

BOOK OF ABSTRACTS

ICA CCR Europe Research Conference 2026

Cooperative Enterprises for Shared Progress: Addressing Global Challenges Together



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1. Cooperative Governance and Management

Research streams: Cooperative Governance and Management

31 contributions

From Belonging to Action: Drivers of Cooperative Member Engagement

Gustavo Abib[a], Tomas Sparano Martins[b] and Marcos Wagner da Fonseca[c]

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Abstract

Background and Aim

Research on engagement in cooperatives is less developed than research on customer or employee engagement, even though member engagement is crucial for co-ops' sustainability and success. Because cooperatives are both associations of people and economic enterprises, member engagement goes beyond financial involvement to include psychological, social, and behavioral ties that bind members to the organization.

In the literature, engagement is defined as a positive state of active, energetic, and goal-directed involvement in a role, activity, or relationship (e.g., work, study, associative participation), involving cognitive, emotional, and behavioral investment. This state implies a meaningful connection with the target (e.g., organization, task, or group) and is often associated with dedication, vigor, absorption, and a sense of belonging. Across fields, scholars conceptualize engagement as a multifaceted construct that integrates affective (e.g., enthusiasm, interest), cognitive (e.g., attention, vigilance), and behavioral (e.g., active participation, extra effort) dimensions.

Simon (2015) presented a set of tools for measuring cooperative member engagement, but each had limitations. His main contribution was to highlight the multifaceted and complex nature of engagement in the cooperative context. The aim of this study is to review the literature on engagement and propose a framework for cooperative members to measure member engagement.

Methods

This article presents a literature review that systematizes the main discussions on cooperative member engagement. At the end of the review, we present our framework proposal.

Scientific articles and books in Portuguese and English were selected. Searches were conducted on Google Scholar using the following strings: "co-op member engagement"; "member engagement"; and "co-op engagement". A total of 106 articles/books were initially selected and analyzed (abstract reading). In the final stage, 29 articles/books were retained. Two researchers carried out this process.

Results and Discussion

Member participation should not be considered in isolation, but rather in close connection with governance and management (Simmons et al., 2007). However, the interrelationships between participation and governance, as well as between governance and management, are not always clearly delineated. To establish consistent connections among these domains, members' perceptions and interests must be accurately represented and properly articulated with the mechanisms that guide and direct organizational activities.

Based on the literature review, cooperative member engagement was synthesized into six pillars: belonging, relationship, governance, communication, principles, and effectiveness**.**

The first pillar reflects aspects of belonging. Studies on cooperatives show that a sense of belonging and identification with the cooperative strengthen members' willingness to participate in meetings, decision-making processes, and economic activities (Gertler, 2006).

The second pillar is the quality level of relationships. According to Hao et al. (2018), the quality of the relationship between members and the cooperative is one of the main antecedents of member engagement (active participation, commitment, and service use).

The third pillar refers to governance. Participation in governance is the practical manifestation of engagement. Barraud-Didier et al. (2012) explain that trust in the cooperative's decision-making bodies directly precedes participatory behavior. When members perceive that their voices meaningfully affect management, their engagement increases.

Communication is the next pillar. Previous studies in agricultural cooperatives have shown that strong communication among members and between members and the board of directors increases identification with the cooperative and affective commitment (Manousakis et al., 2021). This pillar includes how clear, transparent communication reduces information asymmetries between management and members, increasing trust, perceived control, and commitment to cooperative goals.

The fifth pillar is grounded in members' cognitive and normative internalization of cooperative principles. A robust understanding of core cooperative values, such as democratic governance, member economic participation, autonomy, and concern for the community, functions as a foundational mechanism through which members construct meaning around their role within the organization. This awareness strengthens identification with the cooperative and reinforces a shared sense of purpose. Such internalization fosters normative commitment, as members see cooperative principles as intrinsically aligned with their values and identity, rather than merely instrumental. Consequently, this dimension plays a critical role in deepening member engagement, moving it beyond transactional participation toward a more enduring, value-driven relational bond.

Finally, the sixth pillar refers to effectiveness. When the cooperative delivers outcomes perceived as positive (useful services, fair prices, economic returns), this strengthens satisfaction and commitment, while simultaneously reinforcing cooperative member engagement (Awoke, 2021).

Contributions and Implications

The main theoretical contributions of this article are:

(i) advancing the concept of engagement in cooperatives as a multidimensional phenomenon (behavioral, attitudinal, identity-based, and participatory);

(ii) integrating engagement with theories of governance and organizational commitment; and

(iii) helping to refine the typology of cooperative members (engaged, neutral, or passive members).

The study's main contribution is an integrative framework that links engagement levels to factors like performance, satisfaction, loyalty, service volume, meeting participation, and governance maturity. This linkage improves measurement accuracy and allows researchers to analyze engagement as a multidimensional driver of organizational outcomes.

From a managerial perspective, the model operates as a diagnostic and decision-support tool, functioning as an "engagement thermometer" that allows the identification of critical dimensions and the prioritization of targeted interventions. Moreover, it provides a structured basis for member segmentation and relationship management strategies, informing differentiated approaches to communication, cooperative education, service adoption, and the design of participatory governance mechanisms.

Keywords: co-op member; engagement, co-op management, commitment

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Redefining Human Capital Value: A Strategic Analysis within the Cooperative Context

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Abstract

In the contemporary business landscape, characterized by volatility and global competition, the survival of an enterprise no longer rests solely on its tangible assets or financial liquidity.

The prevailing trend in modern management emphasizes an imperative: the integration of organizational strategies with people management strategies (Eshete y Amentie, 2024). This alignment is not merely an administrative convenience; it is a fundamental shift that views human capital as the primary driver of sustainable competitive advantage.

Strategic Human Resources Management (SHRM) has emerged from this necessity. Unlike traditional personnel management, which was often reactive, SHRM posits that HR practices must be vertically aligned with the firm's strategic goals. When workers are managed as strategic partners, they are empowered to contribute their maximum potential, ensuring that the organization's vision is translated into daily operational excellence.

A pillar of SHRM over the past three decades is the concept of High-Performance Work Systems (HPWS). The core philosophy underlying HPWS is that HR practices should not be viewed as independent levers but as a cohesive "bundle." These practices—ranging from rigorous selection and comprehensive training to incentive-based compensation and information sharing—are interrelated and mutually reinforcing. This creates a synergistic effect: the impact of the system as a whole is significantly greater than the sum of its individual parts. Academic literature consistently highlights that firms implementing HPWS see improvements in productivity, innovation, and long-term viability.

To conceptualize how these high-performance systems actually translate into improved organizational outcomes, researchers frequently employ the AMO Theory (Appelbaum et al., 2000). This framework suggests that the effectiveness of HR practices is mediated by three critical dimensions of the workforce:

- Ability (A): Practices designed to ensure employees possess the necessary skills and competencies. This includes sophisticated recruitment processes and ongoing professional development.
- Motivation (M): Strategies that encourage employees to exert discretionary effort. This is achieved through both extrinsic rewards (performance-based pay) and intrinsic motivators (recognition and career progression).
- Opportunity (O): The structural design of the workplace that allows employees to voice their ideas, participate in decision-making, and take autonomy over their tasks.

While the link between the AMO framework and organizational performance is well-documented (Boselie et al., 2005)., the focus of recent scholarship has moved toward individual psychological indicators. It is now understood that organizational success is a byproduct of employee satisfaction and commitment. When the three pillars of AMO are strong, workers feel more valued and dedicated, which in turn fuels the performance engine of the company.

Despite the breadth of existing research, two significant gaps remain that this study aims to bridge.

The vast majority of SHRM studies have been conducted within traditional capitalist organizations. In these firms, there is a clear distinction between the providers of capital (owners) and the providers of labor (employees). However, cooperatives present a unique organizational architecture where workers hold a

dual role: they are simultaneously employees and owners of the firm. This democratic ownership model fundamentally alters the psychological contract. This study explores whether the traditional HR-performance link holds true in environments where social objectives often carry as much weight as financial ones.

A second oversight in current literature is the tendency to treat the workforce as a single, uniform entity. In reality, workers are divided into distinct professional groups with different daily experiences, expectations, and educational backgrounds: Blue-Collar Workers (BCW): Direct labor, often involved in manual or production-line task; White-Collar Workers (WCW): Indirect labor, typically performing administrative, technical, or managerial roles.

The perception of "Opportunity to participate" or the impact of "Motivation" strategies may vary significantly between a worker on the factory floor and an engineer in an office (Hu et al., 2010). By distinguishing between these groups, this study provides a more nuanced understanding of how HR practices resonate across different layers of the organization.

The primary objective of this research is to analyze the relationship between HPWS (operationalized through the AMO theory) and the satisfaction and commitment of both BCW and WCW.

The study is driven by two central Research Questions (RQ):

RQ1: Does the influence of human resource practices on employee satisfaction and commitment remain consistent within the unique environment of a cooperative?

RQ2: To what extent does the professional category (BCW vs. WCW) influence or moderate this relationship?

This study employs a robust quantitative methodology to test the proposed relationships. The research team designed a specific questionnaire tailored to integrate all relevant variables and items of interest within the cooperative context. Data collection was carried out throughout the year 2022 via a specialized online platform managed by an external firm. This entity was responsible for implementing the instrument and distributing it through a professional panel to workers within Social Economy organizations, with a particular emphasis on cooperatives.

By investigating these dynamics, this study contributes to a more inclusive theory of SHRM. It offers practical insights for cooperative leaders who must manage a diverse workforce that is both their labor force and their constituency. Ultimately, this research seeks to demonstrate that while the cooperative model is unique, its reliance on human capital remains the ultimate determinant of its success.

Keywords: AMO, blue collar worker, white collar worker, satisfaction, commitment

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Good Practices in Corporate Identity within Social Economy Organizations

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Abstract

To ensure effective management of corporate communication, it is essential to have a strategy that precisely defines the organization's identity and makes it understandable to both internal and external audiences. A well-constructed corporate identity makes it possible to clearly convey the organization's activity and the values that underpin it, thereby strengthening public perceptions of the project and its capacity to attract talent, investors, members, and customers.

Frameworks such as the Sustainable Development Goals (SDGs) and Corporate Social Responsibility (CSR) represent an opportunity for society to recognize and value the responsible practices of the companies whose products and services it consumes, in a world that is increasingly committed to ethical and responsible values. Social Economy organizations are, by their very structure, what other types of entities often need to demonstrate in some way: their values and principles offer a distinctive opportunity to show how their organizational purpose contributes to democracy and to community well-being.

The implementation of reference documents—such as sustainability reports—and the dissemination of social-impact results are recognized as value-added practices for organizations, as they provide a clear view of organizational commitment and help position these entities as reference models for new generations of social entrepreneurs.

This study aims to analyze how corporate identity is communicated by Spanish cooperative federations and how the relationship between corporate identity, sustainability, and social responsibility may influence stakeholders' perceptions and decision-making. Given that the social economy sector has been shown to make a significant contribution to sustainable development, particularly due to its close connection with and understanding of the communities and environments in which it operates, the study examines how cooperative principles are incorporated into institutional narratives and digital communication channels, with particular attention to the integration of the Sustainable Development Goals (SDGs) and Corporate Social Responsibility (CSR) commitments. It also seeks to explore the extent to which these organizations communicate their social purpose through information related to responsible management, transparency, sustainability initiatives, and social impact.

The research adopts a qualitative, exploratory approach combining a literature review with a content analysis of institutional communication. The literature review examines theoretical contributions concerning corporate identity, Sustainable Development Goals, stakeholder theory, and CSR. It also considers the role of the SDGs as a framework for articulating organizational commitments and communicating contributions to sustainable development. Furthermore, the review examines the argument that CSR-related actions can generate value for companies and potentially enhance financial performance. Regardless of the motivations underlying corporate engagement in CSR, CSR reporting can help stakeholders make more informed decisions by reducing information asymmetries and providing relevant information for assessing risk and long-term organizational performance.

In addition, a content analysis has been designed to organize the information and facilitate systematic comparison. The sample comprises the member federations of the *Confederación Empresarial Española de Economía Social (CEPES)*. Data collection is based on a set of variables related to corporate identity, social responsibility, and the Sustainable Development Goals (SDGs). The aim is to identify communication patterns, exemplary practices, and transferable elements that may serve as a reference for future projects and entrepreneurial initiatives within the cooperative sector.

At the current research stage, the expected outcome is a structured overview of how Spanish cooperative federations express their corporate identities and communicate their social and sustainability commitments through digital channels. The analysis is expected to identify common communication patterns, differences in the visibility of corporate social responsibility (CSR) and the SDGs, and areas for improvement in the communication of social and environmental commitments. Ultimately, the study aims to identify good practices and transferable strategies that can contribute to more consistent, transparent, and effective digital communication within the cooperative sector.

Corporate identity in the social economy is closely linked to the values of participation, solidarity, democracy, and social inclusion. These principles position cooperatives as key contributors to social responsibility and sustainable development. However, their commitment to these values should not only be reflected in their organizational practices but also be communicated effectively through their digital channels. Integrating CSR and the SDGs into corporate communication can help cooperatives make their social and environmental contributions more visible, strengthen transparency and accountability, and reinforce their distinctive identity. Tools such as ethical codes, sustainability reports, and social responsibility statements can support this process by providing clear and accessible information about organizational values, commitments, and impacts. In this regard, a strategic alignment between corporate identity and sustainability communication can strengthen stakeholder trust and help consolidate the social economy as a model of responsible and sustainable development.

This study contributes to the literature on corporate identity, sustainability communication, and the social economy by providing an exploratory analysis of how Spanish cooperative federations communicate their values, social purpose, and commitments to sustainable development through digital channels. By identifying communication patterns, strengths, and gaps in the integration of CSR and the SDGs, the research offers a framework for understanding how cooperative organizations can enhance the visibility of their social and environmental contributions. From a practical perspective, the findings may support cooperative federations and other social economy entities in designing more consistent and transparent communication strategies, strengthening stakeholder trust, legitimacy, and engagement. Furthermore, the study highlights the potential of strategic sustainability communication to reinforce the distinctive identity of cooperatives and to promote the social economy as a relevant actor in achieving the Sustainable Development Goals and fostering inclusive, community-based growth.

Keywords: Corporate identity, communication strategy, corporate communication

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Strategic Capacity and Consent in Cooperative Governance

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Abstract

Background

Cooperatives face a recurring governance problem: how can they preserve democratic legitimacy, member centrality, and stakeholder participation while also maintaining strategic clarity, decision capacity, and institutional resilience? This abstract addresses that problem from the perspective of cooperative law and governance design. Its point of departure is a broader doctoral research project on collaborative governance and legal design, but the analysis presented here is deliberately restricted to the cooperative form. The central question is whether cooperative law can incorporate selected governance mechanisms derived from sociocracy and related collaborative models without undermining core cooperative principles and cooperative identity (International Cooperative Alliance, 1995). The analysis therefore focuses on the relationship between participation and strategy, on the legal translation of sociocratic consent, and on the possibility of creating a more explicit strategic centre within a member-based cooperative governance structure (Iliopoulos & Cook, 1999).

Methods

The analysis combines cooperative-law reasoning with qualitative organizational analysis. The underlying observations derive from legal and organizational research and from qualitative interviews with organizations in Germany, Switzerland, and Spain, including Mondragón. Several of the organizations have also been known through long-term professional collaboration in legal and organizational consultancy. This combination permits a comparison between formal legal structures and governance practices developed in self-organized organizations. The purpose is not to import sociocracy, holacracy, or any other alternative governance system wholesale into cooperative law. Rather, the method is one of selective legal translation: governance practices are assessed according to whether they can be implemented through cooperative statutes, internal rules, organ structures, delegated arrangements, and decision-making procedures without weakening member rights or accountability (Teubner, 1983).

Results

The analysis identifies three closely connected results. First, it identifies a strategy problem of the cooperative. The claim is not that cooperatives fail because they are too democratic. The problem is that participatory structures may coexist with an insufficiently stabilized strategic centre, creating friction between operational breadth, participatory legitimacy, and long-term direction. A possible response is a top circle or equivalent coordinating body that strengthens strategic clarity while preserving the principle that those exercising leadership within the cooperative remain members and remain embedded in the cooperative's member-based governance.

The proposed top-circle model is therefore not conceived as a replacement for democratic control, but as an organizational mechanism for concentrating strategic coordination within the cooperative's existing legal and participatory framework, while establishing a clear distinction between strategic and operational governance and, at the same time, ensuring that both levels remain institutionally connected and mutually responsive (Beer, 1979).

Second, the analysis examines the translation of sociocratic consent into cooperative law. Consent is not treated as consensus, unanimity, or pure informality. It is understood as a decision mode in which a proposal can proceed unless a serious objection is raised (Endenburg, 1988; Rau & Koch-Gonzalez, 2018). In organizational practice, this allows differentiated stakeholder participation without automatically creating

veto governance. Translated into cooperative law, the mechanism may offer a way to structure participation among different stakeholder groups while preserving operability and comparatively low transaction costs. The legal question is therefore not whether cooperative decision-making should simply be replaced by sociocratic procedure, but where consent-based procedures can be anchored within the cooperative's legal architecture and how they can remain compatible with mandatory organ competences, member rights, and accountability.

Third, the analysis proposes a hybrid cooperative governance model. Its legal bindingness and normative hierarchy follow a sociocratic pattern: circles and top-circle functions can be anchored at statute level where appropriate, while delegated links, consent-based procedures, documentation, and review can be specified through internal governance rules. Procedural fine structure may selectively draw on holacratic practice where useful, particularly for role clarification, governance processes, and the processing of organizational tensions (Robertson, 2015). The cooperative, however, remains the focal legal form. The model therefore does not seek to establish an alternative constitution alongside cooperative law. It seeks to translate selected collaborative mechanisms into the cooperative form in a manner compatible with the cooperative's organ structure, member rights, democratic legitimacy, and accountability requirements.

Discussion

The discussion that follows from these results concerns the boundary between participation and strategic capacity. Sociocratic circle structures and consen**t** procedures are relevant because they make it possible to differentiate roles and stakeholder participation without equating participation with unanimity. At the same time, a cooperative that distributes participation widely may still require an identifiable place in which strategic perspectives are consolidated. The top-circle proposal addresses this tension by combining member-based leadership with a more explicit locus of strategic coordination. The hybrid model thus treats strategic capacity and democratic legitimacy not as opposing principles but as governance requirements that must be institutionally connected.

Contributions and Implications

The contribution of the analysis is a focused interdisciplinary translation from collaborative governance practice to cooperative legal form. It connects cooperative law, governance design, and qualitative organizational analysis around one question: how can cooperatives become strategically stronger without ceasing to be cooperatives? The practical implication is a framework for discussing whether specific sociocratic and holacratic mechanisms can strengthen strategy, participation, and institutional resilience while remaining subordinate to cooperative legal form and cooperative identity. The analysis is intended to stimulate discussion among cooperative-law scholars, governance researchers, and cooperative practitioners about the legal design of member-based self-organization.

Keywords: Cooperative law; cooperative governance; sociocracy; consent; strategy

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The economic weight of cooperatives in Europe: Institutional contexts versus industry conditions

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Abstract

Why does the cooperative organizational form attain greater economic weight in some territories and industries than in others? We compare an industry explanation grounded in transaction cost economics with a territorial explanation emphasizing institutions and historically accumulated cooperative capabilities. The former stresses competition between organizational forms and the comparative efficiency of cooperative ownership in governing transactions; the latter emphasizes institutions, traditions, and support networks sustaining cooperative development. We draw on an Orbis Europe dataset containing 154,730 cooperative entities and combine cooperative employment with Eurostat employment for 18,533 region–industry–year observations during 2014–2025. Cross-classified variance-components models distinguish general country, regional, and industry patterns from national and regional particularities within industries. For total cooperative employment weight, country × industry is the largest component, accounting for 29.7% of variation on the transformed scale, followed by region × industry at 23.2%, industry at 14.7%, and country at 12.2%. Country × industry is also most prominent for SME cooperative weight (33.5%), whereas region × industry dominates large cooperative weight (43.3%). The findings identify national industries as a priority level for investigating total and SME cooperative weight, and regional industries for large cooperative weight. Rather than identifying causal mechanisms, the analysis locates where transaction conditions and cooperative-supporting institutions warrant closer investigation.

Keywords: cooperatives; employment share; organizational scale; institutional embeddedness; cross-classified variance decomposition

Theme(s): Cooperative Governance and Management; Public Policy and Institutional Support for Cooperatives

From Agricultural Fragmentation to Collective Scale: Evidence from Italian Agricultural Cooperatives

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Abstract

European agriculture is characterized by a highly fragmented production structure, with many small and medium-sized farms operating across heterogeneous territorial and production contexts. Although farm structures differ considerably across regions and sectors, small-scale farming remains central to many European agricultural systems. Fragmentation may constrain farmers' bargaining power, increase transaction and marketing costs, and limit individual farms' capacity to invest in innovation, processing and market development. However, agricultural fragmentation should not be interpreted only as a problem of farm size. It also represents an organizational challenge concerning the capacity to coordinate dispersed production units and transform heterogeneous individual outputs into a stable and economically relevant supply. Agricultural cooperatives constitute one of the main organizational mechanisms through which this aggregation can take place. By pooling farmers' production and coordinating marketing, processing and commercialization, cooperatives can allow individual farms to overcome some limitations associated with small-scale production without requiring structural enlargement at farm level. From this perspective, the economic scale achieved by cooperatives represents an important dimension of their capacity to aggregate agricultural production. Yet cooperative systems are highly heterogeneous, and the presence of many cooperatives or cooperative members within a territory does not necessarily imply a correspondingly large economic scale.

This paper investigates the economic scale of agricultural cooperatives in Italy and examines the cooperative and territorial characteristics associated with their capacity to aggregate agricultural production. The Italian case provides a relevant setting because it combines a highly fragmented agricultural structure with a widespread but heterogeneous cooperative system. Descriptive evidence highlights substantial differences in cooperative economic scale across territories and production chains. In 2021, 5,854 agricultural cooperatives generated approximately €39.2 billion in turnover, €4.0 billion in value added and employed resources corresponding to approximately €30.5 billion in invested capital. However, economic activity was highly uneven. The North-East accounted for 21.4% of agricultural cooperatives but generated 57.5% of total turnover, with an average turnover of approximately €18 million per cooperative. By contrast, the South accounted for 31.3% of cooperatives but only 12.4% of total turnover, with an average turnover of approximately €2.7 million. Territorial differences are also evident in the contribution of agricultural cooperation to the agricultural and food system: in 2021, value added generated by agricultural cooperatives represented 16.9% of the value added of agriculture and the food industry nationally, compared with 30.9% in the North-East. These figures indicate that cooperative presence and cooperative economic scale are distinct dimensions of agricultural organization.

The research therefore asks why some cooperative systems are able to transform a fragmented agricultural base into substantially greater economic scale than others. Particular attention is devoted to the distinction between the extensive diffusion of cooperation and the intensity of the economic relationship between farms and cooperatives. The empirical analysis is based on an original integrated dataset combining financial and structural information on agricultural cooperatives from the AIDA-Bureau van Dijk database with farm-level information from the Italian Farm Accountancy Data Network (RICA). The longitudinal dataset covers 1,842 producer cooperatives observed between 2018 and 2023, corresponding to 10,572 cooperative-year observations across 21 territorial units. The dependent variable is the logarithm of

production value, used as a measure of cooperative economic scale and as a proxy for the economic scale achieved through the aggregation of agricultural production. Explanatory variables combine cooperative-specific financial and structural characteristics with indicators describing the agricultural system in which cooperatives operate.

Methods

Cooperative-level variables include financial structure, liquidity, the share of tangible fixed assets, age and production-chain specialization. Territorial variables capture the characteristics of the agricultural production structure and two distinct dimensions of cooperative integration. The first is the share of farms participating in cooperatives among all farms in the regional agricultural system. This indicator measures the territorial diffusion of cooperative participation and the breadth of the cooperative base. The second is the share of production value generated by cooperative-associated farms that is actually sold or delivered to cooperatives. This indicator captures the intensity of the commercial relationship between participating farms and cooperatives, and therefore the extent to which cooperative membership translates into actual aggregation and commercialization of production.

The empirical strategy combines descriptive analysis with a multilevel linear regression model in which cooperative-year observations constitute the first level and regions the second level. The multilevel approach accounts for the hierarchical structure of the data and distinguishes persistent heterogeneity between cooperatives from contextual differences between regional agricultural systems.

Results

The results confirm substantial heterogeneity in cooperative economic scale. The introduction of cooperative-level random effects produces a substantial improvement in model fit, indicating that persistent differences between individual cooperatives account for an important component of the variation in production value. In the final specification, the share of tangible fixed assets is positively associated with the logarithm of production value, suggesting that productive and infrastructural capacity is relevant to the development of larger cooperative organizations. Cooperative age is also positively associated with economic scale, while the current ratio is not statistically significant. The share of equity in total assets is negatively associated with production value, a result that should be interpreted in terms of differences in financial structure rather than as evidence that greater capitalization reduces cooperative development.

The two indicators of cooperative integration provide particularly relevant evidence for understanding the relationship between agricultural fragmentation and cooperative scale. The share of farms participating in cooperatives is positively associated with cooperative production value, suggesting that broader territorial diffusion of cooperative participation is related to the development of larger cooperative organizations. The share of production value actually sold or delivered by cooperative-associated farms to cooperatives is also positively associated with cooperative economic scale. This result is particularly relevant because formal membership does not necessarily imply that a large proportion of members' production is channelled through the cooperative. The positive association of both indicators suggests that cooperative economic scale is related both to the breadth of the cooperative base and to the intensity with which members' production is effectively integrated into cooperative commercialization channels. By contrast, the share of small farms in the regional agricultural system is not statistically significant. This finding suggests that agricultural fragmentation in itself does not sufficiently explain differences in cooperative economic scale. Rather, the organizational capacity to aggregate and channel dispersed production appears more closely related to cooperative development. Sectoral differences are also observed, particularly in the olive and cereal production chains, while broad geographical effects become less pronounced after accounting for cooperative-specific characteristics and regional agricultural structure.

Contributions and Implications

Overall, the evidence suggests that cooperative scale emerges from the interaction between internal organizational capabilities and the degree to which cooperatives are embedded in and effectively integrate the surrounding agricultural system. The contribution of the study is threefold. First, it shifts attention from cooperative participation and organizational performance toward economic scale as an observable dimension of production-aggregation capacity. Second, it distinguishes between the extensive diffusion of cooperation and the intensive economic integration of members' production, providing a more precise interpretation of how cooperatives transform fragmented agricultural production into collective scale. Third, it adopts a multilevel perspective that recognizes cooperatives as organizations embedded within heterogeneous territorial agricultural systems.

