The emergence of interest in the social economy in Poland coincided with Statistics Poland's adjustment of its operating principles to enhance efficiency and compliance with environmental requirements. The response of the office to national policy, European Union directives, and its involvement in international methodological discussions exemplifies a process of institutional convergence, wherein national statistical offices adapt their practices to global standards.

The results of this study can also be analysed in relation to the New Public Management (NPM) theory, which emphasises efficiency, accountability, and flexibility in public administration (Hood, 1991). Creating a specialised unit for the study of the social economy, the transition to digitalisation, and the implementation of electronic reporting mechanisms reflect the NPM approach, which aims to increase operational efficiency and reduce administrative burdens. Informants indicated that technological progress was a key factor in improving the collection and sharing of data, which is consistent with the NPM paradigm of using technology to optimise the public sector's operations. However, the key challenge identified in the study is the persistent bureaucratic inertia that limits the flexibility of research initiatives. The protracted approval procedures for new research and delays in the publication of results indicate a tension between traditional bureaucratic structures and the NPM's pursuit of innovation and flexibility. This dualism suggests that, despite modernisation efforts, deeply rooted bureaucratic norms continue to shape the pace and scope of research on the social economy in Poland.

By the principles of public value theory (Moore, 1995), public institutions are expected to generate value for society by aligning their operations with the needs and expectations of citizens and stakeholders. In social economy research, the function of Statistics Poland extends beyond the mere collection of data. The office is responsible for enhancing transparency, fostering credibility in the activities of SE entities through the provision of reliable information, and promoting evidence-based

policy. The study results demonstrate that cooperation with stakeholders was a pivotal factor in the research development. The integration of academic knowledge, the involvement of NGOs, and participation in international research initiatives have strengthened the methodological consistency of social economy statistics. However, challenges persist in building trust among social economy actors, especially regarding reporting obligations. The reluctance of some organisations to participate in surveys points to the need for more active stakeholder engagement and educational activities to strengthen the perceived legitimacy and usefulness of social economy statistics.

Conclusions

The paper contributes to the research literature on social economy measurement by providing a detailed analysis of a single case study, focusing on Statistics Poland's efforts. The article explores the development of SE research in Poland, focusing on the factors influencing this process within public statistics. Three categories of factors are identified as influencing SE research within public statistics: the unique characteristics of SE, internal factors related to official statistics, and external factors related to an institutional environment. The findings demonstrate that the initiation and execution of research in this specific field within the context of public statistics is a multifaceted process. It is influenced by interpreting the SE concept, the prevailing legislative and political conditions, and the acknowledgement of the existing information deficit in this area. Additionally, it is shaped by an understanding of the processes occurring within the domain of official statistics. The data collected on the Polish case demonstrates the significance of institutional adaptation, modernisation of the public sector, and cooperation with stakeholders as internal processes that also influence research in this area.

The Polish case study illustrates the difficulties encountered when attempting to harmonise national definitions with international recommendations, particularly given social economy entities' inherent heterogeneity and multidimensionality (Hota, 2023; Hota et al., 2020). The findings underscore the influence of external factors, such as policies and institutional environments, and internal organisational context, including Statistics Poland's structure and expertise, on the shape of research outcomes (Chandra & Kerlin, 2021; De Bruin & Lewis, 2015).

The study's contributions extend beyond the Polish context, offering insights applicable to other national statistics institutes seeking to develop social economy statistics. The research identifies key internal and external factors that influence the establishment and evolution of social economy measurement, such as legal frameworks, institutional adaptations, stakeholder collaboration, and methodological harmonisation with international standards. These findings highlight the role of institutional reforms and pressures, which are relevant to National Statistics Institutes in different countries facing similar challenges in integrating social economy data into their statistical frameworks. The study provides a model for how national statistics institutes can navigate conceptual ambiguities, adapt research methodologies, and institutionalise social economy statistics in response to policy and societal demands by analysing Statistics Poland's trajectory. The identification of bureaucratic constraints, financial limitations, and digitalisation processes further offers comparative lessons on how statistical institutions can enhance efficiency and data accessibility. Furthermore, the study emphasises the value of stakeholder engagement at both the national and international levels, demonstrating how collaborative approaches can facilitate methodological standardisation and enhance data reliability. These insights contribute to a more comprehensive understanding of the evolution of social economy measurement across different institutional contexts. They provide a foundation for comparative studies examining the development of statistical frameworks for the social economy by various national statistics institutes, their adaptation to external pressures, and their utilisation of international collaboration to enhance data comparability and policy relevance.

A primary research direction for the future is the analysis of the impact of digitalisation on the quality of social economy data. There is an increasing use of digital tools, such as administrative databases and big data, by statistical institutes, including Statistics Poland. However, further investigation is required into the actual effect of these tools on data accuracy and completeness. Additionally, the potential of artificial intelligence in identifying trends within the sector would be valuable. Another research area involves a long-term analysis of how social economy statistics are utilised in

public policy. Despite the systematic collection of these data, there is a paucity of knowledge regarding their actual influence on policymaking. Comparative studies could identify countries where such statistics are most effectively integrated into decision-making processes and which best practices could be adapted elsewhere. A third promising avenue of research is examining the collaboration between statistical offices and the social economy sector to improve data quality and completeness. Many social economy organisations are unaware of their reporting obligations or are hesitant to share information, limiting the reliability of available data. The identification of barriers to cooperation and the exploration of strategies to build trust, such as simplified reporting procedures or educational initiatives, are recommended as future research directions. International case studies could provide a valuable source of examples of effective practices that enhance engagement between social economy actors and statistical institutions.

This study's limitations include its single case focus on Statistics Poland, restricting generalizability, and reliance on a small sample size and qualitative data, which may introduce bias and limit robustness. Additionally, findings are constrained to developments up to 2024, leaving future trends unexplored.

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Agnieszka PACUT

STATYSTYCZNY POMIAR GOSPODARKI SPOŁECZNEJ. WNIOSKI Z POLSKI

STRESZCZENIE: Artykuł analizuje rozwój badań nad gospodarką społeczną w ramach statystyki publicznej. Wykorzystując metodologię pojedynczego studium przypadku, zbadano czynniki wpływające na rozwój badań nad gospodarką społeczną na przykładzie Głównego Urzędu Statystycznego w Polsce. W badaniu zidentyfikowano trzy kluczowe czynniki: dynamiczny i wieloaspektowy charakter gospodarki społecznej, czynniki wewnętrzne związane z funkcjonowaniem urzędu statystycznego oraz czynniki zewnętrzne związane z otoczeniem instytucjonalnym. W artykule podkreślono znaczenie urzędów statystycznych w tym procesie i wskazano, że inicjowanie i rozwój badań w ich strukturach zależy zarówno od wewnętrznych procesów instytucjonalnych, którym podlegają jako instytucje publiczne, jak i od zewnętrznej presji wynikającej z procesów izomorficznych. Badanie bazujące na pojedynczym przypadku ogranicza możliwość uogólnienia wyników, pomimo to dostarcza cennych spostrzeżeń na temat uwarunkowań pomiaru gospodarki społecznej w narodowych urzędach statystycznych.

SŁOWA KLUCZOWE: gospodarka społeczna, pomiar, administracja publiczna, Główny Urząd Statystyczny, statystyka publiczna, studium przypadku