These findings have implications for cooperative development and agricultural policy. Strengthening cooperation should not focus exclusively on increasing the number of cooperative organizations or participating farms. Attention should also be given to the conditions that allow cooperatives to aggregate larger volumes of members' production, develop productive and commercial capacity, and strengthen the effective integration of farms into coordinated value chains. More broadly, the study suggests that the economic challenge posed by agricultural fragmentation is not necessarily to eliminate small-scale farming, but to develop organizational mechanisms capable of transforming dispersed production into collective economic scale. Agricultural cooperatives can perform this function, but their capacity to do so varies substantially across organizations, production chains and territorial systems.

Keywords: Agricultural cooperatives; Cooperative economic scale; Production aggregation; Cooperative integration; Agricultural fragmentation

Theme(s): Cooperative Governance and Management; Public Policy and Institutional Support for Cooperatives

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Community in search of practice – case study of a cooperative community of practice for climate action

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Abstract

Cooperatives are increasingly recognized as drivers of sustainable economies, owing not only to their democratic governance but also to the networks and federations that connect them (Novkovic 2022, UN 2024). Yet such democratic organizing might both improve deliberation, and slow-down action possibilities with increased costs for organizations. Drawing on a 16-month longitudinal case study of a climate-focused community of practice (Wenger et al. 2022) initiated by a cooperative federation, and using meeting observations, semi-structured interviews, and document analysis, we respond to this challenge exploring the question if communities of practice are a democratic innovation (Elstub et al. 2017) for climate action in cooperatives. We identify tensions between inclusion and diversity as an obstacle to efficiency, as well between climate change as an epistemic expert challenge and cooperative governance. We theorize these findings in terms of reciprocity dynamics built into democratic organizations, and how these reveal deeper, conflicting tendencies of interest for theory, practical design and the role of researchers.

Keywords: Community of practice; cooperatives; climate action; democratic innovation; climate expertise

Theme(s): Cooperative Governance and Management; Environmental and Social Sustainability in Cooperatives

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Organisational Mechanisms Shaping Member Engagement in Cooperatives: An Integrative Conceptual Synthesis

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Abstract

Background

Member engagement is central to the performance, democratic legitimacy, and long-term resilience of cooperatives and mutuals, which depend on the sustained contribution of their members as users, owners, and participants in a collective project. Yet across cooperative types and national contexts, declining engagement remains a persistent challenge, reflected in difficulties converting members into loyal users and active owners and in unequal involvement in decision-making (Fulton, 1999; Birchall & Simmons, 2004; Simmons & Birchall, 2022). A substantial body of research has identified factors associated with engagement—including trust, values congruence, social embeddedness, governance design, and economic value delivery—but two limitations constrain the development of actionable knowledge. First, the literature remains largely oriented toward member-level characteristics, such as motivations and values, rather than the organisational conditions that managers can deliberately influence. Second, it is predominantly correlational, identifying associations between predictors and engagement outcomes without specifying the processes through which organisational conditions translate into member behaviour (Hedström & Swedberg, 1998; Mahoney, 2001). As a result, existing work offers limited insight into how cooperatives can deliberately generate, sustain, and deepen engagement over time.

Aims

This article addresses these limitations by developing a process-based, mechanism-grounded conceptual framework of the member–cooperative relationship. Rather than treating engagement as a member disposition or cataloguing further predictors, it specifies the generative processes through which cooperatives produce engagement, thereby advancing a shift from variable-based to process-based theorising in cooperative engagement research and providing a basis for diagnosing engagement challenges and designing governance arrangements that sustain cooperation.

Methods

The study employs an integrative review methodology, which is specifically designed to reinterpret diverse and often disparate bodies of research within new explanatory frameworks and is therefore well suited to contexts of theoretical fragmentation, where merely aggregating findings would be insufficient (Torraco, 2005; Whittemore & Knafl, 2005; Snyder, 2019). The methodological rigour of such reviews resides in the transparency and consistency of the synthesis logic through which theoretical claims are derived from the corpus, rather than in the exhaustive evidence mapping that characterises systematic and scoping reviews. The corpus was assembled through structured searches in major academic databases, combining Boolean terms referring to the focal constructs and to cooperative organisational forms, conducted in English and French and complemented by backward citation tracking. Sources were retained when they explicitly addressed the member–cooperative relationship—whether through engagement outcomes, their attitudinal or organisational antecedents, or the cooperative practices through which they are produced—and were published in peer-reviewed outlets; studies focused solely on organisational performance or on non-member stakeholders were excluded. Both empirical and conceptual contributions were included, consistent with the dual aim of synthesis and framework development. The resulting corpus spans more

than five decades of research across agricultural, consumer, worker, and financial cooperatives, with agricultural forms most prominently represented.

Analysis followed the two-stage protocol typical of integrative reviews (Whittemore & Knafl, 2005). In the first stage, constructs describing the member–cooperative relationship were systematically coded across studies with respect to their definitions, measurement approaches, theoretical anchoring, and causal positioning, surfacing conceptual overlaps, inconsistencies, and fragmentation. In the second stage, organisational-level antecedents were isolated and iteratively grouped into coherent clusters on the basis of thematic proximity and functional similarity, yielding six recurrent clusters. These clusters were then translated into generative mechanisms following a mechanism-based explanatory logic (Hedström & Swedberg, 1998; Mahoney, 2001), in which a mechanism is a process whereby an organisational condition (A) produces a behavioural outcome (B) through an identifiable intermediate psychological state (C). Three principles, applied iteratively to the corpus, guided this translation: a process specification principle, distinguishing causal processes from thematic clusters; a distinctness principle, treating mechanisms as analytically separable when they operate through different intermediate states, produce different effects, or require different organisational investments; and a modulation principle, distinguishing mechanisms with direct behavioural effects from enabling conditions that shape members' receptivity to other processes. The mechanisms are organised within a three-layer architecture linking Layer 1 organisational conditions, Layer 2 intermediate psychological states, and Layer 3 engagement behaviours, rendering each component empirically observable and, in principle, testable.

Results

The synthesis identifies six organisational mechanisms: reciprocal exchange activation, whereby reliable economic value delivery activates and sustains a norm of reciprocity; institutional trust formation, whereby governance credibility builds trust in the cooperative as an institution; social embeddedness formation, whereby relational infrastructure deepens members' integration into networks of interpersonal ties; collective project internalisation, whereby consistent identity enactment leads members to internalise cooperative norms as their own; voice efficacy development, whereby genuine participation design cultivates the conviction that member involvement has a consequential impact on collective decisions; and cooperative literacy construction, whereby member education builds the cognitive and normative foundation that enables members to perceive, interpret, and respond to the conditions the other mechanisms enact. The first five are discrete mechanisms, each specified as a generative process linking Layer 1 organisational conditions to Layer 3 engagement behaviours through Layer 2 intermediate psychological states, while cooperative literacy construction operates as a higher-order meta-mechanism that amplifies the effectiveness of the other five rather than producing engagement directly. The framework further formalises two bidirectional reinforcing cycles—between institutional trust formation and voice efficacy development, and between collective project internalisation and voice efficacy development—alongside the complementary and conditional relationships among the remaining mechanisms, and specifies boundary conditions relating to cooperative type, size, lifecycle stage, and cultural context. Six propositions formalise these causal pathways.

Discussion

The framework thereby repositions engagement as an organisational achievement rather than a property of individual member dispositions: cooperatives do not simply find engaged members but build the conditions through which engagement is generated, maintained, and deepened over time. Commitment, participation, and loyalty are accordingly understood as differentiated attitudinal and behavioural expressions of the same underlying member–cooperative relationship, shaped by how organisational arrangements structure reciprocity, legitimacy, and opportunities for meaningful influence. This enables engagement patterns to be read as relational signals reflecting governance design and organisational credibility rather than as evidence of member apathy.

Contributions and Implications

The article makes three contributions. First, it consolidates prior, dispersed mechanism-like reasoning in the cooperative engagement literature into a unified explanatory architecture, resolving longstanding construct proliferation and classification inconsistencies. Second, it formalises the systemic nature of engagement, theorising the reinforcing dynamics and the meta-mechanism logic of cooperative literacy as structural properties of the engagement system rather than incidental findings, with the implication that governance reforms are most durable when they address reinforcing mechanism pairs simultaneously. Third, it provides diagnostic and design guidance enabling cooperative managers and governance practitioners to identify configurations of under-activated or misaligned mechanisms and to sequence investments in member relations accordingly.

Keywords: member engagement; organisational mechanisms; cooperative governance; integrative review; mechanism-based explanation

Theme(s): Cooperative Governance and Management; Measuring Impact and Performance of Cooperatives

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Twin Transition Technologies in Cooperatives: Organisational Configurations and Multi-Stakeholder Governance

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Abstract

Background

The ecological and digital transitions are changing how firms organise production, manage resources, interact with markets, and respond to social and environmental pressures. For cooperatives, these changes raise a specific organisational question. The adoption of new technologies depends on financial resources, skills, and market conditions, but it may also depend on how strategic decisions are organised and on which interests are represented in governance. This issue is particularly relevant for ecological technologies. Investments in renewable energy, energy efficiency, recycled materials, or cleaner production may generate benefits not only for the cooperative itself, but also for workers, consumers, and local communities. Broader participation in decision-making may therefore be associated with greater attention to these wider effects. At the same time, digital technologies often have a more direct connection with efficiency, administration, production control, and market access. The paper examines whether these differences are reflected in the technology profiles of cooperatives and, more specifically, whether cooperatives characterised by broader stakeholder involvement display distinctive patterns of ecological and digital technology adoption. The analysis contributes to a still limited literature that considers heterogeneity within the cooperative sector and connects governance practices with the two sides of the twin transition (Sacchetti & Tortia, 2016; Ribeiro-Navarrete et al., 2024; Coletti et al., 2024).

Aims

The objective is to identify recurrent organisational configurations among cooperatives and to compare their technology portfolios after the groups have been identified. Rather than estimating a marginal or causal effect of multi-stakeholder governance, the study asks whether governance openness forms part of broader organisational profiles that are systematically associated with different patterns of technological adoption. This distinction is important because cooperatives differ substantially in sector, age, size, market orientation, membership composition, sustainability, and digital capabilities. Cooperative status alone therefore provides limited information on how individual organisations respond to technological and environmental change (Bijman & Hanisch, 2020; Michaud & Audebrand, 2022).

Methods

The empirical analysis uses a cross-sectional survey conducted in 2024 on 61 agrifood and worker cooperatives located in Emilia-Romagna, Veneto, Friuli-Venezia Giulia, and Trentino-Alto Adige. The survey was based on a province-stratified sampling design and collected information on organisational structure, cooperative type, economic size, age, membership and board composition, market orientation, exports, commercial relations with other cooperatives, economic and financial sustainability, digital intensity, and stakeholder participation in strategic decision-making. Multi-stakeholder governance is measured in two ways. The first is a binary indicator identifying cooperatives in which at least two stakeholder groups beyond members are actively involved in defining strategic themes, priorities, or actions. The second is a count of the number of stakeholder groups involved at this level, capturing the breadth of governance openness. We calculate pairwise Gower dissimilarities on 15 mixed-type variables and apply agglomerative hierarchical clustering using Ward.D2 as a linkage criterion. The two governance variables are deliberately included together, giving the focal governance dimension two item-level contributions to the dissimilarity

function. Ecological and digital technology-uptake indicators are excluded from the clustering procedure and are compared only after cluster membership has been determined. Missing responses for technology-uptake items are coded as non-adoption, while planned adoption within the following two years is reported separately. The analysis is explicitly exploratory and descriptive; the resulting clusters should be interpreted as organisational configurations rather than as a causal classification.

Results

Three clusters are retained. The first consists of agricultural mono-stakeholder cooperatives: all observations are agricultural or agri-food cooperatives, none has multi-stakeholder governance, the mean stakeholder count is 0.50, and the organisations are relatively old and mainly locally or regionally oriented. The second, labelled young members cooperatives, consists entirely of worker cooperatives and is characterised by younger organisations, higher shares of young and women members, and greater exposure to international markets; almost half of these cooperatives nevertheless report multi-stakeholder governance. The third cluster consists of multi-stakeholder cooperatives. These are predominantly established agricultural and agri-food cooperatives, have the highest average stakeholder count and the largest mean economic size, and report a somewhat higher Digital Intensity Index than the other groups. The cluster selection is based on the dendrogram and the structure of the upper fusion heights, while the silhouette diagnostic is also reported. The two-cluster solution displays the highest average silhouette width, but it mainly separates young worker cooperatives from established agricultural cooperatives and would remove the governance-related differentiation within the agricultural branch. The three-cluster solution is therefore retained as a statistically plausible and substantively selected representation of the sample.

The clearest differences emerge for ecological transition technologies. Across the seven technologies retained for the cluster comparison, the multi-stakeholder cluster records the highest adoption rate for six and ties the agricultural mono-stakeholder cluster for biotechnologies. Its unweighted average adoption rate across these technologies is 41.7%, compared with 26.2% for agricultural mono-stakeholder cooperatives and 18.8% for young members cooperatives. The differences are especially visible for renewable energy, energy-saving technologies, the use of recycled materials, and clean production technologies. The digital profile is more mixed. The multi-stakeholder cluster has the highest unweighted mean across the ten displayed technologies, at 34.6%, compared with 27.8% for agricultural mono-stakeholder cooperatives and 18.9% for young members cooperatives, but it leads in only five technologies. Its stronger adoption is concentrated in big data and analytics, cybersecurity, the Internet of Things, digital software, and online platforms, while the agricultural mono-stakeholder cluster leads in artificial intelligence, robotics, blockchain, cloud computing, and edge computing. The results therefore do not support a uniform digital advantage for the most open governance profile. Instead, they point to a clearer association between broader governance and ecological technology adoption, alongside a more selective digital technology portfolio.

Discussion

These findings suggest that the two sides of the twin transition may respond to different organisational logics. Ecological investments can generate positive effects that extend beyond the cooperative, making the representation of workers, consumers, communities, and other stakeholders potentially relevant to strategic choices. Digital technologies, by contrast, are often more directly related to productivity, information processing, market access, and operational efficiency, so their adoption may depend more strongly on capabilities, skills, and competitive pressures. This interpretation is consistent with research linking cooperative innovation to coordination with members, suppliers, customers, universities, and institutions (Nazzaro et al., 2022), and with evidence that stakeholder pressure is associated with eco-innovation in cooperative enterprises (Carchano et al., 2024). It also complements recent work suggesting that digital and ecological technologies can be related but do not necessarily follow a common adoption path (Menéndez & Lavopa, 2025). The present design, however, cannot establish that multi-stakeholder

governance causes higher technology adoption because governance contributes directly to cluster construction and the profiles differ simultaneously in sector, age, size, market orientation, demographic composition, sustainability, and digital intensity.

Contributions and Implications

The paper contributes to the literature in two ways. First, it shows that important differences exist within the cooperative sector and that organisational heterogeneity should be examined alongside the cooperative/non-cooperative distinction. Second, it connects actual governance practices with the ecological and digital dimensions of the twin transition, showing that broader stakeholder participation is embedded in a configuration with a substantially stronger ecological technology profile but a more differentiated digital portfolio. For practitioners and policymakers, the findings indicate that support for the cooperative twin transition may need to account not only for financial and technological constraints but also for the organisational processes through which investment priorities are defined. Future research should use larger and longitudinal samples to test whether changes in governance precede changes in technology adoption and to identify more directly the mechanisms linking stakeholder participation, organisational capabilities, and technological choice. In this sense, the present analysis provides a descriptive starting point for more direct empirical tests of governance and technology adoption in cooperative enterprises.

Keywords: cooperatives; twin transition; multi-stakeholder governance; ecological transition; digitalisation

Theme(s): Cooperative Governance and Management; Environmental and Social Sustainability in Cooperatives

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New cooperative forms: evolution, governance and socio-ecological transition

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Abstract

In recent decades, new cooperative models have emerged in response to increasingly complex social and economic needs. These organizations – including social cooperatives, community cooperatives, and other multi-stakeholder cooperative forms – are characterized by the involvement of multiple categories of members and stakeholders in governance and decision-making processes, as well as by the pursuit of explicit social and community-oriented goals.

These developments challenge traditional views of cooperatives as single-stakeholder and primarily member-oriented organizations. By integrating different stakeholder groups and plural objectives, new cooperative forms have indeed developed governance structures and coordination mechanisms aimed at producing social value beyond the traditional mutual benefit of members.

This paper develops a conceptual and interpretative framework to analyse multi-stakeholder cooperatives as an evolution of the traditional cooperative enterprise model. Early cooperative initiatives were strongly rooted in a 'collective awareness' aimed at improving the well-being of communities (Defourny and Nyssens, 2017). The social role of cooperatives was therefore mainly linked to the promotion of the welfare and social emancipation of their members. Over time, cooperatives have become increasingly diversified depending on their geographical context and field of activity. In more developed market economies, cooperatives have in some cases weakened their social commitment and evolved into entrepreneurial forms that differ from investor-owned enterprises mainly in terms of ownership rights rather than social purpose. In other contexts, including several countries of the Global South, cooperatives have instead evolved into broader community-oriented enterprises. More recently, new cooperative forms have emerged to address new needs arising in local communities in both Northern and Global South countries. These initiatives have opened their membership and governance to the participation of different groups and stakeholders, in addition to and in collaboration with the founding members (Giovannini and Vieta, 2017; Tortia, 2026).

The paper asks whether and how multi-stakeholder governance represents a transformation of the traditional mutualistic model and how cooperatives manage the increasing organizational complexity resulting from the coexistence of multiple interests, motivations, and objectives.

The paper is based on a critical review and systematization of the existing literature on cooperatives, the theory of the firm, and transition studies. The analysis combines insights from the new institutional theory of the firm with broader perspectives from multilevel analyses in order to interpret the organizational evolution of cooperatives (Geels, 2026). Employing a multi-level framework, one of the central frameworks in transition studies, allows for a holistic and dynamic understanding of cooperatives as constantly evolving organizations.

The empirical part draws on an exploratory case study analysis focused on three selected cooperatives operating in three distinct Italian regions. The rationale for selecting Italy is that cooperatives in this country have undergone significant transformations that have led to the institutionalization of a cooperative form specifically aimed at pursuing the general interest: the social cooperative (Borzaga and Galera, 2016).

The rationale for selecting the three case studies is that they operate in economic sectors that are central to the sustainable socio-economic transition, such as food and reuse. Special attention is paid to how stakeholder participation in cooperative decision-making can both enhance economic democracy and contribute to improving the welfare of local communities.

The paper argues that multi-stakeholder governance does not represent a departure from the mutualistic nature of cooperatives, but rather its evolution and extension, resulting from the need to address multiple wicked problems, including demographic, social, and environmental challenges.

Keywords: Multi-stakeholder cooperatives; Cooperative governance; Mutuality; Social cooperatives; Sustainability transitions

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Organizational culture and knowledge-based agility in cooperatives: evidence from WCM 2025 organizations

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Abstract

Cooperative and mutual enterprises are increasingly required to respond to digital transformation, competitive turbulence and sustainability pressures while protecting their collective purpose and participatory forms of governance. Their capacity to adapt is therefore more than a question of operational speed: it involves recognizing emerging needs, mobilizing relationships and reconfiguring processes without compromising organizational identity or legitimacy. Organizational agility provides a useful lens for understanding this challenge, but most empirical research has concentrated on conventional firms and technology-intensive settings. Organizational culture may be especially consequential in the Social Economy because shared values, collective decision-making and multiple stakeholder interests shape how strategic information is interpreted and translated into action. The Competing Values Framework distinguishes four cultural profiles—clan, market, adhocracy and hierarchy—whose respective emphases on collaboration, competitiveness, experimentation and control suggest different implications for organizational responsiveness (Cameron & Quinn, 2011; Felipe et al., 2017; Monzón, 2025).

This study investigates how these four cultural profiles are associated with organizational agility among large cooperative and mutual enterprises. It asks whether cultures oriented towards participation, external results and experimentation are positively associated with agility, and whether a culture emphasizing formalization and procedural control is negatively associated with it. Organizational agility is conceptualized as a higher-order capability incorporating customer agility, partnering agility and operational agility, in line with the digital-options and information-technology literature (Sambamurthy et al., 2003; Lu & Ramamurthy, 2011). The analysis also considers the relevance of organizational knowledge processes as a theoretical context for agile adaptation, without treating knowledge management as an empirically measured construct (Rehman et al., 2025).

The empirical design relies on a cross-sectional, organisation-level survey of the Top 300 cooperative and mutual enterprises ranked by turnover in the World Cooperative Monitor 2025 (International Cooperative Alliance & EURICSE, 2025). Senior executives and managers with cross-functional knowledge were contacted through successive email invitations, reminders and targeted follow-up between December 2025 and February 2026. The final dataset comprises 132 usable questionnaires, representing a response rate of 44.0%. The questionnaire used five-point Likert items adapted from established instruments: 27 items capturing the four organizational culture profiles and 11 items capturing customer, partnering and operational agility. The hypotheses were examined through partial least squares structural equation modeling (PLS-SEM) in SmartPLS 4.1.1.8, using a two-stage approach for the higher-order agility construct and 10,000 bootstrap subsamples for structural inference. Age and gender were included as controls. Measurement quality, collinearity, common-method concerns, model fit and out-of-sample predictive relevance were also assessed in line with PLS-SEM guidance (Hair et al., 2022; Benitez et al., 2020).

The results support three of the four hypothesized relationships. Adhocracy culture exhibits the strongest positive association with organizational agility ($\beta = 0.424$, $p = 0.002$), highlighting the importance of experimentation, initiative and openness to change. Market culture is also positively associated with agility ($\beta = 0.240$, $p = 0.018$), consistent with the value of attentiveness to customers, competitive developments and external opportunities. Hierarchy culture shows a significant negative association ($\beta = -0.325$, $p = 0.002$), indicating that procedural rigidity and centralized control may constrain timely adaptation. By

contrast, the expected positive association between clan culture and agility is not statistically supported (β = 0.076, p = 0.300). Together with the control variables, the four cultural profiles account for 56.7% of the variance in organizational agility (R^2 = 0.567); neither control variable is statistically significant. Out-of-sample analysis yields positive Q^2predict values for all agility indicators and lower prediction errors than the linear-model benchmark, consistent with moderate predictive power. Most measurement checks are acceptable, although global model-fit indicators provide mixed evidence and warrant interpretative caution.

These findings indicate that the cultural foundations of agility are differentiated rather than uniformly beneficial. The relatively strong association for adhocracy is consistent with previous evidence that flexibility-oriented cultural environments favor organizational and project agility (Felipe et al., 2017; Rizi et al., 2025). The positive market-culture relationship suggests that a strong external orientation can complement, rather than necessarily undermine, the collective purposes of cooperative and mutual enterprises. The non-significant result for clan culture deserves particular attention: participation, trust and cohesion remain central to cooperative identity, but they may not, on their own, ensure rapid prioritization, decisions and execution in large organisations. Similarly, the negative hierarchy association should not be interpreted as an argument against accountability or coordination; rather, it points to the potential costs of excessive formalization when flexibility is required. Because the data are cross-sectional, these results describe statistical associations and do not establish causal effects.

The study contributes to Social Economy and organizational agility research in three ways. First, it tests the culture–agility relationship within prominent cooperatives and mutuals, where adaptation is conditioned by democratic governance, stakeholder plurality and collective purpose. Second, it offers a comparative assessment of all four Competing Values Framework profiles instead of treating supportive organizational culture as a single undifferentiated resource. Third, it connects discussions of innovation-relevant responsiveness with the organizational conditions in which knowledge may be interpreted and mobilized, while explicitly recognizing that these knowledge-related mechanisms were not directly tested. The findings therefore extend existing perspectives on agility without assuming that conclusions from investor-owned businesses transfer unchanged to cooperative settings.

For managers and governing bodies, the practical implications are to support bounded experimentation, strengthen routines for detecting stakeholder and market signals, and establish decision rules that convert collective deliberation into timely coordinated action. Streamlining unnecessary approvals may help preserve accountability while reducing obstacles to adaptive responses. The results do not support abandoning participatory practices; instead, they suggest combining cooperative values with external attentiveness, delegated authority where appropriate and operational flexibility. The study is limited by its single-informant, perceptual and cross-sectional design and its focus on large organisations. Future research could use longitudinal, multi-informant and comparative designs to examine smaller cooperatives, sectoral differences and the knowledge processes through which cultural orientations may translate into agility.

Keywords: Cooperatives; Organizational culture; Organizational agility; Social Economy; Competing Values Framework

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Governance and Values in Cooperatives: Effects on Member Satisfaction in Bulgaria

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Abstract

Background

Governance serves as the institutional mechanism through which cooperative values and principles are translated into organizational practice and member satisfaction. However, important research gap remains regarding the systematic evaluation of governance quality through an integrated framework based on cooperative values and principles. This study addresses that gap by developing and empirically applying a governance evaluation framework to examine the relationship between governance quality and member satisfaction across three historical governance period in Bulgarian cooperatives.

The Bulgarian cooperative movement provides a particularly appropriate empirical setting for addressing this research gap. Over more than a century, Bulgarian cooperatives have operated under three fundamentally different governance systems (pre-socialist, socialist and post-socialist) while preserving the cooperative organizational form. This historical development creates a unique opportunity enables a longitudinal assessment of how changes in governance quality influence the practical implementation of cooperative values and principles and, consequently, member satisfaction. Rather than treating Bulgaria solely as a national case, the study uses its historical development to generate conclusions with broader relevance for cooperative governance research.

Aims

The objective of the research is to evaluate the extent to which governance structures reflecting cooperative values and principles influence member satisfaction across the three historical periods of Bulgarian cooperatives. Unlike approaches focusing primarily on institutional or economic factors (Boevsky 2020; Boevsky & Laurinkari 2017; Georgiev & Ivanova 2024; Boevsky & Kramer, 1998; Hanisch & Boevsky, 1999), the study considers member satisfaction as an integrative outcome generated by the interaction between governance quality and the practical implementation of cooperative values and principles. This conceptual perspective follows the assumptions developed in previous studies on Bulgarian cooperative governance and organizational transformation (Boevsky & Sarov, 2017a; Boevsky & Sarov, 2017b).

Methods

Methodologically, the research adopts an interdisciplinary mixed-methods approach combining qualitative and quantitative techniques. The qualitative component comprises historical analysis, expert interviews, observations and analytical narratives, while the quantitative component applies the Analytic Hierarchy Process (AHP) developed by Saaty (1980). Because governance quality and member satisfaction cannot be measured directly through conventional quantitative indicators, AHP is employed to transform qualitative governance characteristics into measurable priorities through structured pairwise comparisons. Following the methodological framework presented in the study, seven core cooperative principles are operationalised as governance evaluation criteria: Democratic Management and Member Control, Voluntary and Open Membership, Member Economic Participation, Self-help and Solidarity, Proportional Remuneration, Non-interference from the State, and One Member–One Vote. Expert assessments are subsequently aggregated to compare governance quality across the three historical governance models.

Results

The empirical findings demonstrate substantial differences in governance quality across the three historical periods. Governance structures operating during the pre-socialist period exhibit the highest consistency with cooperative values and principles, whereas the socialist governance model demonstrates the weakest correspondence because centralized political control replaced member-oriented governance with state-directed administration. The post-socialist period occupies an intermediate position, reflecting the formal restoration of cooperative principles while revealing persistent shortcomings in their practical implementation. These findings indicate that governance quality depends not only on institutional design but also on the extent to which cooperative values and principles are genuinely embedded in organizational practice.

The quantitative evaluation further demonstrates that not all cooperative principles contribute equally to governance quality and member satisfaction. Democratic Management and Member Control received the highest weight (21.4%), followed by Self-help and Solidarity (16.0%). The remaining principles—Voluntary and Open Membership, Proportional Remuneration, One Member–One Vote, Non-interference from the State, and Member Economic Participation—received relatively balanced weights ranging between 10.5% and 14.5%, confirming that effective governance depends on the consistent implementation of the entire system of cooperative values and principles rather than on a single dominant principle.

Application of the AHP model ranked the three historical governance models according to their correspondence with cooperative values and principles. The pre-socialist period achieved the highest overall score (53%), followed by the post-socialist period (38%), while the socialist period accounted for only 9%. These findings confirm the central proposition that member satisfaction increases when governance structures closely correspond to cooperative values and principles, whereas deviations from these principles reduce member participation, organizational commitment and long-term sustainability.

To examine the robustness and temporal stability of the proposed framework, the empirical evaluation was replicated in 2025 using the same methodological approach as the original 2020 study. While the initial investigation was based on expert interviews with 11 specialists representing all regions of Bulgaria, the replication involved a different panel of 11 experts drawn from the same regional scope. The results confirmed the original ranking of the three historical governance models and consistently reproduced the predominance of Democratic Management and Member Control among the evaluated criteria. These findings provide additional evidence for the reliability and stability of the proposed framework and reinforce the identified relationship between governance quality, adherence to cooperative values and principles, and member satisfaction over time.

Contributions and Implications

The study contributes to cooperative governance research by demonstrating that governance quality depends less on the formal existence of governance structures than on the extent to which these structures consistently translate cooperative values and principles into organizational practice. Furthermore, it develops and empirically validates a governance evaluation framework that enables governance quality to be assessed systematically across different historical and institutional contexts. Although the empirical analysis focuses on Bulgaria, the proposed framework has broader applicability for comparative studies of cooperative governance and for evidence-based governance reforms in other cooperative systems. The findings also provide practical implications for cooperative managers and policy-makers by emphasizing that future governance reforms should strengthen democratic participation, transparency, accountability and active member involvement, while digital governance instruments may further reinforce these principles and support the long-term sustainability of cooperatives.

Keywords: Cooperative governance; Member satisfaction; Cooperative values and principles; Analytic Hierarchy Process (AHP); Governance evaluation framework

Theme(s): Cooperative Governance and Management

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Coop Link 360: A Framework for Democratic Digital Governance, Platform Sovereignty, and Networked Transformation in Cooperatives

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Abstract

Background

Digital transformation is reshaping how enterprises organise information, coordinate activities, govern relationships, and create value. For cooperatives, however, digital transformation cannot be understood merely as the adoption of new technologies or the improvement of operational efficiency. Cooperatives are member-owned and democratically governed enterprises whose digital futures must be shaped by cooperative principles such as democratic member control, autonomy, education, cooperation among cooperatives, and concern for community. The central argument of this study is that cooperative digital transformation should be understood as a question of democratic network governance: who owns the digital network, who controls the data, who participates in decision-making, and how the benefits of digitalisation are shared.

Aims

The main aim of the study is to develop a cooperative model of digital transformation that moves beyond technology adoption and places cooperative governance at the centre of digital network design. The study pursues four objectives. First, it examines how digital transformation is reshaping cooperative governance, member participation, board accountability, knowledge sharing, and cooperation among cooperatives. Second, it identifies the limitations of general network theory in explaining cooperative ownership, democratic control, and value-based digital governance. Third, it develops the Cooperative Digital Network Theory as a framework that embeds cooperative principles into the design, ownership, and governance of digital networks. Fourth, to operationalise the Cooperative Digital Network Theory through the Cooperative Digital Transformation Toolkit (CDTT) and to present Coop Link 360 as a prototype federated knowledge-sharing platform that enables cooperatives to exchange good practices, strengthen digital capacity, support governance learning, and build shared institutional resilience.

Methods

The study is based on a comparative and conceptual analysis of cooperative digital transformation, drawing on empirical insights from cooperatives in the United Kingdom, Japan, and India. These three contexts provide diverse examples of cooperative digitalisation across different institutional, cultural, and regulatory environments. The analysis examines how cooperatives use digital systems for communication, member engagement, service delivery, training, governance support, and inter-cooperative collaboration. Particular attention is given to the opportunities and risks created by digital platforms, especially in relation to data ownership, member agency, accountability, digital literacy, and dependence on external technological systems.

The analytical approach proceeds in three stages. First, the study examines the wider shift towards digitally networked organisations and recognises the relevance of Castells' Network Society Theory in explaining information flows, networked coordination, decentralised communication, and glocal connectivity. Second, it critically assesses these ideas from a cooperative perspective, arguing that digital networks are not neutral structures. Their democratic value depends on how they are owned, governed, accessed, and used.

Third, it develops the Cooperative Digital Network Theory as a framework for cooperative digital transformation.

Results

The Cooperative Digital Network Theory argues that digital networks in cooperatives should be designed around six interrelated principles. The first is economic democracy, which ensures that members are directly involved in shaping digital priorities, strategies, and decisions. The second is ethical data governance, which protects member privacy, promotes transparency, and resists the exploitation of cooperative data. The third is platform autonomy and resilience, which reduces dependence on corporate digital platforms and encourages member-owned or cooperative-controlled digital alternatives. The fourth is global-local, or glocal, network engagement, which enables cooperatives to collaborate globally while respecting local contexts, cultures, and community needs. The fifth is inclusive innovation and sustainability, which ensures that all members, regardless of technical ability, can participate meaningfully in digital transformation while aligning digital strategies with long-term environmental and social responsibility. The sixth is knowledge sharing and mutual learning, which promotes continuous member-led exchange of practices, enabling cooperatives to learn from one another and adapt through collective experience.

The study finds that digital transformation in cooperatives creates both opportunities and risks. Digital networks can improve communication, expand member participation, circulate knowledge, strengthen governance learning, and connect cooperatives across regions and sectors. However, if digital transformation is driven mainly by proprietary platforms, opaque algorithms, external vendors, or managerial priorities, it may weaken democratic accountability and increase technological dependency. The cooperative challenge is therefore not simply to become digital, but to become digital in a way that protects cooperative autonomy, strengthens collective capacity, and keeps members at the centre of digital decision-making.

To operationalise the Cooperative Digital Network Theory, the study introduces the Cooperative Digital Transformation Toolkit as a practical roadmap for value-based digital transformation. The toolkit supports cooperatives in assessing digital readiness, identifying governance gaps, strengthening member participation, improving digital literacy, aligning technology with cooperative values, and developing ethical data practices. It translates the theory into practical steps that can help cooperatives move from passive digital adoption to active digital self-governance.

Contributions and Implications

The practical contribution of the study is the development of Coop Link 360 as a prototype cooperative digital network. Coop Link 360 is conceptualised as a cooperative knowledge-sharing and capacity-building platform that connects primary cooperatives, federations, cooperative leaders, managers, educators, researchers, and policymakers. The prototype is designed to include digital readiness tools, governance playbooks, training resources, sustainability practices, ethical data guidelines, case studies, peer-learning spaces, and inter-cooperative collaboration mechanisms. Unlike centralised corporate platforms, Coop Link 360 is presented as a democratic cooperative digital ecosystem that supports shared ownership of knowledge, collective problem-solving, digital inclusion, and cooperation among cooperatives.

The study contributes to theory, practice, and cooperative strategy. Theoretically, it develops the Cooperative Digital Network Theory as an extension of network society analysis, placing economic democracy, ethical data governance, platform autonomy, glocal engagement, inclusive innovation, sustainability, and mutual learning at the centre of cooperative digital transformation. Practically, it presents the Cooperative Digital Transformation Toolkit and Coop Link 360 prototype as mechanisms for cooperative knowledge exchange, digital capacity-building, governance learning, and shared innovation. Strategically, it shows that cooperatives can respond to the global concentration of digital power by building their own democratic digital networks. This directly connects with the conference theme, “Cooperative Enterprises for Shared Progress: Addressing Global Challenges Together,” by showing how

cooperatives can address platform dependency, digital inequality, data extraction, and fragmented knowledge systems through cooperative-controlled digital infrastructures.

Conclusions

The study concludes that cooperative digital transformation must be shaped by cooperative values rather than by technology alone. Cooperatives can advance shared progress in the digital age only when they actively govern digital networks as democratic, ethical, inclusive, and member-centred spaces. Coop Link 360 offers one practical pathway for doing so. As a prototype cooperative digital network, it connects cooperatives, circulates knowledge, strengthens digital capacity, supports governance learning, and enables cooperation among cooperatives across regions and sectors. The wider significance of the study is that it demonstrates how cooperatives can move from technology adoption to democratic digital self-governance, thereby creating a more cooperative, resilient, and socially responsible digital future.

Keywords: Coop Link 360; Cooperative Digital Transformation; Cooperative Digital Governance; Cooperative Digital Transformation Toolkit; Cooperative Digital Transformation Theory

Theme(s): Cooperative Governance and Management; Technology, Digitalization, and Platform Cooperatives

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What Really Motivates Collective Action? The Phase 0 Framework of Mobilization Readiness

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Abstract

Background

Why do some people confronting common adverse conditions become willing to organize, while others adapt privately, wait, exit, or remain silent? Common adverse conditions are circumstances that harm, or plausibly threaten, multiple actors whose outcomes are linked. Their effects need not be equal, and those affected need not initially share an interpretation. Market failure is one possible source, particularly for economic actors like agricultural producers, but the framework also encompasses environmental risks, threatened rights, and institutional exclusion. Olson (1965) explains why common interests do not automatically produce collective action: individuals may benefit without contributing. Ostrom (1990) shows how institutional arrangements can support cooperation. Neither common exposure nor general support for cooperation establishes willingness to begin organizing. The distinction between common exposure and a shared interpretation is central: people can experience related difficulties without recognizing one another as potential collaborators. The paper therefore distinguishes experiencing a problem, favoring a collective response, becoming willing to bear initial organizing costs, and taking an observable first action.

Aims

This paper develops Phase 0 as a bounded framework of mobilization readiness. Adapted from Cook's (2018) cooperative lifecycle, it examines the motivational transition analytically prior to the economic-justification work of Phase 1. Its central question is how individual interpretations of adversity become a mutually recognized orientation toward collective response. The phase 0 framework presents five connected steps culminating in mobilization readiness, defined as willingness to incur a nontrivial initial cost to help begin a joint response. The immediate outcome is not cooperative registration, organizational design, or long-term performance, but the emergence of willingness to begin organizing. It is applicable to cooperative development without claiming to explain every cooperative's formation or every form of collective action.

Methods

The study uses conceptual theory development through an interdisciplinary synthesis and comparison of published theoretical and empirical scholarship. It does not report newly collected survey, interview, experimental, or archival evidence. The analysis compares existing explanations by their mechanisms, levels of analysis, temporal assumptions, and immediate outcomes. It then organizes these insights into a process framework and derives propositions, boundary conditions, and an agenda for empirical assessment.

The principal foundations include Olson's contribution problem, Ostrom's institutional analysis, mobilization sequences separating motivation from recruitment and barriers (Klandermans & Oegema, 1987), and collective-action framing (Benford & Snow, 2000). Social-psychological foundations include the Social Identity Model of Collective Action (SIMCA) and the related EMSICA model, which connect injustice, identity, and efficacy, and syntheses incorporating morality and structural constraints (van Zomeren et al., 2008; Thomas et al., 2012; Agostini & van Zomeren, 2021). Work on collective intentionality, political opportunity, power, and participation thresholds informs the account of shared orientation and constrained action.

Results

The conceptual analysis organizes the path to mobilization readiness into five connected steps. The first establishes the starting context; the remaining steps describe the core Phase 0 process. These are analytical steps one could go through, not rigid stages: appraisals and relationships can develop together, stall, or change.

Step 1: Common adverse conditions, institutions, and power. Actors encounter circumstances affecting their livelihoods, opportunities, rights, or valued communities. Institutions and power shape both exposure and available responses. Among agricultural producers, unequal bargaining relationships or limited market access may create common difficulties without yet producing agreement about their causes or remedies.

Step 2: Individual appraisals of unfairness and consequential threat. Actors assess whether a condition violates legitimate expectations and whether inaction places something valued at meaningful risk. Unfairness concerns distribution, procedure, recognition, reciprocity, dignity, or rights; consequential threat concerns anticipated harm. A farmer may consider unfavorable treatment unfair and also anticipate losing a viable livelihood, but these judgments need not coincide. Threat is not equivalent to fear and does not automatically generate willingness to organize.

Step 3: Collective addressability and efficacy. Actors consider whether joint action is an appropriate response and whether relevant participants can carry it out (Bandura, 2000). Addressability and efficacy are complementary judgments within the same step, not disconnected mechanisms. For illustration, farmers may consider a marketing cooperative an appropriate response to weak bargaining power while doubting their ability to recruit members or coordinate sales. Conversely, a capable group of farmers may regard an individual member's unrelated household debt as outside the proposed cooperative's purpose. These hypothetical examples show why identifying an appropriate joint response and assessing the capacity to pursue it must be considered together.

Step 4: Relational alignment. Conversation, comparison, framing, identity, and networks allow people to discover how others interpret the condition. Alignment involves increasing convergence and mutual awareness, not complete agreement. Farmers who privately object to trading conditions may begin to recognize a common concern through discussion, while still disagreeing about leadership or remedies. Similar individual beliefs alone do not establish a collective orientation: participants must recognize that relevant others share those beliefs. Visible commitments can also alter expectations about participation (Granovetter, 1978).

Step 5: Mobilization readiness. Actors become willing to bear an initial cost involving time, resources, information, reputation, or risk. Examples include willingness to attend an exploratory meeting, contact other producers, or pledge an initial contribution. Collective readiness requires multiple willing actors, mutual awareness, and credible expectations that an initial act can be undertaken together. It cannot be inferred from average appraisal scores alone. Readiness may depend on sufficient participation, credible leadership, or protection from retaliation. The subsequent initial mobilizing act is an observable outcome, not an additional step within Phase 0.

Five propositions specify testable expectations. First, unfairness appraisal should predict readiness among similarly exposed actors, net of expected private material returns. Second, threat should strengthen readiness as addressability and efficacy increase; when either is very low, it may instead encourage withdrawal or private coping. Third, the configuration of unfairness, consequential threat, and addressability should explain readiness beyond their additive effects and established measures of identity, efficacy, and expected returns. Fourth, convergence and mutual awareness should strengthen collective readiness beyond mean appraisal scores, while visible commitments should help translate comparable readiness into an initial act. Fifth, scarcity, dependence, repression, and blocked opportunity should weaken the readiness–action relationship without necessarily eliminating readiness. These are theoretical predictions, not reported empirical results.

Discussion

Phase 0 builds on existing accounts of grievance formation, framing, and mobilization. Its proposed contribution is to connect individual appraisals, the joint assessment of addressability and efficacy, and relational alignment to a specific cost-bearing outcome. It is a process framework, not a single trait measured by averaging its components. The framework concerns voluntary, costly, uncertain, emerging responses to adversity. Unfairness and threat are not universal prerequisites: solidarity can arise without personal threat, and responses to natural hazards without perceived injustice.

Empirical assessment remains future work. Longitudinal studies should establish whether appraisals and alignment precede readiness. Comparative cases, including failed starts, should examine why similarly exposed populations differ. Experiments and multilevel network designs should test combined appraisal effects, mutual awareness, and constraints on action. Measurement should examine how judgments about response appropriateness and group capability interact, without assuming they must develop independently. Researchers should also distinguish willingness to incur a specified cost from general approval of cooperation. Readiness and constraints must be measured independently rather than inferred from inactivity. Evidence that readiness consistently precedes the proposed appraisals would challenge the temporal account. Evidence that their configuration and relational alignment add nothing beyond established models would weaken the claim of additional explanatory value.

Contributions and Implications

For cooperative scholarship, Phase 0 connects the emergence of willingness to organize with the subsequent work of economic justification. It distinguishes producers who reject a collective response, those who consider it appropriate but doubt their capability, and those who are willing yet constrained. Cooperative-development research can therefore examine motivational formation alongside feasibility and barriers to participation, without treating market failure as sufficient for organization. An economically feasible proposal may still attract little readiness, while willing producers may lack resources or safe opportunities to communicate. These situations require different diagnoses. Neither implies that motivation can substitute for economic feasibility or that a feasibility study alone establishes collective commitment. This is the first conceptual paper in a planned series on premobilization for cooperative establishment or collective action. Subsequent papers will examine how readiness connects to the practical economic-justification work of Cook's Phase 1. The present contribution is a bounded, testable account of how "my problem" may become "our problem," and how that recognition may become willingness to initiate a collective response.

Keywords: Collective action; mobilization readiness; perceived unfairness; collective addressability; Phase 0

Theme(s): Cooperative Governance and Management; Emerging Sectors and New Themes

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Feminist Management Practices in Cooperative Organizations: Re-politicising Democracy, Care and Power in the Social and Solidarity Economy

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Abstract

Background

Recent debates in feminist economics, feminist organisation studies and Social and Solidarity Economy (SSE) have questioned the capacity of conventional managerial models to address structural inequalities related to gender, class, race and coloniality (Acker, 2006, 2012; Calás et al., 2014; Clark-Saboda & Lemke, 2023; Rius, 2017; Arando Lasagabaster et al., 2024; Bouchard et al., 2025; Jaumier, 2025). These perspectives challenge dominant assumptions about neutrality, efficiency, value and management by showing how power relations, care and reproductive tasks shape organisational life. At the crossroads between SSE and feminist literature, recent studies also highlight the paradox between the values displayed by some SSE organisations and their actual practices, inviting researchers and practitioners to rely on care ethics and *management caring* to realign external aims with internal functioning (Reichhart, 2023; Arnaud-Clémens & Lanciano, 2026). Within this landscape, feminist cooperatives, understood as organisations that claim a feminist identity and seek to integrate feminist values into their internal functioning, remain underexplored in academic management research. Existing studies on gender and cooperatives tend to focus on women's participation or equality in the SSE, while less attention has been paid to the everyday management practices through which feminist principles are translated into cooperative organising (Arando et al., 2025; Bastida et al., 2025).

Aims

The general objective of this research is to analyse how feminist political commitments are translated into management practices in feminist cooperatives in Spain and France. More specifically, the study explores how feminist values influence cooperative governance, work organisation and leadership, how they move from political discourse to organisational practice, and what kinds of tensions emerge in this process.

Methods

The research follows a qualitative and interpretive design grounded in feminist research principles. Although the study includes eight organisations located in Spain and France, five in Spain and three in France, it does not seek to conduct a formal comparative analysis. Instead, it examines two neighbouring territories that share broadly similar SSE dynamics and that the authors know well through previous professional and personal engagement. The sample brings together small and medium-sized cooperatives from diverse fields, including social research and intervention, feminist urban planning, agroecology, organisational facilitation, funeral services, bicycle repair and autonomous entrepreneurship support. The aim is to shed light on revelatory cases (Yin, 2003) that may inspire other organisations and contribute to collective reflection on feminist cooperative management. Empirical work relied on nine semi-structured interviews with members of cooperatives selected through purposive and snowball sampling. Cases were included either because they explicitly self-identify as feminist in their official presentation, or because they had been previously identified as potentially aligned with feminist values, either through the authors' prior knowledge of the organisations or through recommendations from key contacts. Data collection was carried out from June to September 2026, and the empirical material was analysed from an interpretive

perspective. The interview guide was organised into thematic blocks addressing the cooperative's trajectory, governance, everyday organisation of work, leadership, care practices, conflict management and the construction of a feminist identity.

Results

Preliminary analysis suggests that feminist management appears less as a fixed label than as a situated organisational practice. Across the cases, feminism is translated into different forms of governance, work organisation, leadership and care, although with important variations. In some cooperatives it is explicitly named and embedded in everyday routines, while in others it is present through practices, rules or concerns that are not always labelled as feminist. The French cases are especially useful to show this diversity: feminism may be experienced as something already incorporated into organisational life, or, in more male-dominated sectors, as an issue mainly sustained by women who have to create the conditions to name and address it. The interviews also show that horizontal and democratic governance requires structure, clarity and continuous revision. Feminist cooperatives develop mechanisms to prevent informal hierarchies and unequal participation, such as differentiated decision-making spaces, shared or rotating responsibilities, accompaniment for people entering governance roles, and deliberate attention to how information, voice and workload are distributed. Care also emerges as a central management issue, through emotional check-ins, spaces to express tensions, protocols, mediation practices, attention to salaries and workloads, and groups addressing gendered or sexist dynamics. However, these practices are not free from tension: they require time, resources and organisational responsibility, and can themselves become unevenly distributed.

Discussion

These findings will be discussed in dialogue with feminist economics, feminist organisation studies and critical SSE literature, highlighting feminist management as an ongoing organisational process rather than a fixed model. The analysis suggests that feminist cooperatives do not simply add care or equality concerns to existing cooperative structures, but question how democracy, work, leadership and sustainability are organised in everyday practice. Their experiences reveal both the transformative potential and the limits of cooperative organising when feminist values confront economic pressures, growth, professionalisation and internal inequalities. In this sense, feminist cooperatives offer valuable insights for the wider cooperative movement by exposing blind spots in conventional cooperative governance and by proposing practical ways to make participation, care, conflict management and the distribution of power more explicit, equitable and sustainable.

Contributions and Implications

This research intends to contribute to academic debates by offering empirical evidence on feminist management practices in cooperatives, an area that remains insufficiently studied within both feminist and cooperative scholarship. The study aims to propose a conceptual framework for understanding feminist cooperative management and to broaden existing discussions on democratic and participatory governance. For practitioners, the findings may offer useful reflections for organisational learning, identification of challenges and strengthening feminist practices within SSE organisations. The project also seeks to support knowledge co-production with participating cooperatives by generating insights that are relevant not only for academic debate, but also for organisations seeking to align feminist political commitments with everyday management practices.

Keywords: feminist cooperatives; Social and Solidarity Economy; feminist management; governance; liveable organisations

Theme(s): Cooperative Governance and Management; Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

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SESSION PROPOSAL

Educating for Membership - Assessing Professional Training Initiatives on Member Engagement and Commitment

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Abstract

Motivation

Member commitment and engagement are crucial for the health and well-functioning of a cooperative. Without them, cooperatives risk losing their identity and purpose. Moreover, if cooperatives loose members due to lack of commitment, it also negatively affects the efficiency of the cooperative enterprise. This is precisely why the ICA's Fifth Cooperative Principle calls on cooperatives to provide education and training for their members, elected representatives, managers and employees. In practice, however, professional training initiatives that specifically address member engagement and commitment remain uncommon. Systematic knowledge of what exists, what works, and what is missing is largely absent. Moreover, in the ICA CCR 2025, we noted a lack of cross-national learning in the field of cooperative education.

Aims

In order to address this gap, this transdisciplinary workshop has three main objectives. First, it presents and discuss the findings of a work in progress environmental scan of professional education initiatives addressing member engagement and commitment in cooperatives. Second, it aims to identify content and methodological gaps in existing training, and to explore which initiatives, also outside Europe, merit further attention. Third, it envisions to generate a set of key takeaways that can inform future training development and research on this topic.

Proposed Format

The workshop is structured in three parts.

Part 1 — Environmental Scan Presentation

Environmental scanning has proven to be a powerful tool for organizational learning. Through the continuous monitoring and systematic searching for information about changes in an organization's external environment, it enables the identification of gaps, trends, and relationships that support strategic planning and organizational improvement (Choo, 2001) and it also facilitates the identification of emerging trends, weak signals (i.e., indicators of potential change), and broader future developments (Harris & Brooker, 2025). It was originally developed within the business sector to analyse macro-environmental factors (Choo, 2001; Harris & Brooker, 2025; Kazemi et al., 2024), the method is now widely applied across broader political, economic, social, technological, legal, and environmental contexts. In this sense, environmental scanning offers a useful framework for exploring educational initiatives within the cooperative sector, which are dispersed across online sources such as organisational websites, academy pages, project announcements, and training platforms rather than scientific literature. At the same time,

the scanning process presents important challenges related to resource dependency and the availability and quality of information (Choo, 2001). In this study, the accessibility, quality, and permanence of information depended largely on websites and the continued online availability of initiatives, many of which could later be modified, relocated, or removed.

In this environmental scan, cooperative training and education initiatives were assessed by two researchers independently. As stated by Nguyen et al. (2024), there is no single or consistently standardized methodology for conducting environmental scans, and approaches often vary depending on the context, objectives, and available sources. In the initial stage, we determined the scope of the scan and identified the relevant sources. Then, a web-based search of the relevant sources using keywords rendered 80 initiatives, of which 30 were taken out applying inclusion/exclusion criteria. Manual search was complemented with an automated search using Artificial Intelligence (AI), which rendered 10 of the 50 initiatives assessed, after excluding duplicates. Of the 50 initiatives, 13 very excluded for reasons such website not available anymore or very outdated websites when analysed as a whole.

For analysing the remaining 37 initiatives, we relied on a more structured filtering and classification strategy that is closer to Choo's (2001) notion of conditioned viewing, where predefined categories and information needs guide the identification of relevant initiatives. At the same time, this deductive dimension is complemented by a more inductive analytical process that allowed training initiatives to be explored in greater depth and enabled relevant pedagogical patterns, themes, and categories to emerge iteratively throughout the scanning process.

In the workshop, we will present the results of the environmental scan, including their main characterisation of the 37 initiates and the second phase of the assessment: the eight (8) initiatives that dealt with member engagement and commitment, including how these themes were constructed.

Part 2 — World Café

Participants will discuss across three tables, and each of them will be facilitated by a rapporteur who records key points on a shared template.

• Table 1 — Challenges: What are the main obstacles to developing and sustaining training initiatives on member engagement and commitment?

• Table 2 — Missing initiatives: Which other training initiatives would be worth exploring, including outside Europe?

• Table 3 — Future content and methods: What should future training on member engagement and commitment include, and which methodologies are best suited to deliver it?

Part 3 — Synthesis

We will close the workshop by drawing together a shared list of key takeaways, including points of convergence that can serve as a starting point for future collaboration and research. The takeaways, together with the full workshop notes, will be shared via Email with all participants after the conference.

The Audience

We would like to warmly invite members of training institutes, cooperative associations and researchers working on member engagement, commitment and cooperative governance.

Keywords: Education; Member Engagement; Member commitment; Participation; Membership relationship

Theme(s): Cooperative Governance and Management; Education and Training about / for Cooperatives

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Cooperative taxation in Spain: A real competitive advantage compared to SMEs?

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Abstract

Background

Cooperatives are one of the most representative forms of social economy enterprises in Spain. Their legal and fiscal regulation reflects a historical tradition of institutional promotion, based on their contribution to stable employment, territorial cohesion, and democratic participation of members (Chaves & Monzón, 2018). Article 129.2 of the Spanish Constitution establishes the obligation of public authorities to effectively promote these societies.

From a tax perspective, cooperatives benefit from a specific fiscal regime under Law 20/1990 on the Tax Regime of Cooperatives, which provides tax differentiation with advantages over the general Corporate Income Tax. Key features include the distinction between cooperative and non-cooperative income, reduced tax rates, and, notably, the 50% reduction in the corporate tax liability for cooperatives classified as particularly protected, such as worker cooperatives or agricultural cooperatives that meet specific requirements (Vázquez et al., 2025). Additionally, regional tax competencies, particularly in the foral territories, generate differences in effective tax pressure (Zaldua, 2024).

Traditionally, this regime was justified as compensation for structural limitations inherent to the cooperative model, such as restrictions on profit distribution or difficulties in capital accumulation. However, debate has intensified regarding whether it remains necessary or whether it confers competitive advantages relative to Small and Medium Entreprises (SME) and may even constitute state aid under European law (Azcoaga, 2015).

The relevance of this analysis has increased with recent tax reforms aimed at entrepreneurship and SME support (Atxabal, 2020). Reduced rates, innovation incentives, and tax benefits for newly established firms have partially narrowed the gap between cooperative and corporate taxation, although the 50% reduction remains a distinctive feature.

A further and particularly significant factor affecting the tax treatment of cooperative societies in Spain, excluding País Vasco and Navarre, is the existence, in each Autonomous Community, of a distinct and specific regional Cooperative Societies Law. These autonomous regulations establish, among other matters, the rules governing the determination and allocation of the cooperative's accounting financial result, as well as the minimum compulsory allocations that must be made to the Mandatory Reserve Funds. Both issues are especially relevant from a tax perspective, since they may produce differences in the taxable position of cooperatives depending exclusively on the location of their registered office. This territorial differentiation does not generally arise in the case of small and medium-sized enterprises (SMEs), whose tax treatment is not ordinarily conditioned by equivalent regional rules concerning the allocation of accounting results to mandatory cooperative reserves. Consequently, in certain Autonomous Communities, the legal requirement to make higher compulsory allocations to reserve funds may reduce the amount available for distribution or otherwise affect the cooperative's taxable base, thereby increasing the effective tax burden borne by cooperatives in comparison with similarly situated SMEs.

Within this context, it is necessary to analyze whether cooperative taxation represents a real competitive advantage or primarily compensates structural characteristics of the cooperative model.

Aims

The main objective is to assess whether cooperative taxation in Spain constitutes an effective mechanism of protection and competitive advantage compared to traditional SMEs.

Specific objectives: Comparing cooperative taxation with SME taxation following recent reforms and identifying whether the fiscal regime generates competitive distortions or operates as a compensatory mechanism.

Methods

A systematic review of the scientific literature on cooperative taxation and social economy published in indexed journals was conducted, identifying doctrinal positions on the justification and scope of the special regime. The regulatory framework was also examined, focusing on Law 20/1990 and its interaction with Corporate Income Tax. Tax incentives were analyzed, including specific rates, partial exemptions, and the 50% reduction in liability for special protected cooperatives. Recent empirical studies on effective taxation were evaluated to determine whether tax benefits significantly reduce the overall fiscal burden compared to other business forms.

Finally, a comparative analysis was performed with the tax treatment applicable to SMEs under the general regime, considering recent incentives designed to enhance business competitiveness.

Discussion

The cooperative tax regime combines fiscal incentives with specific requirements designed to preserve the cooperative nature of these entities. The distinction between cooperative and non-cooperative income allows cooperative income, derived from transactions with members, to receive more favorable treatment, while non-cooperative income is generally taxed under the general regime.

The 50% reduction in corporate tax for special protected cooperatives represents one of the most relevant incentives, substantially lowering the effective tax burden, especially for cooperatives where cooperative income predominates.

From an economic perspective, this incentive can be seen as a promotion mechanism for the cooperative model, but it raises questions regarding its impact on competition with enterprises operating in the same markets. The effective fiscal advantage depends on the cooperative's economic structure and the proportion of cooperative versus non-cooperative income. In many cases, effective taxation does not substantially differ from that of commercial companies engaged in similar activities (Vázquez et al., 2025).

However, it should be emphasised that the 50% tax credit is available only to six specific categories of cooperative societies, and even then only where they satisfy a set of particularly stringent statutory requirements. Through these conditions, the legislature seeks to ensure that the fiscal benefit is directed towards cooperatives whose membership is predominantly composed of economically weaker groups and small-scale producers. This includes small agricultural producers in the case of agricultural cooperatives; small-scale producers and workers engaged in maritime and fisheries related activities in the case of maritime cooperatives; and individuals with limited productive resources in the case of cooperatives devoted to the communal exploitation of land. The benefit may likewise apply to worker cooperatives, whose members are employees or worker members; to housing cooperatives, which generally bring together individuals of limited means seeking access to housing; and to consumer and user cooperatives, whose members are consumers rather than commercial intermediaries or large-scale economic operators.

In all of these cases, the relevant statutory conditions are designed to ensure, in unequivocal terms, that the cooperative's principal purpose is to improve and protect the economic interests and performance of its members. The legislature therefore imposes specific economic and membership related requirements which, in practice, can generally be satisfied only where the members possess a relatively limited level of economic capacity or operate on a small scale. From the legislature's perspective, these restrictions provide the rationale for granting the tax credit: the fiscal advantage is intended to compensate cooperatives that serve particularly vulnerable or economically constrained groups and that pursue a

clearly defined mutual-benefit objective. Nevertheless, the very selective nature of the measure, together with the fact that it favours only certain categories of cooperative societies subject to restrictive eligibility criteria, reinforces the arguments supporting its possible classification as State aid. In particular, the measure may be regarded as conferring a selective economic advantage on specific undertakings or categories of undertakings, not with standing its stated social and mutualistic justification.

Recent tax reforms have narrowed certain differences in the tax treatment of cooperative societies and small and medium-sized enterprises (SMEs). In particular, where the taxpayer's turnover in the immediately preceding financial year is below 1 million euros, the applicable rate of Corporate Income Tax is reduced. This reduced rate also applies to cooperative societies; however, in their case, it is subject to a further reduction of three percentage points. The legislature has therefore expressly recognised the distinctive legal and economic nature of cooperatives and has incorporated a specific provision enabling them to benefit from the reduction in corporate tax rates to a greater extent than ordinary SMEs. This approach may be understood as an attempt to adapt the general tax regime applicable to smaller businesses to the particular characteristics of cooperative entities, whose economic activity is structured around the mutual benefit of their members rather than the remuneration of external shareholders.

Nevertheless, cooperative societies are not eligible for the 15% Corporate Income Tax rate applicable to newly established companies during the first two financial years in which they obtain a positive taxable base. This exclusion appears unlikely to be the result of a mere drafting error or an unintended consequence of legislative technique. Rather, the tax administration has confirmed this interpretation through internal technical notes and administrative guidance. Accordingly, the different treatment seems to reflect a deliberate legislative or administrative decision, not with standing the fact that newly created cooperatives may, in practice, face many of the same initial financial constraints, investment needs and economic uncertainties as other newly established enterprises. The exclusion therefore introduces a further asymmetry into the comparative tax treatment of cooperatives and SMEs: although cooperatives may benefit from a particularly favourable reduced rate when their turnover remains below the statutory threshold, they are denied access to the preferential start-up rate available to newly incorporated companies during the initial years in which they begin to generate positive taxable income.

So, reduced rates for new businesses, investment incentives, and innovation deductions have partially aligned SME taxation with cooperative taxation. Nonetheless, the 50% reduction remains a significant differentiating factor, although it only applies to those types of cooperatives that the Law classifies as special protected.

This fiscal advantage should be evaluated alongside structural limitations of the cooperative model, such as restrictions on surplus distribution, mandatory reserve requirements, and democratic governance, which partially offset the tax benefit.

Contributions and Implications

The analysis confirm that cooperative taxation constitutes a differentiated system with incentives aimed at promoting the social economy. The 50% reduction for special protected cooperatives represents a tangible benefit that may create a competitive advantage over SMEs, particularly when cooperative income predominates.

However, the effective advantage is not uniform and depends on the cooperative's economic structure and classification. For cooperatives with significant non-cooperative income, the difference compared to SMEs may be limited.

It should be emphasised, above all, that this preferential tax treatment is available, as noted above, only to cooperative societies whose membership consists of individuals or entities with a relatively limited economic capacity. Moreover, eligibility is confined to six specific categories of cooperatives that are entitled to benefit from this regime of special fiscal protection: agricultural cooperatives; worker cooperatives; consumer and user cooperatives; housing cooperatives; cooperatives for the communal exploitation of land; and maritime cooperatives.

The restrictive nature of this classification is particularly significant because it demonstrates that the legislature does not intend to extend the relevant tax advantage to cooperatives as a general category. Rather, the benefit is reserved for those forms of cooperation that traditionally bring together small-scale producers, workers, consumers, prospective homeowners, small landholders or persons engaged in maritime activities. In this respect, the classification reflects the legislature's apparent intention to protect cooperatives whose mutual purpose is closely connected with the economic advancement and collective defence of members who possess limited individual financial resources.

It is also evident that the legislature has repeatedly failed to take the specific legal and economic characteristics of cooperative societies into account when introducing tax reductions for newly established enterprises. In particular, cooperatives have not been included within the scope of the reduced Corporate Income Tax rate applicable to newly created companies, even though newly established cooperatives may face comparable start-up costs, financing difficulties and economic uncertainties. Their exclusion therefore generates a disadvantageous difference in treatment and may be regarded as a form of discrimination against cooperative entities. This omission is especially difficult to justify where the general objective of the measure is to promote entrepreneurship, facilitate the creation of new economic activities and support enterprises during their initial years of operation, objectives that may apply equally to cooperatives and to conventional companies.

These findings have multiple implications. They reinforce the legitimacy of the special tax regime as a tool for promoting the social economy but highlight the need to balance fiscal incentives with competitive neutrality to avoid market distortions. Additionally, the results can inform potential future reforms, including regulatory simplification or adaptation of incentives to new forms of social entrepreneurship (Aguilar, 2024).

Overall, the research contributes to a better understanding of the role of cooperatives in the Spanish economy and how the special tax regime balances institutional promotion with business competitiveness.

Keywords: Corporate Income taxation; Cooperatives versus SME; Spanish tax framework; Fiscal incentives; Tax driven competitive advantage

Theme(s): Cooperative Governance and Management; Cooperative Law

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Reverse hybridization and the dangerous middle: Ownership-governance score alignment and social capital in member-owned hybrid organizations

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Abstract

Hybrid organizations increasingly combine organizational elements associated with different institutional logics, creating opportunities for adaptation but also tensions around ownership, control, accountability, identity, and performance. Research on hybrid organizing has shown that organizations can accommodate competing logics through selective coupling, negotiation, and structured flexibility, but less is known about whether organizational performance changes systematically as the degree of hybridization increases or whether performance also depends on how the resulting organizational arrangements fit together (Battilana & Lee, 2014; Besharov & Smith, 2014; Smith & Besharov, 2019). This question is especially relevant for member-owned organizations. Agricultural cooperatives increasingly adopt ownership and governance mechanisms traditionally associated with investor-owned firms (IOFs), including differentiated ownership rights, alternative capital instruments, professionalized management and boards, and more flexible decision-making arrangements (Chaddad & Cook, 2004; Cook & Chaddad, 2004). We refer to this movement as reverse hybridization. Rather than interpreting reverse hybridization as a simple shift from a cooperative toward an IOF model, we conceptualize it as a process of organizational redesign in which elements associated with different organizational logics are selectively combined.

This study examines how reverse hybridization is associated with multidimensional organizational performance and whether its consequences depend on the alignment of ownership and governance arrangements and on the cooperative's internal social capital. We argue that hybridization is not necessarily beneficial or detrimental in itself. At intermediate levels, cooperatives may enter a “dangerous middle” in which new ownership or governance mechanisms are layered onto inherited cooperative arrangements without sufficient organizational realignment. Such configurations may increase complexity, ambiguity, and coordination costs before the potential advantages associated with more extensively redesigned organizational architectures emerge. We therefore investigate a potential U-shaped association between reverse hybridization and performance. At the same time, we distinguish the degree of hybridization from ownership-governance score alignment, defined as the alignment between the ownership and governance dimensions of hybridization. We also examine internal social capital as an informal governance resource based on trust, reciprocity, relational quality, and shared norms (Nahapiet & Ghoshal, 1998).

The empirical analysis uses original cross-sectional data collected in 2024 through structured interviews with managers of 466 agri-food cooperatives in Spain, Italy, France, Greece, and Türkiye. After listwise deletion for missing information on the dependent variable, social capital, age, and size, the main estimation sample comprises 415 cooperatives operating primarily in the wine, dairy, and olive-oil sectors. Reverse hybridization is measured through a composite index based on 15 normalized ownership and governance components. Eleven components capture ownership arrangements, including financing sources, equity characteristics, restrictions on redemption and transferability, participation of non-members in capital, and residual claims, while four capture governance arrangements, including management and board professionalization and voting mechanisms. Ownership-governance score alignment ranges from zero, indicating maximum divergence between the two dimensions, to one,

indicating identical ownership and governance hybridization scores. Internal social capital is measured using a multi-item scale, while performance is captured through a multidimensional factor combining managers' assessments of competitiveness, economic profitability, member satisfaction, achievement of organizational goals, and overall cooperative performance. The empirical models are estimated using OLS with heteroskedasticity-robust standard errors and control for cooperative size, age, sector, and country.

The results show, first, a strong and robust positive association between internal social capital and multidimensional cooperative performance. In the baseline model, its coefficient is positive and highly significant, supporting the interpretation of trust, reciprocity, and shared norms as important informal governance resources. Second, the baseline estimates provide qualified evidence consistent with the hypothesized dangerous-middle pattern. The linear reverse hybridization term is negative and statistically significant, and its quadratic term is positive. The estimated turning point, lies within the observed range of the hybridization index. However, the formal intersection-union test reaches only the 10% significance level ($p = 0.090$), and only 13.3% of the cooperatives lie above the estimated turning point. The increasing branch is therefore estimated with substantially less precision, and the observed recovery at higher levels of hybridization is only partial. Accordingly, the results should be interpreted as tentative evidence consistent with, rather than definitive proof of, a U-shaped relationship. Disaggregated analyses indicate that this non-linear pattern is particularly visible for manager-rated member satisfaction, suggesting that governance tensions associated with partial organizational redesign may become visible in members' evaluations before they are reflected in economic or competitive outcomes.

Third, and most importantly, ownership-governance score alignment is positively and significantly associated with multidimensional perceived performance. Conditional on the overall degree of reverse hybridization, cooperatives whose ownership and governance hybridization scores are more closely aligned report better performance. Once alignment is incorporated into the model, the linear and quadratic reverse hybridization terms lose statistical significance. Because the alignment measure is constructed from dimensions that also contribute to the hybridization index, this result is not interpreted as evidence of causal mediation. Rather, it indicates that the configuration of hybrid organizational features contains relevant performance information beyond the overall degree of hybridization.

These findings contribute to research on hybrid organizing by distinguishing between the degree of organizational hybridization and the alignment of the organizational arrangements through which hybridization occurs. Organizations displaying similar levels of hybridity may perform differently depending on whether changes in ownership and governance are mutually aligned or instead create gaps within the organizational architecture. For cooperative research, this helps explain why the adoption of IOF-like mechanisms may generate heterogeneous outcomes and reinforces the view of reverse hybridization as organizational redesign rather than as a simple movement along a cooperative-IOF continuum. The findings also distinguish formal and informal governance channels: ownership-governance alignment captures a configurational aspect of formal organizational design, whereas social capital provides a complementary relational resource that supports performance but does not appear to compensate systematically for formal misalignment. For managers and boards, the results caution against introducing professionalization, alternative capital arrangements, or differentiated rights as isolated organizational fixes. Changes in ownership and governance should instead be considered jointly, while member satisfaction can provide an early indication of strain during organizational transformation. For policymakers and cooperative support organizations, facilitating access to capital or professionalization should therefore be accompanied by governance advice and mechanisms that help cooperatives preserve alignment, transparency, member participation, and relational quality as their organizational model evolves.

Keywords: Reverse hybridization; hybrid organizations; ownership-governance alignment; social capital; cooperatives

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Residential Care Facilities for the Elderly (ERPI) and Decent Work for Caregivers: What Role Do Cooperatives Play?

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Abstract

By 2050, people aged 65 and over are expected to account for almost 30% of the population across the 38 member countries of the Organisation for Economic Co-operation and Development (OECD). Population ageing will increase both the need for and the supply of services for elderly people. In Portugal, Residential Care Facilities for elderly People (Estruturas Residenciais para Pessoas Idosas, ERPIs) provide institutional care to approximately 100,000 residents and are funded and regulated by the State. Of the 143 social solidarity cooperatives (SSCs) legally equivalent to Private Institutions of Social Solidarity (IPSSs), only 8 operate an ERPI, a very small presence among the 2 646 ERPIs in mainland Portugal. This social response relies heavily on human labour in a sector characterised by demanding work, difficult working conditions and low pay. This study seeks to understand the role of human resource management practices in promoting decent work for employees in an ERPI managed by a social solidarity cooperative. It also argues some of the reasons why these cooperatives entered the elder-care sector. The research adopted an exploratory and interpretive qualitative case-study design. Data were collected through a semi-structured interview with the chair of a social solidarity cooperative that operates an ERPI. The interview was audio-recorded, fully transcribed and subjected to content analysis with the support of MAXQDA, using categories derived from the conceptual framework.The findings show that the cooperative emerged from within the cooperative movement in response to a need identified in the community. Its creation was also driven by the need to secure public funding, because entering cooperation agreements with the State required establishing an entity legally equivalent to an IPSS. Employees are the institution's main asset and the core of its activity, yet paradoxically they are also one of its main vulnerabilities. Recruitment and retention are difficult, a situation compounded by current immigration legislation. Consistent with the literature, the work is physically and psychologically demanding, particularly because around 80% of residents are dependent and absenteeism is recurrent. Low wages may also leave workers at risk of in-work poverty. The organisation therefore remains far from fully meeting the dimensions of decent work. The findings are consistent with the Job Demands–Resources model, according to which an imbalance between demands and resources can undermine employee well-being (Bakker & Demerouti, 2007). Human resource management should consequently move towards the mutual-gains approach proposed by Grote and Guest (2017), which may benefit both employees and the cooperative. Cooperation agreements, as a management instrument, ought to facilitate and promote decent work through implementing human resource management practices designed to generate mutual gains. This challenge is discussed.

Background

Improvements in living conditions have enabled humanity to achieve unprecedented longevity. By 2050, almost 30% of the population in the 38 Organization for Economic Co-operation and Development (OECD) countries is expected to be aged over 65 (OECD, 2023). Population ageing is therefore one of the major challenges of our time. It is likely increase the number of elderly people living with illness and dependency, many of whom will require third-party support to meet everyday needs (EC, 2021; OECD, 2023; European Commission, 2024). Over the next half-century, it will be a substantial increase in both the demand for and the supply of institutional care services appears unavoidable (European Commission, 2024; OECD, 2023).

Social transformations over the past three decades have shifted a significant share of elder care from families to organizations originating in the State, the market and the community (European Commission,

2024; OECD, 2023). Care for elderly people continues to depend primarily on a human workforce and is associated with high psychological and physical demands that may jeopardize workers' mental and physical health. The sector is also known for poor employment conditions, including wages around 20% below the overall average, limited recognition, unstable employment and insufficient training (OECD, 2023).

Decent work and employee well-being have consequently become increasingly important. Human resource management scholarship has moved beyond a narrow focus on performance to address employee well-being, positive employment relationships and mutual gains in both processes and outcomes (Guest, 2017; Grote & Guest, 2017; Guest et al., 2020).

In Portugal, residential elder care is provided mainly through ERPIs. These services receive State support through cooperation agreements with IPSSs or legally equivalent entities (Decree-Law No. 120/2015 of 30 June; Article 6 of Ministerial Order No. 218-D/2019 of 15 July). IPSSs may take the legal form of associations, mutual associations, misericórdias, foundations or cooperatives.

The presence of cooperatives in the ERPI sector is residual. Only 8 of the 143 cooperatives with IPSS-equivalent status operate an ERPI, out of a total of 2 646 ERPIs in mainland Portugal (DGSS, 2026). Social solidarity cooperatives play a relevant role in the social economy and in the development of the welfare state by responding to needs not fully met by either the State or the market (Ferreira, 2025). Unlike other cooperatives, their purpose is grounded in altruism and solidarity rather than mutuality, and their activity is directed towards community needs rather than exclusively towards members' needs (Meira, 2018).

Against this background, the study addresses two questions:

1. In the Portuguese system of State-funded cooperation agreements, what role do human resource management practices play in promoting and facilitating decent work for care workers in an ERPI organized as a cooperative?

2. Why has elder care become an area of activity for social solidarity cooperatives in Portuguese society?

ERPIs, Cooperation Agreements, Cooperatives and Decent Work

ERPIs, Residential Care and Cooperation Agreements

Ageing increases the risk of illness and disability, and many elderly people gradually become frailer and more dependent on long-term care. This need does not arise simply because they are old, but because health conditions or disabilities may prevent them from living independently without third-party support (EC, 2021; OECD, 2023; European Commission, 2024). Care may be provided by informal carers and/or by long-term or institutional care services, including home-support services, day centers, residential homes, palliative care and integrated continuing care. Demand for institutional care is therefore expected to increase in the coming years.

In Portugal, the most widespread residential response for elderly people is the ERPI, accommodating approximately 100 000 residents. It is legally defined "as an establishment providing collective accommodation, on a temporary or permanent basis, where social support activities and care suited to the needs of elderly people and their families are delivered" (Article 1(2), Ministerial Order No. 349/2023 of 13 November). Its main objectives are to provide permanent and person-centred care, promote active ageing and inclusion, ensure a safe environment and offer a broad range of services, including meals, hygiene, nursing care, assistance with activities of daily living and psychosocial support.

ERPI licensing and operation are highly regulated, including regular monitoring by Social Security and mandatory staffing requirements. Table 1 summarizes the staffing framework established by Ministerial Order No. 349/2023.

Table 1. Mandatory staffing framework for an ERPI

Role	No. of staff	Working arrangement	Requirement
Technical director	1	Full-time	General rule
	1	Part-time (50%)	ERPI capacity below 31 residents

	1	Part-time, three hours per day	ERPI capacity below 15 residents; variable schedule with mandatory presence
Sociocultural facilitator / social educator / gerontology technician	1	Part-time	Per 40 residents
Nurse	1	Full-time	Per 40 residents, or per 20 highly dependent residents*
Direct care assistant	1	Full-time	Per 8 residents, or per 5 highly dependent residents*
	1	Full-time	Per 20 residents, night period
Domestic services supervisor	1	Full-time	Facilities with capacity above 39 residents
Cook	1	Full-time	Per establishment
Kitchen assistant	1	Full-time	Per 20 residents
General support worker	1	Full-time	Per 20 residents, or per 5 highly dependent residents*
Quality manager	1	Part-time	May be combined with other ERPI duties and may cover several facilities

* Ratio applicable where the ERPI accommodates elderly people in a situation of high dependency.

Source: Authors' compilation based on Ministerial Order No. 349/2023 of 13 November.

The staffing framework may be adapted with the "necessary flexibility" according to operational characteristics and the characteristics or number of residents. When meal preparation, environmental hygiene and laundry services are outsourced, the personnel assigned to kitchen and cleaning duties are not required. The legislation also places particular emphasis on staff training as a fundamental management practice. Training should be provided at induction and on a continuing basis and should be adapted to employees' duties and professional categories.

ERPIs are funded through cooperation agreements. In legal terms, "cooperation between the State and institutions is a contractual partnership based on shared objectives and interests and on the allocation of obligations and responsibilities" (Article 2, Decree-Law No. 120/2015 of 30 June).

Social Solidarity Cooperatives in Portugal

Portuguese cooperatives form part of the social economy and may pursue economic objectives and social purposes simultaneously, depending on the nature of their activity (Meira, 2018; Law No. 119/2015 of 31 August). They are particularly relevant as instruments of democratic participation, solidarity and local development, contributing to the response to the economic and social needs of communities (Pedroso, 2025).

The Portuguese Cooperative Code defines cooperatives "as autonomous legal persons, freely established, with variable capital and membership, which, through cooperation and mutual assistance among members and in accordance with cooperative principles, pursue without profit the satisfaction of members' economic, social or cultural needs and aspirations" (Article 2(1), Law No. 119/2015). This definition highlights a model in which people and their needs prevail over the remuneration of capital and in which economic objectives are combined with social and cultural purposes.

Cooperatives operate according to the principles of voluntary and open membership, democratic member control, member economic participation, autonomy and independence, education, training and information, cooperation among cooperatives, and concern for the community. Grounded in mutual assistance, democracy, equality, equity and solidarity, they constitute forms of collective action that allow members to meet shared needs while contributing to individual well-being and community development in which they operate (Namorado, 2013; Pedroso, 2025).

Their collective orientation enables cooperatives to generate social value, reduce inequality, promote inclusion and strengthen territorial cohesion. They can also contribute to sustainable development, social innovation and the economic resilience of their communities (Ferreira, 2025; Pedroso, 2025). In social

solidarity cooperatives, surpluses are allocated to cooperative reserves and may not be distributed among members.

Meira (2018) emphasizes the specificity of social solidarity cooperatives, whose activities are directed towards the general interest of the community and are based on solidarity. These organizations provide responses to groups in vulnerable situations, including people with disabilities, children, young people, families and elderly people. They have played an important role in social inclusion, equal opportunities, social cohesion and local development.

Social solidarity cooperatives emerged in Portugal after the Revolution of 25 April 1974, during the consolidation of the social economy and the development of the welfare state. Historically, many focused on children and young people with disabilities through CERCI organizations, created by families, professionals and local communities in response to a shortage of education and rehabilitation provision. These organizations subsequently evolved towards intervention models centered on inclusion, empowerment and social participation. Their involvement in elder care is comparatively recent, as illustrated by this case study.

Human Resource Management and Decent Work

The Job Demands–Resources (JD-R) model explains how job characteristics influence employee well-being and performance (Demerouti et al., 2001). It distinguishes two broad categories: job demands and job resources. Job demands are the physical, psychological, social or organizational aspects of work that require sustained effort and are associated with physiological or psychological costs. Job resources are aspects of work that support the achievement of work goals, reduce the impact of demands and promote learning, development and motivation (Bakker & Demerouti, 2007). Common resources include autonomy, social support, feedback and opportunities for professional development.

The JD-R model proposes two interconnected psychological processes. In the health-impairment process, prolonged exposure to high demands depletes physical and psychological resources and increases the risk of exhaustion, burnout and other health problems. In the motivational process, job resources foster work engagement, expressed through vigour, dedication and absorption. Organisational resources may also buffer the negative effects of job demands. Not all demands are necessarily harmful: some may be perceived as challenges that encourage learning and performance, whereas others function as obstacles to well-being and professional effectiveness (Crawford et al., 2010).

The model later evolved into a broader theory that incorporated personal resources and acknowledged employees' active role in managing demands and resources. It is now widely used to explain burnout, work engagement, job satisfaction and performance, and it supports Human Resource Management (HRM) diagnosis by identifying imbalances and guiding organizational interventions (Bakker & Demerouti, 2017).

Decent work and employee well-being are important because HRM should not focus on performance alone. It should also promote well-being and a positive employment relationship. In this vein, Grote and Guest (2017) present ten dimensions of quality of working life, drawing on Walton's framework and adding individual proactivity and flexible working to reflect contemporary employment relations.

Table 2. Updated dimensions of quality of working life

Dimension	Description
Adequate and fair compensation	Pay that meets socially defined minimum standards and equity criteria; equal pay for work of equal value.
Safe and healthy environment	Promotion of occupational health and safe, healthy working conditions.
Development of human capabilities	Jobs that develop skills, decision-making autonomy and task identity.
Growth and security	Jobs that enhance employability and provide personal and professional development opportunities.
Social integration	A positive and psychologically safe organizational environment that values diversity and inclusion.
Constitutionalism	Respect for and protection of employee rights and the existence of employee representation mechanisms.

The total life space	Appropriate concern for balance across work, family, leisure and community life.
Social relevance	Adoption of socially responsible organizational practices.
Individual proactivity*	Support for personal initiative without improperly transferring employment risks to workers.
Flexible working*	Flexible arrangements that reconcile the interests of the organization and employees.

* New criteria not included in Walton's original list. Source: Grote and Guest (2017, p. 156).

Source: (Grote & Guest, 2017, p. 156)

Together, these criteria show that quality of working life depends not only on material and organizational conditions provided by the employer, but also on autonomy, well-being, participation and the reconciliation of employees' interests with organizational objectives.

From a mutual-gains perspective, HRM practices should be designed to benefit employees and organizations simultaneously. Improved quality of working life should not be treated solely as a cost, but as an investment in sustainable performance. Table 3 sets HRM practices oriented towards mutual gains and presents their main measures and expected benefits.

Table 3. Human resource management practices oriented towards mutual gains

Practice bundle	Main measures	Benefits for employees	Benefits for the organisation
1. Development of human capabilities	Continuous training; organisational learning; autonomy; job enrichment.	Skills development; improved employability; more active participation.	A more skilled, adaptable and innovative workforce; stronger organisational capability.
2. Fair rewards and employment security	Equitable pay systems; career progression; employment stability.	Perceived organisational justice; satisfaction; security and progression prospects.	Greater commitment; lower turnover; stronger retention.
3. Occupational health, safety and well-being	Safe and healthy workplaces; prevention of physical and psychosocial risks; mental-health and well-being policies.	Protection of physical and psychological health; reduced stress; greater well-being.	Lower absenteeism, fewer accidents and illness-related costs; improved productivity.
4. Social integration and employee participation	Participation in decisions; a climate of trust; teamwork; respect for employee rights.	Belonging, motivation and commitment; influence over relevant aspects of work.	Better organisational solutions; cooperation and innovation.
5. Work-life balance and flexible working	Flexible schedules; remote working where feasible; other flexible arrangements.	Better coordination of work, personal and family responsibilities.	Improved attraction and retention; stronger employer reputation.

Source: Authors' compilation based on Grote and Guest (2017).

In summary, mutual gains require integrated HRM practices directed towards shared value creation. Investment in employee development, fair and healthy working conditions, participation and flexibility responds to employee needs while supporting sustainable organizational performance. Decent work can contribute to greater commitment, engagement and collaboration, lower absenteeism and turnover, and better performance (Guest, 2017).

This perspective is consistent with the International Labor Organization's (ILO) concept of decent work. The ILO treats decent work as a central reference for employment conditions and social justice, encompassing productive work with fair remuneration, workplace security and social protection, personal development and social integration, freedom to express concerns, organization and participation in decisions, and equal opportunity and treatment.

Figure 1. Core dimensions of decent work (ILO)

Source: Authors' adaptation based on ILO (2018).

The study therefore seeks to identify and analyzes how cooperatives, supported by the State through cooperation agreements, contribute to decent work and how public policy might improve employment conditions in ERPIs.

Methods

Method

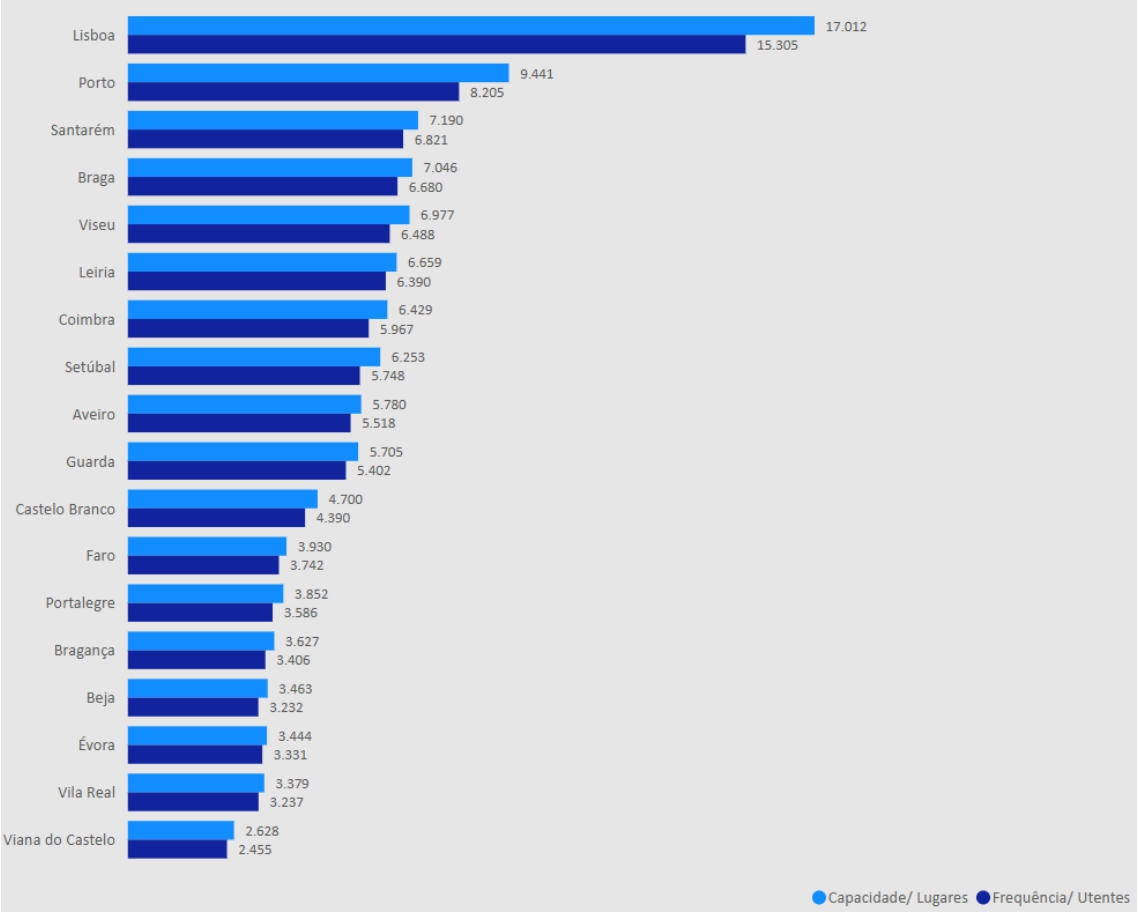
The research questions were examined through an exploratory and interpretive qualitative case study. The aim was to understand the HRM and workforce challenges faced by cooperatives operating ERPIs.

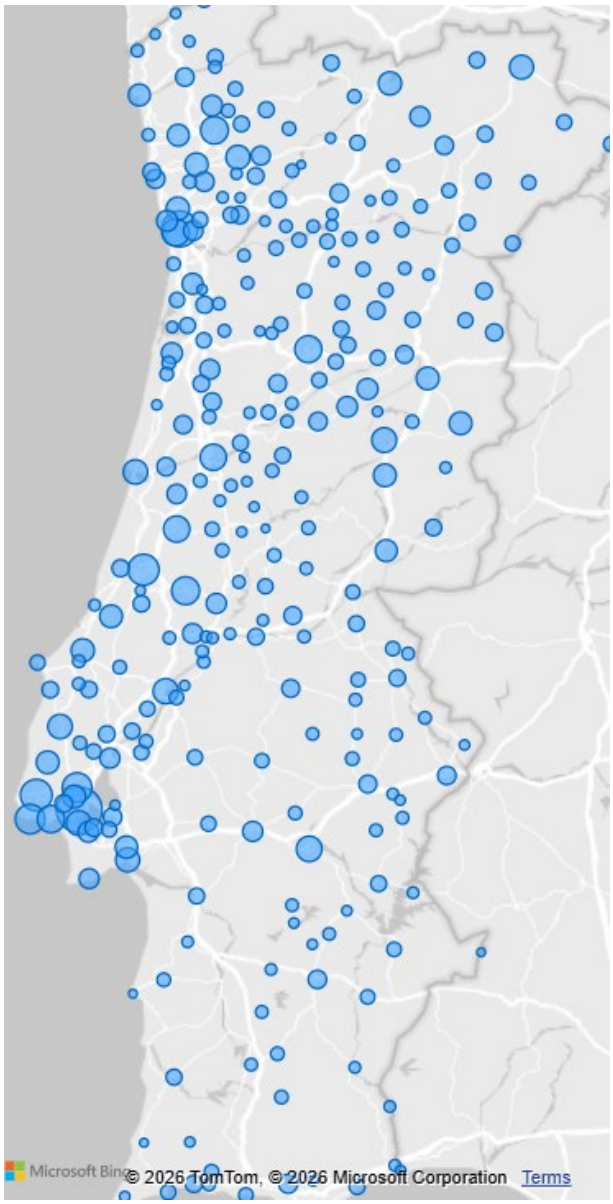
Data were collected through a semi-structured, audio-recorded interview based on a predefined guide containing open-ended questions about HRM practices in an ERPI managed by a social solidarity cooperative. A 90-minute interview was conducted with the chair of the cooperative on 20 July 2026. The interview was transcribed in full and analyzed using qualitative content analysis supported by MAXQDA. Coding categories were derived from the conceptual framework presented above.

Context and Sample

In mainland Portugal in 2025, 2 646 ERPIs provided an installed capacity of 107 515 places and accommodated 99 903 residents, corresponding to an occupancy rate of 92%. Figure 2 presents the regional distribution of capacity and occupancy.

Figure 2. Regional distribution of ERPI places in mainland Portugal, 2025





Source: Social Charter 2026.

The data show an extensive network of ERPIs across mainland Portugal. Lisbon and Porto have the largest capacities, broadly reflecting national population distribution. Nevertheless, some coastal and inland districts with very different demographic profiles have similar provision. Aveiro and Guarda, for example, each offer approximately 5 700 places. Only 8 ERPIs were operated by institutions with cooperative status.

According to the Directorate-General for Social Security, Portugal had 143 cooperatives with IPSS status in 2024. Seventy percent had cooperation agreements covering disability, childhood, social integration and poverty reduction. The 52 CERCI organizations represented around 30% of all SSCs and 50% of cooperatives with cooperation agreements. Similar arrangements exist in healthcare through the National Network for Integrated Continuing Care. Forty-four IPSS-equivalent SSCs, around 30% of the total, had no cooperation agreement and worked in mental health, community activities, active and healthy ageing, tourism or local development. Of the 8 cooperatives in mainland Portugal operating an ERPI under a cooperation agreement, one in the Porto metropolitan area was selected for this study.

Institutional Profile

The ERPI examined in this study began operating in June 2010. It has capacity for 40 residents and currently has an occupancy rate of 100%. All residents are over 80 years old; 80% are dependent and 20% are

autonomous. The chair described an autonomous resident as someone who can walk independently in the morning, perform personal hygiene, move between floors and eat without assistance.

The chair also noted that several dependent residents should arguably receive healthcare in integrated continuing-care units. Because those services lack sufficient capacity, ERPIs accommodate residents who might otherwise spend two or three years in continuing-care facilities.

Employees

Table 4 presents the ERPI workforce, professional categories, working hours and remuneration.

Table 4. ERPI workforce, working hours, schedules and remuneration

Role	No. of employees	Weekly hours	Schedule	Remuneration
Technical director	1	35	Regular, 09:00–17:00	€1,300 gross + €145 allowance
Social activities facilitator	1	35	Regular, 09:00–17:00	€1,300 gross
Direct care assistants / geriatric care assistants*	15	37	Shifts and weekends	€942 + 25% shift allowance + meals
General services assistants (cleaning and housekeeping)	4	40	Regular, 08:00–17:00	€920

* Direct care assistants work three shifts and weekends because residents require care 24 hours a day. Weekly rest comprises two days, including at least one complete Saturday and Sunday per month. Source: Interview; authors' compilation.

Source: Authors' compilation

The table shows that working hours and remuneration vary according to duties and occupational category. The institution employs 21 workers for 40 residents, close to one employee for every two residents. This headcount excludes catering staff, nurses and doctors, whose services are outsourced.

Recruitment is conducted through employment centers. The minimum educational requirement is generally completion of the 9º year of schooling. Younger applicants increasingly have completed, or partly completed, the twelfth year, whereas elderly staff previously entered geriatric care with the 9º year and cleaning work with primary education. Preference is given to applicants with relevant vocational training, although the chair stressed that holding a certificate does not necessarily ensure practical competence.

Results and Discussion

The Cooperative

The ERPI was created in response to the perceived need for residential provision for elderly people:

"There are more and more elderly people. […] There was a need to build an ERPI." (Chair)

The cooperative itself was established partly to obtain funding through cooperation agreements. Housing and construction cooperatives were not legally eligible to enter such agreements or to obtain IPSS-equivalent status. The same directors therefore created a new SSC whose statutes enabled it to contract with Social Security.

"We were already a cooperative, so the social cooperative is, so to speak, a daughter of the housing cooperative. […] It was very simple, because our nature was already cooperative. The same governing bodies formed a new social cooperative." (Chair)

The cooperative model was described as advantageous for residents because the institution does not seek profit, although it must avoid losses. Open membership was also presented as an advantage, reflecting the cooperative "open-door" principle. The chair further emphasized accountability to members in the general assembly and the cooperative's autonomous and independent character.

Funding and Financial Management of the ERPI

Funding Sources

The ERPI's main funding sources are Social Security payments through cooperation agreements, accounting for around 40%, residents' fees, and support from the parent housing cooperative through funding and technical services. Cooperation agreements are essential to enable residents with limited financial resources to enter and remain in the facility.

"Without cooperation agreements, a large proportion of users would have no possibility at all. People with very limited pensions can access the facility when they would be unable to pay the full private-sector fee." (Chair)

Around 80% of residents are covered by cooperation agreements and therefore pay fees calculated according to income and household circumstances. Residents outside these agreements pay the institution's maximum monthly fee, approximately €1 680 in 2025. Social Security provides an additional monthly amount of €150 for each resident with dementia or Alzheimer's disease. The chair noted that resident fees were increasing faster than pensions and that families were finding it increasingly difficult to pay.

Expenditure

The three largest expenditure categories are personnel, food and maintenance. Personnel costs are by far the largest and have increased substantially over the previous five years, partly because increases in the statutory minimum wage affect the wider pay structure. The cost burden is also influenced by the fact that around 80% of residents are dependent and by a management decision to employ more staff than the legal minimum.

The building is leased to the social cooperative by the parent housing cooperative at €3000 per month, less than one third of the amount the chair considered to be the market value. Catering is outsourced to a company that prepares meals on the premises with its own staff and ingredients. The ERPI remains responsible for maintenance and pays a price per meal. Outsourcing was regarded as advantageous because it reduces the burden of managing purchasing and supplies.

Financial Balance

Financial balance was a recurring theme throughout the interview. The chair stressed that the organization does not seek profit but cannot operate at a loss, must pay all obligations on time and has no debts. Although State funding had improved slightly over the previous four or five years and risen somewhat above inflation, it was still considered insufficient.

Decent Work

When asked to define decent work, the chair described work performed in a healthy physical and psychological environment and accompanied by adequate remuneration, while acknowledging that adequacy is relative.

Working Conditions

Residential care is provided 24 hours a day, requiring direct care assistants to work shifts, nights and weekends. The work was described as physically and psychologically demanding, particularly when assisting residents with transfers, personal care and conditions such as Alzheimer's disease.

"It is difficult physically and psychologically. Very difficult physically. Imagine having to move a person weighing 100 kilograms, turn them, put them in a chair or move them to a sofa. And that is without even mentioning the problems associated with illness and Alzheimer's." (Chair)

The chair considered that direct care assistants should be paid more in view of the physical and psychological demands, but argued that institutions lacked the necessary resources unless the State provided additional funding. Management recognized employee exhaustion and burnout. The high proportion of dependent residents, approximately 80%, also increases staffing needs.

Pay

The institution pays the remuneration required by law and offers only limited additional benefits. Management acknowledged that wages were low and stated repeatedly that it would like to pay more but lacked the financial capacity to do so. When asked whether wages were sufficient to meet housing and family needs, the chair replied that they were “far too low”. Salary attachment orders received by the institution were cited as indirect evidence that some employees experienced financial hardship, with one or two cases occurring in most years.

Health Protection and Physical Safety

Health protection is limited to statutory occupational health provision and compulsory workplace accident insurance. The institution contracts an occupational health company that periodically assesses employees. Following occupational health recommendations, the ERPI has two lifting devices for residents. However, workers sometimes avoid using them because they take longer, choosing manual handling despite the risk of back injury.

Training

The cooperative attaches importance to training. The technical director joined one year before the ERPI opened and completed paid placements in other residential facilities. Training priorities are selected annually by the technical director in accordance with legal requirements.

New employees receive on-the-job training for at least three weeks. They accompany a more experienced colleague across morning, afternoon and night shifts and follow service protocols for each floor, which are organized according to residents’ levels of dependency. This provides practical, task-specific learning.

Main Organizational Challenges

The institution’s main challenges are funding, recruitment, retention and absenteeism. Rising personnel costs make funding a serious concern. Absenteeism creates significant difficulties for scheduling, especially when employees notify the organization shortly before the start of an early shift.

Recruitment Difficulties

Recruitment was described as extremely difficult. Whereas the institution initially received queues of applicants, few candidates now apply and some reject the requirement to work shifts. A shortage of available Portuguese workers has led the institution to recruit migrants. The chair argued that recent current immigration rules may create an additional obstacle because an employment contract can only be concluded with a migrant who already holds the required residence documentation, while obtaining that documentation may depend on having employment.

HRM Practices the Institution Would Like to Implement

The institution would like to increase wages but considers this financially unviable without additional public funding. Increasing residents’ fees was not viewed as sustainable because fees were already rising faster than pensions. Management therefore regarded greater State participation as necessary.

The cooperative would also like to provide more training, but staffing constraints make it difficult to release employees during working time. Training hours reduce time available for direct care, while residents continue to require assistance. This creates a practical conflict between legal and organizational aspirations for training and the continuous staffing requirements of residential care.

Conclusion

The social solidarity cooperative examined in this study emerged from the housing cooperative movement and from four decades of experience in non-profit private-sector cooperation. It was created both to respond to population ageing through an ERPI and to meet an institutional requirement: establishing an entity equivalent to an IPSS that could enter cooperation agreements with the State. The cooperative legal form was therefore not only an identity-based choice; it was also a condition for the financial viability of the ERPI and access to State funding.

The SSC was created to meet a community need for residential care for elderly people. This supports Meira's (2018) argument that social solidarity cooperatives pursue altruistic and solidarity-based purposes directed towards community needs, even though this orientation differs from the traditional cooperative emphasis on satisfying members' needs.

The ERPI's chair repeatedly emphasized the importance of financial balance and described the tension between funding sources and institutional needs as a "straitjacket". Financial constraints limit the institution's capacity to raise wages, recruit additional staff and provide more training without jeopardising viability. Since further increases in resident and family contributions were not considered feasible, increased State funding was presented as the principal solution.

Employees are the institution's main asset and the central element of service delivery, but paradoxically also a major vulnerability. Recruitment and retention are difficult and may be further complicated by recent immigration rules. Elder care must be provided continuously, 24 hours a day and seven days a week, through shift and weekend work. The findings corroborate the literature: wages are low, physical and psychological demands are high, approximately 80% of residents are dependent and absenteeism is recurrent. Labour law plays a fundamental role because the institution generally provides only the protections legally required, although it employs more staff than the regulatory minimum.

The decent work analysis reveals high physical and psychological demands among direct care assistants, reflected in exhaustion and burnout. Although the cooperative complies with statutory requirements and provides induction, training and supervision, limitations persist in remuneration, health protection, safety and work-life balance. These constraints are closely linked to funding, absenteeism and recruitment difficulties. The findings support the JD-R model, according to which an imbalance between demands and resources can undermine employee well-being (Bakker & Demerouti, 2007), and they align with the quality-of-working-life dimensions proposed by Grote and Guest (2017). These dimensions require effectively implementing the five mutually reinforcing sets of HRM practices oriented towards mutual gains: development of human capabilities; fair rewards and employment security; occupational health, safety and well-being; social integration and employee participation; and work-life balance and flexible working. Such sets of practices can improve employee well-being, care quality, recruitment and retention, and organisational sustainability.

The case raises a broader question about whether mutual gains are implemented in cooperative organisations which, by definition, should provide favourable conditions for quality of working life. The cooperative's management is strongly shaped by the funding model and regulatory framework. The State influences not only residents' access to the ERPI, but also, indirectly, pay, team composition and working conditions. Public funding should therefore be analysed as an instrument for promoting decent work, rather than solely as a mechanism for sharing the cost of social provision.

Future Research

Future research should examine why elder care became an area of activity for social solidarity cooperatives; whether cooperative status effectively contributes to better employment conditions; and how the State, through regulation and funding, influences ERPI service quality, employee remuneration and working conditions.

Limitations

The study is based on a single interview with the institution's management. It therefore does not capture the perspectives of employees who deliver care and support services.

Keywords: Residential care facilities for elderly people (ERPI); Decent work; Human resource management; Social solidarity cooperatives; Cooperation agreements

Theme(s): Cooperative Governance and Management; Public Policy and Institutional Support for Cooperatives

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Decree-Law No. 120/2015 of 30 June. Establishes the guiding principles and framework for cooperation between the State and entities in the social and solidarity sector.

Ministerial Order No. 349/2023 of 13 November. Amends Ministerial Order No. 67/2012 and defines the organisational, operational and installation requirements for residential care facilities for elderly people.

Ministerial Order No. 218-D/2019 of 15 July. Amends the specific cooperation model between the Social Security Institute and IPSSs or legally equivalent institutions.

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From Reporting to Governance: Collective Appropriation in Worker Cooperatives

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Abstract

Background

Worker cooperatives are widely recognised as organisations whose democratic governance, collective ownership and territorial embeddedness naturally embody the principles of sustainable development. Their institutional model has long been regarded as intrinsically aligned with corporate social responsibility (CSR), making sustainability less a matter of formal demonstration than an expression of cooperative identity. However, the rapid institutionalisation of sustainability reporting is profoundly transforming this assumption. The Corporate Sustainability Reporting Directive (CSRD), the European Sustainability Reporting Standards (ESRS), the Voluntary Sustainability Reporting Standard for non-listed SMEs (VSME) and the diffusion of sustainability certification schemes increasingly require organisations to measure, document and demonstrate what was previously considered inherent to their governance model. Although these requirements primarily target large companies, they progressively reshape the environment of worker cooperatives through supply chains, public procurement, financial institutions and voluntary certification. Consequently, cooperatives are no longer expected merely to embody sustainability; they are increasingly expected to make it measurable and accountable. This evolution raises a broader theoretical question for cooperative studies: how does democratic governance transform externally designed reporting instruments into resources for collective governance?

While sustainability accounting research has extensively examined reporting frameworks and non-financial performance measurement (Adams, 2015; Capron & Quairel-Lanoizelée, 2016), and cooperative scholarship has highlighted the distinctive institutional characteristics of democratic enterprises (Birchall, 2011; Desroche, 1976; Cariou, 2021), relatively little attention has been devoted to the organisational processes through which cooperatives appropriate externally designed management instruments. Existing research generally treats sustainability indicators as tools for transparency, accountability and compliance. Such perspectives overlook the organisational work required for these indicators to become meaningful in collective action. Drawing on pragmatic approaches to management instruments (de Vaujany, 2006; Lorino, 2018), this paper argues that governance capacity is not embedded within sustainability indicators themselves. Rather, it emerges through a Reporting-to-Governance Process, whereby indicators are progressively interpreted, discussed and reconfigured through democratic deliberation until they become resources supporting collective strategic action.

Methods

The paper investigates this process through a longitudinal qualitative study conducted within seven French worker cooperatives operating in the construction sector. This context is particularly relevant because firms simultaneously face ecological transition, occupational safety challenges, labour shortages, increasing client expectations and growing sustainability requirements associated with certification and public procurement. All participating cooperatives were engaged in AFNOR Certification's Engagé RSE programme. The empirical material combines two waves of semi-structured interviews conducted in 2024 and 2026 with managers and CSR coordinators, complemented by an interview with the Secretary General of the regional Federation of Construction Worker Cooperatives. Overall, thirteen interviews were carried out. The research also adopts a research-intervention perspective, the author simultaneously acting as a

management control advisor within the federation, thereby providing privileged access to organisational practices while enabling continuous dialogue between empirical observations and theoretical interpretation. Data were analysed through an inductive process inspired by Gioia et al. (2013).

Results

The findings reveal a three-stage process through which sustainability indicators progressively acquire governance capacity. During the first stage, indicators are introduced primarily as reporting artefacts responding to external institutional pressures associated with certification, customer expectations and emerging sustainability regulations. Their role remains largely administrative and oriented towards demonstrating compliance. During the second stage, indicators become objects of collective interpretation. Managers, supervisors and worker-members progressively use them to discuss priorities, negotiate trade-offs and construct a shared understanding of sustainability within the cooperative. Rather than measuring predefined objectives, indicators contribute to defining what should count as organisational performance. Finally, during the third stage, sustainability indicators become governance resources. They support democratic deliberation, facilitate coordination between economic, social and environmental objectives and contribute to organisational learning by structuring strategic conversations rather than simply documenting performance.

The analysis demonstrates that this transformation depends less on the technical sophistication of indicators than on the democratic processes through which they are collectively appropriated. Most cooperatives already possess substantial information regarding occupational health and safety, training, responsible purchasing, greenhouse gas emissions and employee participation. The critical issue is therefore not data production but collective interpretation. Sustainability indicators acquire organisational relevance because they provide shared reference points enabling actors to debate priorities, coordinate action and continuously reinterpret the cooperative project. Where democratic deliberation remains limited, indicators retain a predominantly reporting function. Where participatory governance actively engages with them, they evolve into genuine governance devices supporting collective decision-making.

The longitudinal perspective further highlights the contingent nature of this transformation. Economic difficulties experienced by several cooperatives between the two waves of fieldwork temporarily shifted attention from sustainability initiatives towards short-term operational priorities. Governance capacity therefore appears neither as an intrinsic property of sustainability indicators nor as a direct consequence of cooperative status. Instead, it constitutes an organisational accomplishment continuously enacted through democratic interaction, collective learning and strategic negotiation.

Contributions and Implications

This study contributes to cooperative research in three ways. First, it nuances the widespread assumption that democratic ownership alone guarantees sustainable governance by demonstrating that cooperative values require complementary management practices to become operational. Second, it shows that sustainability reporting should not necessarily be interpreted as an external bureaucratic constraint imposed upon cooperatives. Through collective appropriation, reporting instruments may instead reinforce democratic governance by enriching deliberation, strengthening participation and supporting strategic coordination. Third, the paper develops a Reporting-to-Governance Process explaining how management instruments progressively acquire governance capacity within democratic organisations. Rather than opposing cooperative values and managerial technologies, the findings suggest that worker cooperatives distinguish themselves through their capacity to reinterpret externally designed reporting instruments according to their own collective purposes. More broadly, the paper argues that the future of sustainability governance in cooperatives depends less on producing additional indicators than on strengthening the democratic processes through which these indicators become collectively meaningful.

Keywords: Worker cooperatives; Democratic governance; Sustainability indicators; Collective appropriation; Management control

Theme(s): Cooperative Governance and Management; Measuring Impact and Performance of Cooperatives

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Decoding Cooperative Democracy: A Systematic Literature Review of Member Control

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Abstract

Democratic member control is a defining characteristic of cooperative organizations. Members are simultaneously users, owners, and ultimately those to whom control rights are assigned. However, as cooperatives grow and become more complex, direct participation in organizational decision-making may become more difficult, and authority may increasingly be delegated to elected representatives and professional managers. This creates a central governance problem: how can members maintain control over their cooperative when decision-making authority is delegated? This question becomes particularly relevant because ownership in cooperatives involves not only rights to residual returns but also residual control rights, including rights associated with decision management and decision control (Fama & Jensen, 1983; Hansmann, 1996; Chaddad & Cook, 2004). Different cooperative ownership and governance arrangements may allocate these rights differently, generating alternative ways of organizing member control. This study examines how member control is structured and exercised in contemporary cooperatives through a systematic literature review focused on agricultural cooperatives and credit unions. More specifically, we investigate four interrelated dimensions of member control: governance structures and models; election and representation processes; monitoring and incentive mechanisms; and the distribution and potential overlap of functions between elected representatives and professional managers. Rather than treating these dimensions independently, we use them to investigate the broader question of how members maintain control as cooperatives grow and become more complex. The systematic literature review was conducted using Scopus and Web of Science. Searches were performed in July 2025 using combinations of cooperative- and governance-related terms covering ownership and property rights, organizational structures, boards, representation, monitoring, incentives, decision-making, authority, and control. The initial searches returned 2,304 records from Scopus and 1,173 from Web of Science. After removing 923 duplicates, 2,554 studies remained for screening. Following title, abstract, and keyword screening, 144 potentially relevant studies were subjected to full-text analysis. The final sample comprised 40 studies addressing at least one dimension of member control. The findings first show that member control can be organized through different ownership and governance arrangements. The ownership typologies identified in the literature differ in the configuration of members' property rights, while governance models differ in how decision management and decision control are allocated among the general assembly, boards, supervisory bodies, and professional managers (Chaddad & Cook, 2004; Chaddad & Iliopoulos, 2013). The literature identifies different governance models, including traditional, extended traditional, managerial, and corporate arrangements, which differ particularly in the allocation of decision functions between elected representatives and professional managers (Bijman et al., 2013; Chaddad & Iliopoulos, 2013). These arrangements indicate that there is no single organizational configuration through which member control is exercised. Rather, different combinations of rights and governance structures formally organize the relationships among members, elected representatives, and managers. Second, the analysis of election and representation processes shows that delegation to elected representatives does not necessarily imply the relinquishment of member control. Member control may operate before, during, and after elections. Our analysis identifies a process involving members' willingness to assume representative roles, the identification and nomination of candidates, election procedures, representative structures, and subsequent monitoring and accountability. Social networks may influence members' willingness to assume elected positions (Morfi et al., 2020), while nomination and selection procedures

shape how potential candidates are identified and evaluated before formal elections (Huhtala et al., 2020). Thus, democratic control cannot be reduced to voting alone; it also depends on the processes through which representation is constructed and exercised. Third, the literature identifies several mechanisms through which members and their representatives monitor delegated authority. These include supervisory bodies, board procedures, internal and external audits, communication and information mechanisms, the competencies of those responsible for monitoring, and informal relationships. The effectiveness of formal monitoring arrangements therefore depends not only on their existence but also on the conditions under which they are used. Access to information, relevant competencies, independence, monitoring costs, and individual incentives can affect the ability and willingness of members and elected representatives to exercise control. Informal relationships, including trust, reputation, and social relationships, may also interact with formal governance mechanisms. Incentives, however, received comparatively less attention than monitoring mechanisms in the reviewed literature. Finally, the analysis of board–executive relationships shows that formal organizational positions do not necessarily reveal how decision-making authority is actually distributed. Although decision management and decision control may be formally assigned to different actors, elected representatives may participate in managerial decisions, while interaction and coordination between elected representatives and managers do not necessarily constitute role overlap. This finding draws attention to the distinction between formal and real authority (Aghion & Tirole, 1997). The formal allocation of a decision right does not necessarily determine who effectively exercises authority over that decision. This distinction is particularly relevant to cooperatives because formal control rights assigned to members do not, by themselves, ensure their effective exercise. Taken together, our findings indicate that the delegation of authority does not necessarily imply a loss of member control; rather, it changes how such control is exercised. We therefore propose understanding member control as a multidimensional phenomenon resulting from the interaction among the formal allocation of ownership, decision, and control rights; election and representation processes; the actual distribution of authority; and the mechanisms and conditions through which delegated authority is monitored and controlled. This perspective shifts the analysis of cooperative democracy beyond the existence of formal voting rights toward the organizational conditions under which those rights can be effectively exercised. It also suggests that future research should develop multidimensional measures of member control and further investigate how governance arrangements, monitoring mechanisms, incentives, and informal relationships interact as cooperatives become larger and more complex.

Keywords: Member control; Cooperative governance; Decision rights

Theme(s): Cooperative Governance and Management; Public Policy and Institutional Support for Cooperatives

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Understanding Cooperatives as Multi-Actor Ecosystems

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Abstract

Background

Cooperatives differ fundamentally from investorowned firms due to their memberbased ownership and embeddedness in local communities. Traditional cooperative research has examined principles (Waring et al., 2022), values (Beaubien & Rixon, 2012), and philosophical foundations (Pathak & Kumar, 2008), often emphasizing the dual nature of cooperatives as both enterprises and member association. This duality is often referred to as a tension between economic and social logics (Novkovic et al., 2022), and positions cooperatives among hybrid organizations that manage competing institutional pressures (Jäger & Schröer, 2014).

Yet despite this rich tradition, cooperative studies have rarely been explored and conceptualized as multi-actor systems, with subsequent analysis from suitable research streams such as ecosystem theory. Ecosystem perspectives offer a powerful lens for reinterpreting cooperative organization. Rather than viewing cooperatives merely as firms embedded in external networks, ecosystems frame them as dynamic and interdependent constellations of actors, institutions, norms, and resource flows that co-produce value (Şavga, 2024; Theurl, 2024). Originating in strategic management and innovation studies (Jacobides et al., 2018), ecosystem theory emphasizes interdependence, cocreation, shared governance, adaptive capacity, and distributed agency–concepts that map closely onto cooperative structures.

While cooperatives have frequently been studied through lenses such as governance, stakeholder relations, social enterprise, and hybrid organizing, these perspectives often focus on organizational characteristics rather than systemic relationships among actors. Ecosystem theory shifts analytical attention toward interdependencies, complementarities, and collective value creation across multiple actors and levels. This perspective is particularly relevant for cooperatives because member participation, democratic governance, collective ownership, and local embeddedness create forms of coordination that extend beyond conventional firm boundaries. Examining cooperatives as ecosystems therefore offers opportunities not only to reinterpret cooperative organization but also to broaden ecosystem research through the study of mature and enduring collective organizational forms.

This research therefore reconceptualizes the cooperative itself as an ecosystemic entity. Rather than positioning the cooperative within an ecosystem, we analyse the cooperative as a system whose internal organization, governance, and relationships constitute its own ecosystem of interdependent roles, resources, and processes. This shift in perspective foregrounds relationality: governance mechanisms shape patterns of interaction, collective incentives align behaviours across actors, and shared norms stabilize longterm cooperation. Ecosystem theory thus becomes a tool for understanding cooperatives holistically: not as firms but as socioeconomic systems characterized by distributed agency and cocreated value.

Aims

The aim of this paper is to explore how ecosystem theory applies to cooperative organizations and how an ecosystemic lens enriches understandings of cooperative governance, management, and multi-actor value creation. More specifically, the paper investigates whether cooperatives can be conceptualized as ecosystems in their own right and what such a perspective reveals about coordination, governance, resilience, and collective value-creation.

Methods

To examine how the cooperative as ecosystem manifests in practice, we conducted an exploratory qualitative study in the ChampagneArdenne region of France. This region contains more than 19,000 growers and some 130 cooperatives. Between May 2024 and March 2025, we conducted indepth semistructured interviews with CEOs, export directors, and senior managers of eight cooperatives: Champagne Palmer, Champagne Sanger, Champagne Beaumont de Crayeres, Champagne Gratiot Pillière, Champagne Jacquart, Champagne Devaux, Champagne Le Brun de Neuville and Champagne Mailly Grand Cru. The senior management of the cooperatives form suitable informants as they occupy positions that provide a comprehensive overview of the cooperative's internal and external relationships, governance structures, and coordination mechanisms. Through their strategic responsibilities, they are involved in managing interactions among members, customers, suppliers, partner organizations, and other stakeholders, giving them insight into the interdependencies that characterize cooperative activity. Furthermore, their responsibility for strategic development enables them to reflect on how the cooperative adapts to changes in its environment and how relationships with multiple stakeholders contribute to value creation.

All interviews were recorded, transcribed verbatim, and complemented by secondary sources such as websites, brochures, sustainability reports, and historical publications. Using NVivo, we conducted thematic analysis (Clarke & Braun, 2017), coding for (a) cooperative actors and their roles, (b) key activities shaping value creation, (c) perceptions of cocreated value, and (d) interdependencies within and between cooperatives.

Results

The findings reveal that cooperatives function as multi-actor ecosystems in several mutually reinforcing ways. First, interdependencies among growers, managers, employees, distributors, and market partners constitute the structural backbone of the cooperative system. These interdependencies shape coordination routines, quality control processes, and the circulation of knowledge, risks, resources, and value throughout the organization. Second, cooperative governance appears less as administrative oversight and more as ecosystem orchestration, where leaders facilitate alignment among autonomous actors rather than exercising hierarchical control. Third, value creation emerges through complementarities generated by collective action, including joint production, shared branding, investments, knowledge exchange, and long-term relational commitments. Fourth, the cooperative ecosystem continuously adapts to changing market conditions through mechanisms of member participation, collective decision making, and distributed responsibility. Finally, the cooperatives are embedded in the broader Champagne region, creating a nested ecosystem in which internal cooperative dynamics interact with regional institutions, appellation regulations, historical traditions, and global market forces.

Discussion

Viewing cooperatives as ecosystems reveals organizational dynamics often overlooked in traditional cooperative scholarship. The ecosystem lens highlights relational coordination beyond formal governance and illustrates how interdependencies structure decisionmaking and value creation. It shifts attention from balancing economic and social logics to understanding hybrid organizing as systemic negotiation across multiple actors and levels. The Champagne case demonstrates that cooperatives' competitive advantages (resilience, legitimacy, and innovation capacity) arise from their ecosystemic nature. Yet it also shows that ecosystem complexity demands new forms of leadership, orchestration, and adaptive governance, an insight that is valuable for ecosystem scholars. Moreover, cooperatives challenge several assumptions that underpin ecosystem research. Much ecosystem scholarship focuses on emerging, innovation-driven systems characterized by fluid participation and evolving governance structures. Cooperatives, by contrast, represent long-standing institutionalized ecosystems that have developed mechanisms for balancing member autonomy, collective decision making, value distribution, and long-term commitment. They

therefore offer an opportunity to examine how ecosystems can achieve stability, legitimacy, and resilience while maintaining distributed governance.

In fact, ecosystem theory can learn from cooperative organization and governance; ecosystem scholars can examine cooperatives as established examples of ecosystems that have successfully coordinated interdependent actors around shared goals over long periods of time. Cooperatives provide rich empirical settings for studying ecosystem governance, collective value creation, member participation, legitimacy, and resilience, thereby offering insights into how ecosystem actors balance autonomy and coordination while sustaining long-term collective action. As such, cooperatives should be viewed not only as objects of ecosystem analysis but also as important sources of theoretical development for ecosystem research.

Contributions and Implications

This paper contributes in four ways. First, it reconceptualizes cooperatives as ecosystems, extending ecosystem theory into a context that has received limited attention. Second, it demonstrates how ecosystem concepts such as interdependence, orchestration, co-creation, and adaptive governance illustrate key features of cooperative management and governance that remain underexplored in traditional cooperative research. Third, it develops an analytical framework for studying cooperatives as nested and multilayered systems, thereby supporting future empirical research on their structure, dynamics, and evolution. Fourth, it contributes to ecosystem scholarship by identifying cooperatives as enduring ecosystemic forms that provide valuable insights into collective value creation, democratic governance, and resilience. Conceptualizing the cooperative as an ecosystem thus enriches both cooperative studies and ecosystem research by demonstrating how collective ownership and member participation can support long-term coordination among interdependent actors.

Keywords: Cooperative; Cooperative management; Ecosystem; Agricultural cooperatives; Champagne-Ardenne

Theme(s): Cooperative Governance and Management; Emerging Sectors and New Themes

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Governance and compliance in cooperative enterprises: enforcement and accountability in southern Brazil

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Abstract

Background

The growing societal demand for transparency, ethical conduct, and institutional accountability has significantly reshaped governance expectations across organizational forms. This global trend finds resonance in Brazil, where large-scale enforcement operations targeting public and private misconduct have intensified scrutiny over how organizations are governed and controlled. Within this context, cooperative enterprises occupy a distinctive position. Grounded in democratic governance, member participation, and solidarity, cooperatives combine economic relevance with a unique legal and organizational architecture.

In the state of Rio Grande do Sul, cooperatives play a strategic role in sectors such as credit, health, and insurance. However, their horizontal and decentralized structures pose specific challenges to the implementation of corporate governance and compliance mechanisms originally designed for hierarchical, investor-owned firms. The increasing diffusion of Governance, Risk, and Compliance (GRC) frameworks raises critical questions regarding their effectiveness and adaptability within cooperative enterprises.

Aims

Despite the formal adoption of compliance programs and governance codes, there is limited empirical evidence on whether these instruments effectively operate as mechanisms of enforcement and accountability in cooperative contexts. This gap is particularly relevant in jurisdictions where cooperatives are central economic actors and face growing regulatory and reputational risks. Against this backdrop of growing scrutiny and institutional challenges, the present study aims to analyze the effectiveness of compliance programs and cooperative governance practices as instruments of enforcement and accountability in cooperative enterprises located in Rio Grande do Sul, Brazil.

Building on this general aim, the research is structured to address three specific objectives: (i) assess the level of institutionalization of compliance structures across cooperatives of different sizes; (ii) examine how governance mechanisms are adapted to cooperative legal and organizational specificities; and (iii) identify potential gaps between formal adherence to integrity standards and their practical effectiveness.

The central hypothesis is that, although formal compliance adoption has expanded, a persistent gap remains between ethical discourse and the effective operation of enforcement and accountability mechanisms, especially in decentralized cooperative structures.

Methods

The study adopts an exploratory and descriptive research design, using a mixed-methods approach with a qualitative emphasis. Data were collected between 2024 and 2025 within an academic research project conducted at the Escola Superior do Cooperativismo (ESCOOP).

The sample includes major cooperative enterprises in Rio Grande do Sul, selected based on turnover and workforce size. To capture the complexity of governance and compliance practices, data collection involved four complementary strategies:

- (a) documentary analysis of codes of ethics, compliance policies, internal regulations, and institutional reports;
- (b) structured questionnaires designed to identify integrity and compliance indicators;

- (c) semi-structured interviews with managers, board members, and compliance officers; and
- (d) comparative analysis of cooperatives affiliated with federated systems, particularly Sicredi and Unimed.

Data were analyzed through qualitative content analysis and descriptive statistics, enabling methodological triangulation and increased analytical robustness.

Results

The findings indicate a gradual institutional maturation of integrity practices within cooperative enterprises. Most cooperatives analyzed have adopted formal codes of ethics or conduct, frequently made publicly available, and have established whistleblowing channels, highlighting the growing relevance of the detection function of compliance.

Larger cooperatives demonstrate higher levels of compliance institutionalization, including formally structured programs and designated compliance officers or committees. In these cases, governance mechanisms tend to be more closely aligned with internal control and risk management practices.

However, significant challenges persist. Ethical values such as integrity and sustainability are not consistently embedded in institutional identities, particularly among smaller cooperatives. Compliance structures are less prevalent in these organizations, often due to perceptions of excessive bureaucracy. Moreover, notable heterogeneity exists among cooperatives within the same federated systems, hindering the consolidation of a shared ethical culture and standardized accountability processes.

Discussion

The results reinforce existing literature emphasizing that cooperative governance requires tailored institutional solutions rather than direct transposition of corporate compliance models. The cooperative legal framework—characterized by democratic decision-making and collective ownership—demands governance and compliance arrangements sensitive to these structural features.

The observed correlation between organizational size and compliance maturity suggests that exposure to regulatory and reputational risks acts as a driver for integrity mechanisms. Nonetheless, this dynamic raises concerns about treating compliance as scale-dependent, potentially contradicting cooperative principles that emphasize universal ethical commitments.

Effective enforcement in cooperatives appears to rely less on formal documentation and more on the integration of compliance as a cultural, preventive, and educational practice embedded in governance bodies and collective decision-making processes.

Contributions and Implications

This study contributes to cooperative law and governance scholarship by integrating compliance and accountability into the analytical framework of cooperative enterprises. It advances theoretical understanding by demonstrating the limits of conventional enforcement models in horizontally structured organizations and by emphasizing the centrality of the detection function of compliance for cooperative accountability.

From a practical perspective, the findings offer guidance for cooperative leaders and policymakers in designing integrity frameworks aligned with cooperative principles. Such recommendations are not only relevant for Rio Grande do Sul but may also inform broader debates on cooperative governance in other jurisdictions facing similar regulatory and reputational pressures. Strengthening whistleblowing mechanisms, ethics committees, and participatory oversight structures emerges as a key strategy for enhancing accountability.

Considering the objectives outlined at the beginning of this research, the study underscores that integrity is not merely a function of organizational scale but a foundational value of the cooperative model. By aligning governance practices with cooperative identity, compliance can serve as a legitimate and effective tool for

institutional accountability, thereby fulfilling the central aim of assessing how enforcement and accountability mechanisms operate within cooperative enterprises.

Keywords: Corporate governance; compliance; cooperative law; cooperative societies; Brazil

Theme(s): Cooperative Governance and Management; Cooperative Law

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Managerial Sensemaking of the Member Community Role in Cooperatives

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Abstract

Background

Co-operatives are commonly defined by their dual nature as both market-oriented enterprises and member-based associations. While this duality has been extensively theorized, less is known about how cooperative leaders interpret and enact the member community role in practice. The research questions are: *How do cooperative leaders make sense of the member community role in their organizations? Which theoretically central dimensions of the member community role are emphasized, transformed, or marginalized in managerial discourse? How is democratic member control understood and enacted as part of the member community role?*

Aims and Methods

Drawing on qualitative interview data with operational and governance-level leaders from large Finnish cooperatives, this study examines managerial sensemaking of the member-community role within the context of cooperative duality.

Results

The findings show that although leaders widely acknowledge the dual nature of cooperatives, the member-community role is frequently rendered ambiguous, instrumentalized, or displaced by business-oriented logics. Theoretically central dimensions of the member-community role, such as collective purpose, democratic agency, and member-driven community, are notably weakened in managerial discourse. Democracy, in particular, appears as a formal governance structure rather than a participatory practice.

Contributions and Implications

The study contributes to cooperative theory by showing how the member-community role is narrowed through managerial interpretations, resulting in an imbalanced enactment of cooperative duality.

Keywords: Co-operatives; Co-operative Dual Nature; Member-community role

Theme(s): Cooperative Governance and Management

Development and validation of a common cooperative identity metric across different branches of cooperativism

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Abstract

Background: Cooperative identity is one of the defining features of cooperatives, as it brings together the values, principles, governance practices, and collective commitments that distinguish this organizational model from other forms of enterprise. Although cooperative principles are universal in scope, their practical expression varies across sectors, institutional settings, and organizational realities. This diversity makes it particularly challenging to design instruments capable of measuring, in a consistent, comparable, and applicable way, the extent to which cooperatives embody their identity in practice. In Brazil, the absence of a validated cross-sector metric has limited both the advancement of research and the design of strategies aimed at strengthening governance, education, institutional development, and performance monitoring within the cooperative sector. In this context, the development of a common metric for cooperative identity is relevant not only from an academic perspective, but also for management and policy design. **Aims:** This study aimed to develop and validate a cooperative identity metric applicable across different branches of cooperativism. More specifically, it sought to identify the core dimensions of cooperative identity from the perspective of strategic actors in the sector, validate representative indicators of this construct, and test the consistency and adequacy of the resulting instrument. **Methods:** The research was conducted in three complementary stages. First, five focus groups were carried out with strategic audiences in the cooperative sector, including cooperative agents and leaders from different branches. The empirical material was analysed through content analysis supported by ATLAS.ti software, which enabled the identification of typical statements and emergent analytical categories related to cooperative identity. In the second stage, the fuzzy Delphi technique was applied with the participation of 22 specialists, including both academics and professionals working in cooperativism, in order to validate and select the most representative indicators for the instrument. From an initial set of 93 indicators, 39 were retained. In the third stage, the questionnaire was submitted to Exploratory Factor Analysis, resulting in a final version composed of 32 items distributed across five dimensions. Reliability statistics reached acceptable levels, indicating internal consistency and the adequacy of the instrument to measure the proposed construct. **Results:** The findings demonstrate the feasibility of operationalising cooperative identity through a multidimensional metric that is empirically validated and applicable across different branches of cooperativism. The combination of qualitative exploration, expert validation, and statistical refinement made it possible to translate a broad and normative construct into a concise and reliable instrument. The final metric, consisting of 32 items organised into five dimensions, showed satisfactory psychometric performance. Reliability indicators confirmed that the instrument is suitable for measuring the construct it was designed to assess, thus reinforcing its methodological robustness. Beyond its academic consistency, the metric also showed practical and institutional relevance. The instrument was accepted by Sescoop Nacional (National Service for Cooperative Learning) and implemented across all Brazilian states in order to assess the level of cooperative identity in cooperatives nationwide. Its adoption on a national scale reinforces its legitimacy, applicability, and capacity to generate strategic information for strengthening cooperativism. **Discussion:** This study contributes to the debate on cooperative identity by demonstrating that it can be understood not only as a normative or symbolic reference, but also as an organisational phenomenon that can be systematically measured. By proposing a common metric across different branches, the research addresses a recurring challenge in cooperative studies: acknowledging sectoral diversity while preserving the notion of a shared identity grounded in universal cooperative principles and values. The findings suggest that measuring cooperative identity can support diagnostic

processes, cooperative education, governance improvement, and strategic alignment within cooperatives. At the same time, the Brazilian experience indicates that such an instrument can extend beyond academic use and acquire institutional relevance by informing sector development initiatives. Although the metric was developed and validated in Brazil, its grounding in universal cooperative principles suggests potential for adaptation in other countries. However, future international applications should take into account cultural, regulatory, and market specificities. **Contributions and Implications:** This research offers three main contributions. First, it addresses a methodological gap by providing a validated instrument for measuring cooperative identity across different branches. Second, it highlights the value of combining qualitative and quantitative methods in the development of scales within cooperative studies. Third, it offers practical value for cooperatives, representative organizations, and policymakers by enabling diagnosis, comparison, and monitoring of identity-related dimensions. The implications of the study are especially relevant for cooperative education, governance strengthening, strategic management, and policy design aimed at supporting the sector. The adoption of the metric by SESCOOP Nacional indicates its capacity for large-scale use. In addition, the instrument holds potential for international adaptation, provided that future applications take into consideration the particularities of the contexts in which it may be implemented.

Keywords: Cooperative identity; Cooperatives; Metric development

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Risk Management Maturity: An Evaluation Model for Cooperatives

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Abstract

Background

Cooperatives play a vital role in risk management within their supply chains and among their producers, and this tool can significantly distinguish their activities, supporting their longevity and the achievement of their goals (Oliveira & Wander, 2022). Like other organisations, cooperative societies have levels of risk appetite and tolerance, along with a structure that influences their maturity in management, governance, and risk.

Currently, there are mechanisms for evaluating the risk maturity level of organisations through models. This evaluation provides a diagnosis to pinpoint strengths and weaknesses regarding risk, as well as identifying areas needing development to improve maturity levels (AON, 2017; Instituto Brasileiro de Governança Corporativa [IBGC], 2017; Risk and Insurance Management Society [RIMS], 2022). In supply chains, maturity models are used to diagnose vulnerabilities and develop strategies to manage operational risks.

Aims

The overall aim of this study was to propose a model for evaluating risk management maturity in cooperatives. Specifically, this research aims: a) to identify which characteristics of cooperatives may act as sources of risk for this type of organisation; b) to develop a risk management maturity assessment model tailored for cooperatives; and c) to validate the model within a cooperative.

Methods

The data for this research were collected through an in-depth study, including a systematic literature review (SLR) in academic databases to understand and compare how maturity models are constructed and the existing risk management maturity models, followed by proposing a model for cooperatives. After data collection, interviews with experts were conducted to validate the proposed maturity model, using content analysis as proposed by Bardin (2013), which involves interpreting the textual content for coding and categorisation.

Results

The result was the development of a risk management maturity model for cooperatives, considering the attributes of Risk Management Processes, Risk Management Culture, Governance, Information Technology, and Cooperativism. Concerning the maturity levels, five levels were chosen for each attribute: Initial, Organised, Defined, Consolidated, and Advanced, each representing a stage in the maturity development.

Discussion

The analysis of risk management maturity in the surveyed cooperatives exposes a gap between managers' theoretical perception and the actual implementation of practices. As Oliva (2016) notes, maturity involves a thorough analysis of formal mechanisms; however, the findings indicate that, although employees largely understand the topic cognitively, a gap persists in the standardisation of assessment models. This lack of formalisation implies that risk management, in many cases, still occurs without a systematic approach, lacking guidelines and procedures that support a robust and replicable organisational structure.

Regarding risk culture, the results support the guidelines of the International Organization for Standardization, demonstrating that value protection is fundamentally linked to human factors. The role of top management is significant as the tone at the top, acting as the driving force behind risk perception to influence all levels of the organisation. However, this governance faces challenges related to structural independence.

The composition of boards by members of the cooperative itself, as mandated by Brazilian Co-operative Law No. 5,764 (1971), presents the challenge of multiple roles played by board members. This situation requires that maturity models for cooperatives include specific control mechanisms to reduce the conflicts of interest inherent in this legal and institutional setup.

Furthermore, the purely cooperative aspect of the risk management model revealed key points of theoretical and operational tension. Phenomena such as the “horizon problem” and the “free-rider cooperative” emerged as latent risks affecting efficiency and long-term technological investment capacity.

Finally, the literature review showed that aspects of cooperativism are interconnected and that greater maturity in risk management aids in achieving goals, enabling these organisations to be better prepared and respond appropriately to the organisation's appetite. For cooperatives, where the debate on risks remains limited, it becomes crucial to conduct a comprehensive assessment that considers not only the risks faced by other types of organisations but also those arising from their unique corporate structure.

Keywords: Cooperativism; Risk Management; Maturity model

Theme(s): Cooperative Governance and Management

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Measuring the concentration rate of cooperatives in Spain

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Abstract

Background

Cooperative enterprises, consistent with their foundational principles, have long demonstrated a strong commitment to conducting their activities in accordance with sustainability criteria and with deep social and territorial engagement (Candemir et al. 2021; Sánchez-Navarro et al. 2024). At the same time, they recognize that achieving these goals requires continuous improvement in their competitiveness to ensure sufficient profitability. However, this would undermine their long-term sustainability, which must necessarily be achieved simultaneously in economic, social, and environmental terms.

Among the key factors driving greater competitiveness in cooperative enterprises, organizational scale is one of the most decisive. A larger scale not only enhances competitiveness directly but also strengthens other critical capabilities such as innovation, diversification, internationalization, and the training and professional development of managerial staff (Juliá et al. 2012; Meliá & Martínez-García 2015; Bijman & Iliopoulos 2014). The example set by leading European cooperative firms in this area has prompted numerous Spanish cooperatives across sectors and regions to undertake various forms of business consolidation.

Aims

This study aims to quantify concentration rates among Spanish cooperative enterprises. The analysis will be structured into three parts using data from the past 25 years. First, we describe concentration rates among cooperatives through a national-level assessment. Second, we disaggregate the analysis to examine regional patterns. Finally, we consider sector-specific dynamics by computing concentration rates for cooperatives based on their main activities. Estimating concentration rates provides a more precise understanding of how consolidation processes unfold across territories and activities.

Methods

We measure the rate of cooperative concentration by examining the gap between the rate of change in the number of cooperative firms and the rate of change in the employment they generate. The methodological premise is that concentration occurs when the number of firms declines while employment continues to expand or remains stable, indicating that activity is being absorbed by fewer cooperative units. By quantifying the magnitude and direction of this gap, the analysis captures the intensity of consolidation processes: the larger the positive differential in favor of employment, the higher the inferred rate of concentration within the cooperative sector.

We apply the same methods to disaggregated data to examine both regional patterns and differences among activities. This multiscale approach will help identify structural differences and clusters of territories and activities shaping cooperative consolidation. Our results show a clear linear increase in the concentration rate at the national level over the past 25 years. In other words, the consolidation process has not only preserved the concentration rate but also steadily accelerated it during the period analyzed. In terms of regional differences, we find clusters of regions with high concentration rates, such as Andalucia, the Valencian Region, and Murcia, and others with low or even negative rates, such as the Basque Country

and Galicia. In terms of activities, we find that agrifood and consumer cooperatives present the highest rates, while worker and commercial cooperatives present the lowest.

Results

The results highlight several important dynamics. The gap-based indicator captures not only whether cooperatives are consolidating but also the intensity of this process. Indeed, the concentration metric effectively captures how consolidation intensifies when employment grows faster than the number of firms, revealing a structural and sustained trend. The steady national acceleration suggests that cooperative consolidation has become a long-term transformation rather than a cyclical adjustment. Regional heterogeneity points to distinct institutional, sectoral, and territorial conditions shaping these processes, with clear clusters of high and low concentration rates. Sectoral differences further indicate that consolidation is driven by varying competitive pressures, technological requirements, and market structures across cooperative activities.

Contributions and Implications

Three main contributions emerge from our study. Firstly, we propose a novel dynamic indicator of cooperative concentration. The gap between firm variation and employment variation provides an original, temporally sensitive measure that captures not only whether consolidation occurs but also its intensity and direction over time. Secondly, we provide evidence of a long-term, accelerating trend of national consolidation. The linear increase in concentration over 25 years demonstrates that cooperative consolidation in Spain is structural, persistent, and progressively intensifying. Finally, we identify strong regional and sectoral asymmetries. The detection of high and lowconcentration clusters across territories and activities reveals that consolidation is shaped by heterogeneous institutional, economic, and sectoral conditions.

In summary, the suggested concentration rate indicator, which measures the gap between the rate of change in the number of cooperative firms and in employment growth, offers a novel tool for quantifying the intensity and direction of business consolidation. For economic analysts, these metrics provide evidence-based insights into how organizational scale influences competitiveness, facilitating strategic decisions regarding innovation, diversification, and internationalization. By monitoring the magnitude of this gap, analysts can determine if consolidation processes are due to a structural transformation rather than to temporary cyclical adjustment.

Furthermore, the concentration rate indicators inform decision-makers by identifying significant regional and sectoral asymmetries. The ability to disaggregate data reveals clusters of high-concentration activities, such as agrifood, versus low-concentration sectors like worker cooperatives, highlighting varying competitive pressures and market requirements. Decision-makers can use this information to tailor institutional support and policies to specific territorial needs, such as addressing the low concentration rates found in regions like the Basque Country compared to the high rates in Andalusia. Ultimately, these indicators enable a precise understanding of how activity is being absorbed by fewer units, ensuring that cooperatives maintain the profitability necessary to sustain their social and environmental commitments.

Keywords: Competitiveness; consolidation; employment; cooperatives; size

Theme(s): Cooperative Governance and Management; Measuring Impact and Performance of Cooperatives

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From Purpose to Shared Commitment: A Proposal to Strengthen Legacy in the Social Economy

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Abstract

Purpose

Social economy organizations do not usually fail because they lack values, but because they struggle to translate those values into a shared, stable, and operational orientation for action. Cooperatives and foundations are often born around a social, community-based, or transformative mission. Over time, however, they may experience forms of organizational detachment: weakened sense of belonging, increasing distance between founding values and everyday practices, fragmentation between governing bodies and professional teams, and growing difficulty in sustaining genuinely joint action under conditions of professionalization, regulatory complexity, competition, and generational renewal. In this context, the key question is no longer whether an organization "has" a purpose, but how that purpose can be formalized, coordinated, and made effective in collective action. This is precisely the core concern underlying both the theoretical framework of Zentzua and the case of Laboral Kutxa.

Theoretical Framework

This paper addresses that challenge through the case of Zentzua, developed in Laboral Kutxa, and explores its possible projection toward other social economy entities. The central argument is that Zentzua should not be read merely as a cultural renewal initiative within a cooperative bank, but as an institutional architecture of shared purpose oriented toward strengthening legacy. In the case analyzed, Zentzua is structured around a practical sequence: legacy, identity, integrity, path, methodology, evaluation, and continuity. This sequence makes it possible to transform purpose into an operational guide for organizational life rather than leaving it at the level of symbolic declaration. In other words, Zentzua translates a historically embedded cooperative culture into an explicit management framework capable of guiding both strategic reflection and everyday practice. The Laboral Kutxa case makes clear that this effort is intended to preserve and reactivate cooperative identity in a context marked by digital transformation, regulatory demands, and competitive pressure, without abandoning the organization's social mission or long-term orientation.

The theoretical lens of the paper is primarily drawn from Michael Bratman's planning theory and the literature on shared agency. Rather than interpreting purpose as a simple cultural narrative or an abstract normative statement, planning theory allows it to be understood as a relatively stable structure of intentions, plans, and subplans that organizes action over time, reduces the need to reopen deliberation constantly, and facilitates coordination among actors. Applied to organizations, this means that the value of purpose lies not only in expressing worthy ends, but in being translated into practical commitments, shared expectations, and effective criteria for decision-making. From this perspective, Zentzua can be interpreted as a form of institutional self-governance, capable of sustaining a reflective unity between mission, governance, economic activity, and social responsibility.

This reading becomes even more robust when Bratman's later work on shared and institutional agency is incorporated. An organization does not act jointly simply because its members hold common values in the abstract, but because they are able to articulate mutually adjusted orientations, compatible subplans, recognizable procedures, and distributed responsibilities. From this standpoint, organizational detachment can be reformulated as a problem of a deficit in the shared planning of purpose. It is not merely a matter of

declining emotional commitment or cultural erosion, but of a growing disconnection between identity, coordination, and decision. When purpose is not institutionalized, it remains rhetorical. When it is institutionalized, it becomes a mediating structure between historical legacy, present governance, and future orientation. Zentzua is relevant precisely because it allows us to observe how a cooperative organization attempts to transform a meaningful orientation into a practical architecture of shared action.

Proposal

Building on this framework, the paper takes a further step and suggests the analytical transferability of the model to other social economy organizations, including non-financial cooperatives and foundations. The claim is not that all such organizations should replicate Laboral Kutxa's experience mechanically, but that they may benefit from a similar logic: turning purpose into institutional infrastructure. This is especially relevant for organizations with strong moral and social density that are nonetheless exposed to pressures of scale, professionalization, and stakeholder plurality, as may be the case for organizations such as Lantegi Batuak. In these settings, strengthening legacy should not be understood merely as reaffirming mission statements, but as designing mechanisms that translate mission into effective coordination, organizational intelligibility, evaluative criteria, and intergenerational continuity. Legacy, in this sense, ceases to be a narrative about the past and becomes an active principle of institutional governance. The Laboral Kutxa material itself suggests that Zentzua may inspire other cooperatives within the widerondragon ecosystem, which reinforces its relevance as a transferable framework rather than a single isolated case.

Contribution

The contribution of the paper is twofold. Theoretically, it connects the literature on organizational purpose with the theory of action, shared agency, and institutional agency. Practically, it offers a useful framework for cooperatives and foundations seeking to renew their identity without falling either into nostalgia or into the banalization of values through purely rhetorical discourse. The core idea is simple but demanding: in the social economy, strengthening legacy depends not only on remembering where an organization comes from, but on building institutional devices that enable people to act together toward where the organization wants to go. That movemen, from declared purpose to shared commitment, is what Zentzua helps us to conceptualize with particular clarity.

Keywords: Organizational purpose; shared agency; legacy; social economy; Zentzua

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Work Perception in CSX Companies: A Comparative Study of Job Satisfaction

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Abstract

The United Nations Sustainable Development Goals (SDGs), also known as Agenda 2030, were adopted in 2015. The current report for 2024 makes it clear that less than 20% of the goals are likely to be achieved by the target year of 2030. In addition, there are conflicting goals between the intention to pursue economic growth based on an increase in gross domestic product per capita, as postulated by Goal 8, on the one hand, and goals such as achieving sustainable consumption and production patterns (Goal 12) or taking measures to combat climate change and environmental goals, on the other hand (Coscieme et al. 2020; Jensen et al. 2023). To be specific, Goal 6 to ensure availability and sustainable management of water and sanitation for all, Goal 13 to take urgent action to combat climate change and its impacts, Goal 14 to conserve and sustainably use the oceans, as well as Goal 15 to protect, restore, and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and biodiversity loss (Hickel 2019).

Cooperatives are defined as “autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise" (ICA 1995). They can be considered as agents contributing to the achievement of the SDGs (Lafont et al. 2023).

Closely linked to the development of Agenda 2030 for Sustainable Development is the goal of decoupling economic growth from resource and energy consumption. (Fletcher & Rammelt 2017). However, current empirical findings do not support the thesis that green growth is achievable in the foreseeable future, or that this is compatible with the Paris Climate Agreement. (Freire-González et al. 2024; Vogel & Hickel 2023).

A political goal independent of growth, based on a strategy geared toward social equality and sufficiency, is therefore preferable for countries with high average income. (Vogel & Hickel 2023, S. e767, Fraser et al. 2024).

Cooperatives offer a different a different point of view, in contrast to the quest for profit and capital accumulation pursued by corporate business model (Novkovic 2024). To be specific, they are focused on the needs of their members but not on growth (Carini et al. 2024, p. 312). A particular form of cooperatives are the so-called community-managed businesses (CSX). The core idea is to transfer the principles of community-supported agriculture (CSA) to other types of enterprises, such as bakeries or restaurants (Löbbering 2018; Meese 2023; Rommel 2017). They are characterized by pay-as-you-go financing over a set period (Rothamel & Jung-Irrgang 2024).

To date, there has been little research on the extent to which employees of CSX businesses differ from the general population and on how employment in such companies affects subjective well-being, job satisfaction, and locus of control (LOC). Yet examining these aspects could make a decisive contribution to increasing understanding and recognition of such forms of employment within society and politics, as the pilot project on basic income impressively demonstrates (Bohmann et al. 2025).

There is evidence that CSX company members are not representative of the general population. Research by Egli et al. (2023) on CSA companies found that members were predominantly well educated and female, had higher disposable incomes, and tended to hold idealistic attitudes. Surveys conducted by Caspari et al.

(2025) of 72 members from various companies associated with CSX also identified these socio-demographic characteristics.

Studies that explicitly investigate the effects on life or work satisfaction of employees in cooperatives, on the other hand, are rare.

In an analysis of an Italian cross-sectional data set of non-profit cooperatives, Becchetti et al. (2014) found evidence that job satisfaction among employees in cooperatives is higher than in profit-oriented companies. A study by Bruni et al. (2021) found that the proportion of employees in cooperatives in various countries had a positive effect on happiness.

One variable that has a proven influence on job satisfaction in different cultures is LOC (Chen & Silverthorne 2008; Ng et al. 2006; Judge & Bono 2001). This concept describes the personal belief that circumstances depend on one's own decisions and actions (Cobb-Clark 2015). It has been suggested that high internal LOC is an element of the cooperative identity (McMahon & Novkovic 2025).

In our research, we want to address the following questions:

How do employees of CSX companies differ from respondents in the German SOEP?

To what extent does employment in such types of businesses influence autonomy, job satisfaction, and locus of control?

First, we compare the samples and match them according to their company size, age, actual working time, as well as industry occupation. Openness to experience as well as autonomy in occupational activity is significantly higher in employees from CSX companies than in employees from the SOEP. Secondly, a propensity core matching will reveal whether those differences remain significant.

Keywords: Community Supported Economy, Cooperatives, Job Satisfaction, Growth Independence

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Lateral accountability as an identity in hybrid organization: a conceptual Framework

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Abstract

This paper revisits and extends the forms of nonprofit accountability developed by Najam (1996), with a focus on the under-theorized lateral dimension—the internal accountability among peers, staff, and organizational members. It aims to conceptualize how lateral accountability operates as a social and relational process through which nonprofit organizations negotiate values, identity, and legitimacy (Roberts, 1991; Ebrahim, 2003; Unerman & O'Dwyer, 2006).

The paper is conceptual and builds on organizational identity theory (Gioia, Schultz & Corley, 2000; Gioia, Patvardhan, Hamilton & Corley, 2013) and on the notion of identity accountability (Unerman & O'Dwyer, 2006). It develops a theoretical framework that interprets lateral accountability as a form of identity workprocess—a reflexive process through which organizational actors construct, contest, and align a shared sense of "who we are." By reframing accountability as an identity-producing practice, this paper builds on earlier work that has connected accountability with sensemaking, mission, and organizational identity (Gray, 2002; Unerman & O'Dwyer, 2006; Roberts, 2009; Ebrahim, 2003). These studies suggest that accountability practices do not merely report performance but also shape how organizational members construct shared meanings of purpose and legitimacy. We propose a framework structured around three processes—identity construction, relational legitimacy, and adaptive coherence—that capture how lateral accountability sustains coherence and mission alignment within hybrid NPOs. This framework explains how internal, relational accountability practices support the negotiation of values and collective purpose within organizations facing multiple institutional logics. The paper bridges nonprofit governance, organizational identity theory, and critical accounting by introducing a micro-foundational perspective on accountability. It contributes to debates on hybrid organizing (Battilana & Lee, 2014) and to critical discussions on audit-based accountability systems (Power, 1997; Michelon, Sealy & Trojanowski, 2020), showing how such systems often reduce accountability to standardized reporting. In contrast, this paper highlights the relational and meaning-making dimensions of internal accountability, emphasizing how NPOs sustain identity coherence and mission alignment through everyday reflective and dialogic practices.

Keywords: Nonprofit accountability; lateral accountability; identity work; organizational identity; hybrid organizations; mission drift

Theme(s): Cooperative Governance and Management; Measuring Impact and Performance of Cooperatives

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When Fairness Meets Leadership: Organizational Justice, Leader–Member Exchange, and Work Engagement in a Brazilian Agri-Food Cooperative

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Abstract

Background

Agricultural cooperatives contribute to rural development, agricultural coordination, and local economic sustainability. In Brazil, these organizations are particularly relevant in the Central-West region, where cooperative structures support agricultural production and regional development. Despite their economic importance, the long-term sustainability of cooperatives also depends on internal organizational dynamics that foster trust, fairness, and employee commitment.

Within organizational behaviour research, organizational justice and leader–member exchange (LMX) are recognised as factors associated with positive work attitudes. Fair organizational practices influence employees' perceptions of legitimacy and reciprocity, while high-quality leadership relationships promote trust, support, and mutual obligations. However, most studies on justice and engagement have been conducted in corporate settings, with limited empirical evidence from cooperative organizations. This represents an important gap, as cooperatives combine economic objectives with democratic governance and collective values, making fairness and relational leadership mechanisms particularly relevant.

Aims

This study examines the relationships between organizational justice, LMX, and work engagement among employees of an agricultural cooperative in Brazil's Central-West region. Specifically, it examines the relationships of procedural justice, distributive justice, and LMX with work engagement, as well as the mediating role of LMX in the relationships between the two dimensions of organizational justice and work engagement. By examining these relationships, the study seeks to clarify how perceptions of organizational justice and the quality of leader–member relationships are associated with employee work engagement in the context of agricultural cooperatives.

Methods

The study adopts a quantitative research design based on survey data collected from 152 employees working in an agri-food cooperative. Respondents had at least six months of tenure in the organization, ensuring familiarity with its managerial practices and leadership dynamics. The questionnaire included validated scales widely used in organizational research. Work engagement was measured using the Utrecht Work Engagement Scale (UWES-9), which captures vigor, dedication, and absorption. LMX was assessed through the LMX-7 scale, measuring the quality of relational exchanges between supervisors and employees. Organizational justice was operationalized through established distributive and procedural justice measures. Data analysis was conducted using confirmatory factor analysis and structural equation modelling with the weighted least squares mean and variance adjusted (WLSMV) estimator, which is suitable for ordinal data. The theoretical framework is grounded in Social Exchange Theory, which posits that fair organizational practices foster reciprocal attitudes and behaviours through relational mechanisms.

Results

The results highlight the relevance of procedural justice for work engagement in the cooperative context. Procedural justice showed a positive and significant relationship with work engagement (β = 0.438, p = .007), whereas distributive justice (β = 0.107, p = 0.540) and LMX (β = 0.093, p = 0.522) showed no significant direct relationships with work engagement. Regarding the relationships between organizational justice and LMX, distributive justice was positively and significantly related to LMX (β = 0.524, p = 0.006), whereas procedural justice was not significantly related to LMX (β = 0.252, p = 0.201).

The mediation analysis showed that LMX did not mediate the relationship between procedural justice and work engagement (β = 0.023, p = 0.523) or the relationship between distributive justice and work engagement (β = 0.049, p = 0.548). Although distributive justice was positively related to LMX, its indirect relationship with work engagement through LMX was not statistically significant.

Discussion

These findings suggest that different dimensions of organizational justice may play distinct roles in employees' workplace experiences. Procedural justice appears to be particularly relevant to work engagement, reinforcing the importance of fair, consistent, and impartial organizational procedures. In contrast, distributive justice may be more closely associated with the quality of leader–member relationships, although this relationship did not result in an indirect effect on work engagement.

Contributions and Implications

This study contributes to the cooperative research literature in three main ways. First, it expands the analysis of organizational behaviour in agricultural cooperatives by examining organizational justice, LMX, and work engagement in an organizational context grounded in values of participation, democracy, and equity. Second, the findings show that different dimensions of organizational justice are associated with distinct aspects of employees' workplace experiences: procedural justice was directly related to work engagement, whereas distributive justice was related to the quality of LMX. Third, the study provides a more nuanced understanding of the role of leader–member relationships by showing that LMX did not act as a mediating mechanism between organizational justice and work engagement in the context investigated.

From a managerial perspective, the findings suggest that cooperative management should establish objective procedures, apply them consistently, and communicate clearly how decisions are made. In addition, clear criteria for compensation, rewards, advancement opportunities, and other benefits may also support perceptions of fairness and the quality of relationships between employees and leaders. Overall, procedural justice was associated with work engagement, whereas the proposed mediating role of LMX was not supported in the cooperative studied.

Keywords: Work Engagement; Organizational Justice; Procedural Justice; Leader–Member Exchange; Agricultural Cooperatives

Theme(s): Cooperative Governance and Management; Measuring Impact and Performance of Cooperatives

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2. Technology, Digitalization and Emerging Themes

Research streams: Technology, Digitalization, and Platform Cooperatives · Emerging Sectors and New Themes

10 contributions

Madrid as a Testing Ground for Emerging and Innovative Companies in the Social Economy

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Abstract

Background

The approval of the Emerging Companies Ecosystem Support Act (commonly known as the Startup Act) has fostered the creation and development of innovative companies. Furthermore, the Spain Entrepreneurial Nation Strategy has identified key driving sectors and priority lines of action aimed at strengthening the competitiveness of the productive sector, promoting talent attraction, investment, and the consolidation of an entrepreneurial ecosystem.

In this scenario, the Community of Madrid can be considered a region of significant importance, as it concentrates a substantial share of the country's entrepreneurial activity and provides a favorable environment for experimentation and the development of new business models.

Within this framework, the social economy plays a strategic role by combining economic goals with principles of participation, sustainability, and social cohesion. However, the integration of these entities into the startup ecosystem raises several questions regarding compliance with regulatory requirements and the level of awareness surrounding these companies.

Objectives

This research pursues the following objectives:

1. Analyze the percentage of cooperative societies and worker-owned companies (*sociedades laborales*) incorporated in the Community of Madrid during the 2022–2024 period that operate in the strategic sectors defined by the Spain Entrepreneurial Nation strategy and meet the requirements established for classification as emerging companies (startups). This analysis will identify the factors explaining the gap between entities recognized by ENISA and those that, despite meeting the criteria, do not obtain this certification.
2. Evaluate the level of awareness among recently created cooperative societies and worker-owned companies (2022–2024) in the Community of Madrid regarding the emerging company status, as well as the benefits and advantages associated with this condition.

Methodology

This research adopts a mixed-methods approach, combining quantitative and qualitative techniques. Phases:

1. **Design of questionnaires** aimed at cooperative societies and worker-owned companies (*sociedades laborales*), designed to gather data on their organizational characteristics, operations, and level of awareness regarding the Emerging Companies Ecosystem Support Act.
2. **Sample selection.**
3. **Conducting working sessions** with key stakeholders, including representative organizations from the social economy and technical teams from the Community of Madrid, to validate the methodology and enhance the reliability of the gathered information.
4. **Data Processing and Analysis:** Systematic processing of the collected data through statistical techniques and qualitative analysis tools

Results

Regarding compliance with the criteria established for classification as an emerging company (startup), the results show that a significant percentage of these entities meet the conditions required by the regulations. However, the proportion of cooperatives and worker-owned companies (*sociedades laborales*) that have actually obtained the corresponding certification from ENISA is remarkably lower. This gap highlights the existence of limiting factors that hinder access to such recognition. In this regard, a relevant portion of the surveyed cooperatives and worker-owned companies report a lack of awareness regarding the possibility of being considered emerging companies, as well as the benefits associated with this status.

Furthermore, the fact that innovative companies (startups) do not choose to structure themselves as cooperative societies or worker-owned companies is also linked to a lack of training and information, as well as a lack of alignment and adequate support between social economy entity regulations and startup legislation.

Discussion

The results highlight the existence of significant potential for greater integration of cooperatives and worker-owned companies (*sociedades laborales*) into the startup ecosystem of the Community of Madrid, which is, however, constrained by informational and structural barriers.

The findings allow for a deeper examination of the role played by the Community of Madrid as an experimental hub for the creation and consolidation of emerging companies within the social economy, shedding light on both its strengths and its structural limitations.

In this regard, the findings confirm that while a regulatory and institutional framework favorable to innovative entrepreneurship exists, its impact on the business models characteristic of the social economy is neither uniform nor fully effective.

Contributions and Implications

The analysis conducted for the Community of Madrid confirms the existence of a favorable environment for the creation of emerging and innovative companies, while also revealing significant misalignments in the effective integration of cooperative societies and worker-owned companies (*sociedades laborales*) into this ecosystem.

This research highlights the need to strengthen institutional dissemination and support mechanisms. In particular, it underscores the importance of adapting existing support instruments to the specific characteristics of the social economy, as well as promoting tailored training initiatives to facilitate these entities' access to tools designed for startups.

Ultimately, Madrid stands out as an environment with high potential to serve as a testing ground for social economy startups; however, realizing this potential will depend on the ability to align institutional instruments with the specific characteristics and needs of these entities.

Keywords: Cooperativas, Sociedades Laborales, Empresas Emergentes, Innovación, Escalabilidad

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What Do We Know and What Is Next? A Systematic Literature Review of Stakeholder Theory in Cooperative Research

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Abstract

Background

Stakeholder theory assumes that the firm and its stakeholders are distinct parties whose claims managers balance (Donaldson & Preston, 1995; Freeman, 1984). In cooperatives, however, the same members may simultaneously be owners, users, suppliers, customers or workers, which blurs this boundary (Billiet et al., 2025). Cooperatives are therefore a fertile setting to apply stakeholder theory and to examine the limits of its assumptions. Previous reviews of cooperative research have not examined how the theory has been used, and the only review adopting this lens is restricted to platform cooperativism (Ghirlanda & Kirov, 2024).

Aims

The study examines how research on stakeholder theory in cooperatives has developed and what its intellectual and conceptual structures are, which themes and tensions emerge from it, and how the cooperative context expands, adapts or challenges the theory.

Methods

Following PRISMA 2020 (Page et al., 2021), Scopus and the Web of Science were searched on 24 March 2026, limited to journal articles and reviews in English. Of 701 records, 164 duplicates were removed, two reviewers excluded 487 records at screening and 16 at full-text assessment, resulting in 34 studies published between 2007 and 2026. The corpus was analysed through bibliometric techniques in Biblioshiny (Aria & Cuccurullo, 2017) and VOSviewer (van Eck & Waltman, 2010) and through a thematic synthesis of the full texts, which also coded sector, research design, dominant strand of stakeholder theory and stakeholder groups.

Results

The field is recent, fragmented and weakly cumulative. Half of the articles were published from 2022 onwards, dispersed across 29 journals mostly at the periphery of both literatures; 91% of the author keywords appear only once, and only ten citations link the studies to one another. Production is concentrated in Europe, whereas studies from the Global South are almost entirely domestic. Agri-food and financial cooperatives are the most studied sectors, and qualitative (14) and quantitative (13) designs appear in similar numbers. Descriptive studies predominate (19), instrumental studies (11) have become more frequent in recent years, and no study adopts the normative strand as dominant. Members, managers, consumers and workers are the stakeholder groups most frequently analysed. The thematic synthesis identifies four convergences. First, role overlap reduces information problems, as shown by lower non-performing loans in cooperative banks (Fiordelisi et al., 2023), but raises participation costs (Kotliarov, 2022). Second, engagement, mutual help and public support are associated with resilience in crises, although the evidence is mostly cross-sectional. Third, attention to stakeholders is embedded in cooperative identity, whereas the institutionalisation of corporate social responsibility varies with the context. Fourth, formal voice mechanisms coexist with engagement confined to non-business issues (Passetti et al., 2019).

Discussion

The cooperative emerges as a boundary case for stakeholder theory. Role overlap blurs the separation between the firm and its stakeholders, constrains managerial discretion because the claims to be balanced are held by the same party (Billiet et al., 2025), and imposes participation costs on members. Tensions between democratic principles and business logic, between voice and its costs, and between values and conduct suggest that stakeholder orientation is a potential that depends on governance design, scale and institutional context rather than an intrinsic property of the cooperative form. The absence of normative studies indicates that the normative core of the theory remains detached from cooperative research.

Contributions and Implications

The study contributes to stakeholder theory by identifying a context in which one of its core premises does not hold and specifying the mechanisms involved, and to cooperative research by integrating a fragmented literature. For cooperative managers, members and federations, democratic ownership does not guarantee engagement, whose depth depends on governance design and on extending dialogue to core business decisions. Based on the studies published between 2024 and 2026, the research agenda emphasises participatory governance, longitudinal and comparative designs, broader stakeholder sets and the consistency between sustainability communication and practice. The limitations include the use of two databases, the restriction to English-language journal publications, the absence of citation searching and the partial coverage of 2026, since the searches were run in March of that year.

Keywords: Stakeholder theory; cooperatives; stakeholder engagement; systematic literature review

Theme(s): Emerging Sectors and New Themes

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Digital transformation in social economy: Do social economy enterprises convert advanced technologies into innovation and growth differently from conventional firms?

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Abstract

Background

Digital transformation has become a central driver of organizational change, yet adopting advanced digital technologies does not automatically create value. Its contribution depends on complementary organizational transformations and on the firm's capacity to sense opportunities, seize them, and reconfigure its resource base (Brynjolfsson & Hitt, 2000; Teece, 2007). Business model innovation (BMI), understood as the intentional redesign of how a firm creates, delivers, and captures value, is a plausible mechanism for converting technological resources into innovation outcomes (Foss & Saebi, 2017; Zott et al., 2011). Social economy enterprises (SEE), such as cooperatives and mutual societies, are defined by the primacy of people and social purpose over capital, democratic governance, and the collective allocation of surpluses (Monzón & Chaves, 2017). As hybrid organizations, they combine economic, social, and often environmental logics (Battilana & Lee, 2014; Doherty et al., 2014) that may shape how technologies are deployed and how business model changes become innovation and growth. However, large-scale comparative evidence on these mechanisms in SEE and conventional enterprises (NSEE) is scarce, and the contingent role of innovation barriers remains insufficiently understood (D'Este et al., 2012).

Aims

This study examines whether SEE convert advanced digital technology adoption (ADTA) into innovation and growth differently from NSEE. Drawing on the dynamic capabilities perspective, it develops and tests an integrated model in which ADTA drives BMI, BMI drives innovation, and innovation drives firm growth, while barriers to innovation moderate the conversion at each stage. The model predicts the same direction for the focal relationships in both groups and asks which structural paths differ significantly between them.

Methods

We use microdata from Flash Eurobarometer 559, collected in 2025 from 17,791 firms in 38 countries (European Commission, 2025), and restrict the analysis to the EU-27. Because the survey lacks a direct question on social economy membership, SEE are identified through ownership: firms jointly owned by their members as a cooperative or mutual society, without venture capital, business angel, or non-EU foreign ownership, which captures the cooperative–mutual core of the sector. One-to-one propensity score matching without replacement, exact on country and based on size, age, and sector, produced a balanced sample of 920 firms (460 SEE and 460 NSEE). All constructs are specified formatively: ADTA covers five advanced technologies, from artificial intelligence to cybersecurity; innovation covers product, process, environmental, and social dimensions; barriers capture five environmental obstacles; and firm growth combines expected growth in employees and turnover. The model is estimated with PLS-SEM using bootstrapping with 10,000 subsamples (Hair et al., 2022). Measurement invariance is assessed with the MICOM procedure, and group differences with a permutation-based multigroup analysis (Henseler et al., 2016), since significance within each group does not by itself establish a difference between groups.

Results

MICOM establishes full measurement invariance for all constructs. ADTA drives BMI equivalently in both groups (SEE: $\beta = 0.174$, $p < 0.001$; NSEE: $\beta = 0.216$, $p = 0.006$). The permutation test shows that three of the eleven paths differ significantly, and all three concern the formation of innovation. First, ADTA is directly associated with innovation only in SEE ($\beta = 0.198$ versus -0.015; $\Delta\beta = 0.213$, $p = 0.016$). Second, BMI drives innovation in both groups, but its effect in SEE is twice as large ($\beta = 0.470$ versus 0.232; $\Delta\beta = 0.238$, $p = 0.044$). BMI mediates the ADTA–innovation relationship in SEE (indirect $\beta = 0.082$, $p = 0.003$) and only marginally in NSEE ($p = 0.054$), so the total effect of ADTA on innovation is substantial in SEE ($\beta = 0.280$, $p < 0.001$) and practically nil in NSEE ($\beta = 0.035$, n.s.). Third, barriers play an ambivalent role in SEE: their main effect on innovation is positive ($\beta = 0.211$, $p = 0.008$), yet they weaken the conversion of BMI into innovation (interaction $\beta = -0.297$, $p = 0.012$), whose slope falls from 0.470 at mean barrier levels to a non-significant 0.173 one standard deviation above the mean. No such interaction appears in NSEE, and the group difference is significant ($\Delta\beta = -0.346$, $p = 0.044$). No relationship leading to growth differs between groups, and no direct path to growth is supported, although the total effect of BMI on growth is significant in SEE ($\beta = 0.324$, $p = 0.036$). The model explains innovation significantly better in SEE ($R^2 = 0.231$ versus 0.123) and has predictive relevance for innovation and BMI, but not for growth.

Discussion

These findings show that heterogeneity between organizational forms concentrates at one specific stage, the formation of innovation, and dissipates before growth. Two regimes emerge. In SEE, technology turns into innovation through a dual pathway, both directly and through the business model; this conversion is intense but sensitive to environmental friction. In NSEE, a decoupled regime operates: technology feeds business model redesign but does not translate into innovation, which rests on a weaker BMI pathway that is unaffected by barriers. Because the subsamples are matched on size and sector, the SEE advantage does not stem from scale. A plausible explanation is that, in the social economy, the business model is an architecture of value creation and distribution intertwined with the mission and a broad stakeholder base, so redesigning it mobilizes the organization more deeply (Tykkyläinen & Ritala, 2021). The same coupling makes this pathway dependent on financing, market access, and administrative room, precisely where barriers bite, producing a capability–vulnerability duality. The weak explanation of growth is consistent with evidence that innovation does not translate universally or immediately into growth (Coad et al., 2016), with growth measured as cross-sectional expectations, and with mission-driven organizations not necessarily pursuing expansion (Saebi et al., 2019). The relationships should therefore be read as theoretically grounded associations rather than causal effects.

Contributions and Implications

The study makes four contributions. It reconceptualizes ADTA as a capability whose innovative return depends on organizational form, challenging techno-deterministic readings of digital transformation. It positions BMI as the central conversion mechanism and shows that its strength is amplified, not attenuated, under the logic of the social economy. It reinterprets innovation barriers as ambivalent, form-specific forces that stimulate innovation in SEE while eroding their most productive pathway. Finally, it separates the formation of innovation from growth, suggesting that the comparative advantage of hybrid organizations should be theorized and measured in the architecture of innovation rather than in growth outcomes. For SEE managers, the priority is to shield the business model pathway from friction through financial slack, alliances, and market access. For conventional firms, investment in technology should be coupled with business model innovation capabilities. For policymakers, particularly under the European Social Economy Action Plan, the results argue against form-blind innovation policy and in favor of instruments that ease funding, administrative, and market barriers where their removal has an amplified effect.

Keywords: Advanced technology adoption; Business model innovation; Innovation barriers; Social economy enterprises; PLS-SEM multigroup analysis

Theme(s): Technology, Digitalization, and Platform Cooperatives

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Economic Performance in Manufacturing Cooperatives: Evidence on Circular, Digital, and Twin Innovation and Innovators

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Abstract

Background and Aims

Recent studies on cooperatives and twin transition have mainly examined the factors that make circular and digital innovation more or less likely to emerge. In this respect, contributions such as Coletti et al. (2024) and Guerreschi & Zecca (2025) have been important in showing how organizational characteristics, internal capabilities, and external conditions shape innovation adoption within cooperative firms. Our paper builds on the existing literature, yet moves the discussion one step further by shifting attention from the determinants of innovation to diverse economic implications. More specifically, rather than asking why cooperatives innovate, this paper questions whether circular, digital, and the cooperation of the two (twin innovators) display better economic performance than non-innovators entirely, and whether the joint adoption of circular and digital innovation is associated with stronger outcomes than innovation in only one of the two dimensions.

This shift is also consistent with a broader firm-level literature suggesting that environmental and digital innovation may affect economic outcomes through different but potentially complementary channels, including efficiency gains, improved organizational processes, stronger market positioning, and cost reduction. In particular, Antonioli et al. (2018) show that complementarities between environmental innovation and ICT can matter for firms' productivity, offering a useful conceptual basis for examining whether a similar performance premium may emerge in the cooperative context. Flachenecker et al. (2022) likewise show that eco-innovation can be linked to stronger economic outcomes such as turnover, employment, and market performance, reinforcing the idea that the consequences of innovation should be evaluated not only in terms of adoption, but also in terms of firm-level results.

Data and Methodology

Empirically, the paper uses an original dataset designed to analyze innovation strategies among Italian manufacturing cooperatives. The primary source is a stratified survey conducted in 2025, that collects harmonized information for the fixed period 2021–2023 on the introduction of circular economy innovations and digital innovations, along with governance features, market orientation, and organizational capabilities. The dataset is combined with the most recent AIDA (Italian) balance-sheet information available for the sampled manufacturing cooperatives. The paper examines whether cooperatives with different innovation profiles display systematically different economic outcomes. To do so, firms are classified into four mutually exclusive groups: non-innovators, circular-only innovators, digital-only innovators, and twin innovators. This distinction is central to the paper because it allows us to move beyond a simple comparison between innovators and non-innovators and to assess whether the joint adoption of circular and digital innovation is associated with stronger economic performance than either strategy taken in isolation. This is especially relevant in light of recent work on twin transition and firm performance, which has also relied on innovation survey data and has faced similar limitations regarding the exact timing of adoption within a multi-year survey window (Choi & Kim, 2025).

The empirical strategy is based on a set of OLS econometric models in which alternative indicators of economic performance are regressed on innovation-profile dummies and a set of firm-level controls. In this framework, non-innovators constitute the reference category, while the coefficients of interest capture the performance differentials associated with circular-only, digital-only, and twin innovation. This specification makes it possible not only to compare each innovation profile with non-innovators, but also to carry out

direct comparisons across innovation groups, which is essential for the paper's main research question. The key issue is not simply whether innovative cooperatives perform better on average, but whether and how twin innovators differ significantly from cooperatives that innovate only in the circular domain or only in the digital one. In practice, this means testing whether the estimated coefficient for twin innovators is statistically different from the coefficients associated with circular-only and digital-only innovators. In this way, the analysis speaks directly to the question of complementarity and allows us to assess whether the economic relevance of twin innovation goes beyond the sum of its individual components. The analysis considers more than one indicator of performance because firm performance is inherently multidimensional, and innovation may affect different outcomes in different ways. In line with the existing literature, the empirical analysis can therefore focus on a parsimonious set of balance-sheet-based measures, such as turnover, labour productivity, and profitability (and economic sustainability), depending on data availability and quality (Antonioli et al., 2018; Flachenecker et al., 2022; Choi & Kim, 2025).

Implications

Overall, the paper contributes to the literature by extending the analysis of cooperatives' innovation from its determinants to its economic implications, thereby opening a line of inquiry that remains relatively underexplored in the study of cooperatives, but not only. The gap is especially required in closing the connection between cooperative and other firm types to identify and question how different governance structures affect innovation decisions.

Keywords: cooperatives; twin innovation; circular innovation; digital innovation; economic performance

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Beyond the hype, techno-economic evaluation of agentic artificial intelligence workflows in agrifood cooperative operations and comparable enterprises: A scoping review

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Abstract

Background

Agrifood cooperatives are not simply firms with a different ownership model. They coordinate member interests, commercial obligations, compliance, procurement, and board accountability across organisational boundaries, under democratic governance rules distinctive to the cooperative model. Spanish and European cooperatives face growing digitalisation pressure but have limited evidence on whether technology creates net value after full costs are counted. In second-tier and federated structures, where coordination demands are highest, the harder challenge is not automating tasks but ensuring the flow of value across legally separate members, dispersed sites, mismatched information systems, and export markets.

Agentic artificial intelligence (AI), meaning systems that plan, use tools, and carry out multi-step tasks with limited human intervention, is increasingly promoted for procurement, finance, compliance, member services, and decision support. Task automation alone tells us little about economic value. We ask whether agentic AI produces sustainable net value, under which conditions, and whether evaluation methods count the costs of integration, oversight, and data readiness, not just the benefits.

Preliminary mapping suggests direct evidence on the techno-economic value of agentic AI in cooperative coordination and business-support work may be thin. Stronger evidence appears in generative AI, robotic process automation (RPA), enterprise AI, and cooperative digital transformation. We treat back-office and business-support functions as the empirical entry point for examining where coordination and governance costs arise and where value may be generated, while using adjacent evidence only where transferability to Spanish agrifood cooperative structures is clear and justified.

Aims

Against this backdrop, our scoping review maps how the techno-economic value of agentic AI workflows is measured in coordination and governance-intensive business-support functions of agrifood cooperatives and comparable enterprises. Spanish and European agrifood cooperatives are the priority setting, especially second-tier and federated structures. We examine which methods, metrics, costs, and governance conditions get reported, and what that means for building a cooperative-specific measurement framework.

We ask how studies tell agentic and generative workflows apart; where value arises across coordination, contracting, monitoring, and decision support; which techno-economic methods and proxies they use; and which cost components they leave out. We apply a transaction-cost lens throughout, treating net value as operational benefits minus the full coordination, monitoring, governance, and oversight costs the cooperative executes.

Methods

We will conduct a scoping review guided by Joanna Briggs Institute (JBI) methodology, as described by Peters et al. (2024), and reported in line with the Preferred Reporting Items for Systematic reviews and Meta-Analyses extension for Scoping Reviews (PRISMA-ScR) developed by Tricco et al. (2018). Population, Concept, and Context set eligibility. The population includes agrifood cooperatives, second-tier and federated structures, producer organisations, large agrifood enterprises, and comparable enterprises, with priority given to Spanish and European cooperatives. The concept is techno-economic evaluation of agentic AI and related AI-enabled workflows, covering methods, metrics, costs, benefits, risks, value mechanisms, and total cost of ownership (TCO). The context is coordination and governance-intensive business-support work, with back-office operations as observable sites of transaction, coordination, monitoring, governance, and decision costs.

The mapping prioritises peer-reviewed evidence with controlled extensions to adjacent sectors, labelled by proximity and will not be treated as direct cooperative evidence. These costs require observable proxies and explicit assumptions. Full searching, screening, and charting remain incomplete. We therefore keep operational proxies separate from economic value throughout and use adjacent evidence only where transferability is clearly stated.

Results

The results at this point, before full systematic searching, remain preliminary. The scoping suggests little direct evidence on agentic AI in agrifood cooperative coordination and business-support, while stronger material sits in generative AI productivity research, RPA, enterprise AI, and cooperative digital transformation.

The best available evidence is back-office-adjacent. Brynjolfsson et al. (2025) found that a generative AI assistant raised resolved issues per hour in customer-support work, with larger gains among less experienced staff. This shows how AI can affect coordination-heavy support tasks, but not net value in cooperative settings. RPA in finance and accounting points in the same direction: labour-hour savings, error reduction, and lower cost per task (Kokina and Blanchette, 2019). Still, RPA is mostly rules-based, so transferability is limited. Agentic AI adds autonomy and exception-handling, raising governance and oversight costs that RPA evidence does not fully capture.

Value shows up through faster retrieval, fewer errors, and better exception routing. These effects can proxy for information search, coordination, contracting, monitoring, and governance costs, but only where the link is explicit. Common metrics are operational: cycle time, error rates, and cost per task. Formal measures such as return on investment, net present value, and total cost of ownership are harder to find. The broader AI business-value literature confirms thin cost accounting alongside value signals (Enholm et al., 2022), and cooperative-specific evidence is thinner still: Spanish agrifood studies focus on digital maturity, not AI workflow economics (Santos et al., 2024).

The main gap is weak net-value treatment. Productivity gains are easier to observe than integration costs, validation effort, oversight time, data readiness, and board assurance. For Spanish second-tier and federated cooperatives this gap bites harder, given higher integration complexity and accountability requirements.

Discussion

This measurement problem is built in. Most studies report faster work, fewer errors, or lower cost per task, then leave the integration, oversight, and governance costs uncounted. Gross productivity is a poor basis for an investment decision.

That is why the proxy-to-bottom-line gap matters. A shorter cycle time may suggest lower coordination cost, but only if saved time is redeployed or rework falls. Error reduction may suggest lower monitoring cost, but only if it reduces claims, audit work, correction effort, or compliance exposure. Without that link, an operational improvement is just a process measure, not evidence of net value.

Spanish second-tier and federated cooperatives need a framework built for their distinctive structure. Their business-support functions span legally separate members, heterogeneous systems, democratic governance, member trust, and board accountability. Recent work extends *Coasean* logic to AI agents, asking whether they can lower transaction and coordination costs at scale while leaving net value as an empirical question (Shahidi et al., 2025). Efficiency gains must stay compatible with accountability, legitimacy, and transparent control (Cook, 1995).

Governance is therefore part of the value calculation. Auditability, human oversight, and validation take recurring effort that eats into expected economic benefits. Agentic AI may cut routine search, drafting, and checking while pushing work back into verification, oversight, and board assurance. These costs are rarely priced in current evaluation designs, and regulatory obligations under the EU AI Act are likely to add further compliance and oversight costs that evaluations will need to capture.

Contributions and Implications

Unlike digital-maturity models, this review scaffolds a cooperative-specific framework that prices the governance and oversight costs agentic AI adds, not just the tasks it speeds up. The framework makes proxies, assumptions, TCO, oversight, and governance conditions explicit. Cooperative value depends on whether net benefits survive once the costs of integration, supervision, and organisational change are accounted for.

For managers and boards, this supports disciplined AI investment appraisal rather than generic automation claims. For federations and policymakers, it points to where shared services, interoperability, and governance capacity may create value. Researchers gain a framework that connects cooperative digital transformation, agrifood competitiveness, and techno-economic evaluation in a form that can be tested.

This is an early stage in a longer thesis. Later work will test these constructs with cooperative stakeholders and in bounded pilots, but none of that is presented here.

Keywords: Agentic artificial intelligence; agrifood cooperatives; cooperative governance; techno-economic evaluation; transaction cost economics

Theme(s): Technology, Digitalization, and Platform Cooperatives

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Co-operatives in Times of War and Conflict: Robustness, Resilience, and Recovery

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Abstract

Co-operatives have historically functioned as robust democratic enterprises capable of stabilizing local economies and sustaining communities during periods of profound disruption. Across diverse contexts – including economic collapse, pandemics, ecological transitions, and armed conflict – co-operatives have been organizational anchors for communities, enabling collective survival, resilience, and social reconstruction (Birchall & Ketilson, 2009; Gordon Nembhard, 2014). Recent global "polycrises" have intensified scholarly and policy interest in co-operative responses to instability, particularly in contexts where state capacity is severely weakened and market institutions falter (Costa & Delbono, 2023; Merrien et al., 2023) – and especially in times of armed conflict and war (Dulcey Martínez, 2016; Williams, 2014). The ongoing war in Ukraine further underscores the urgency of examining cooperatives as key infrastructures of mutual aid, democratic governance, and post-conflict recovery (Kutsyk et al., 2023; Ukraine Recovery Conference, 2025).

This paper aims to systematically synthesize and critically assess the state of the academic and practice-oriented literature on co-operatives operating in times and contexts of war and conflict. Specifically, it examines how co-operatives demonstrate robustness during severe crises produced by war and armed conflict, cultivate organizational and community resilience, and contribute to post-conflict recuperation and reconstruction. Ultimately, the paper seeks to advance theoretical and empirical understanding of co-operatives as enduring socio-economic institutions in times of profound uncertainty.

This study employs an integrative literature review methodology (Torraco, 2016), generating new knowledge through the critical analysis, synthesis, and reconceptualization of existing scholarship on cooperatives in contexts of armed conflict. Our review systematically engages with academic, policy, and practitioner-oriented literature on co-operatives in times of conflict and war with the aim of identifying core concepts, tensions, and gaps across disciplines. The review develops a coherent analytical, thematic, and conceptual framework from diverse contexts and traditions, such as sociology; geography; anthropology; economics; and organization, social economy, and cooperative studies. This approach is well suited to the emerging and under-theorized field of co-operatives, conflict, and post-conflict recovery.

The review reveals consistent evidence that cooperatives exhibit distinctive crisis-response and post-conflict recovery capacities across economic, social, and political dimensions. Key findings highlight co-operatives' ability to maintain production and employment during crises (Vieta, 2020; Merrien et al., 2023), safeguard community-based supply chains and even digital infrastructures (Amelina & Bezus, 2020), and foster trust and social cohesion in post-conflict, post-war, and post-disaster environments (Cooperatives Europe, 2019; Emmanuel & MacPherson, 2007; Imperiale & Vanclay, 2016). Empirical studies from Ukraine, Latin America, and Southern Europe illustrate how co-operative governance structures enable adaptive decision-making and member and community protections, while offering economic and social buttresses for long-term recovery and sustainability (Costa & Delbono, 2023; Bianchi & Vieta, 2019), even under original conditions of extreme losses and precarity due to war (Bohdanov et al., 2025; Kutsyk et al., 2023).

The findings challenge dominant crisis and recovery frameworks that prioritize state-led or market-driven responses while marginalizing grassroots, community-centred, and democratic institutions. Co-operatives are shown to operate not merely as temporary shock absorbers but as foundational infrastructures for sustainable socio-economic recuperation. The review also highlights significant gaps in the literature,

including limited engagement with active war zones, gendered cooperative responses, and Global South perspectives. Integrating co-operative studies with resilience theory, peace and conflict studies, and social and solidarity economy scholarship offers fertile ground for advancing interdisciplinary research on cooperatives in times of conflict and war and their role in socio-economic recovery.

This paper contributes to co-operative studies and organizational research by offering perhaps the first integrative literature review of co-operatives in contexts of war and conflict. It advances theoretical debates on organizational resilience while providing practical insights for policymakers, co-operative leaders, and international institutions seeking inclusive and democratic recovery strategies during times of extreme socio-economic difficulties due to war and other forms of armed conflict.

Keywords: Co-operatives; Conflict; War; Resilience; Post-conflict recovery

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SESSION PROPOSAL

Collaborating on Cooperative Research Directions and Initiatives

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Abstract

Objectives of Session: The purpose of this session at the ICA CCR 2026 research conference is to continue the collaboration on cooperative research between several relevant research entities and networks, to explore cooperative research needs and gaps, and plan further activities.

Contents and background: To celebrate the UN International Year of Cooperatives, an International Research Colloquium on Cooperatives, was organized in May 2025, by EURICSE, the International Cooperative Alliance Global Committee on Cooperative Research (ICA CCR), the EMES International Research Network, CIRIEC International, and the University of Trento. This colloquium was a collaborative effort to move beyond Western-centric views by examining how cooperative enterprises function across diverse regions like Africa, Asia, and Latin America, as well as Europe. Research focused on four primary areas: the evolution of new cooperative forms, their role in ecological transitions, the dynamics of workplace democracy, and the importance of inter-cooperative partnerships. Participants emphasized the need for various epistemologies, critical approaches and interdisciplinary methods to address modern challenges such as climate change and economic inequality. Ultimately, the need for a forward-looking research agenda aimed at strengthening the transformative power of the cooperative model worldwide was acknowledged and agreement reached that future collaboration would continue.

Proposed Format: The session will begin with an informative session and thereafter will be interactive with participants, with the collective creation of the session results for collaboration on cooperative research.

Participants: Representatives of ICA CCR Global, EMES, CIRIEC Int., EURICSE and open to all conference participants interested in finding complementary bridges for research initiatives.

Keywords: Research on Cooperatives, Social Economy, Research Collaboration, Research Methodologies

Theme(s): Intercooperation and Networking among Cooperatives; Emerging Sectors and New Themes

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Resource - https://jeodonline.com/jeod_articles/trento-international-research-colloquium-on-cooperatives/

Representing the Cooperative Movement: The International Cooperative Alliance in the Early 20th Century

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Abstract

How does a transnational meta-organization turn a dispersed and heterogeneous set of bottom-up organizations into a collective that is recognized by actors within and outside the field? Meta-organizations, associations whose members are organizations rather than individuals, are expected to create a shared, coherent and distinct identity for the collective they represent, through activities such as knowledge production, advocacy, and the diffusion of shared practices (Ahrne & Brunsson, 2005; Berkowitz et al., 2022). Within this context, we know relatively little about how they represent the collective and make it visible at the field level (Berkowitz et al., 2022; Brankovic, 2018). In this paper, we ask: What does representative look like when the organizational category is not yet well established and members are heterogeneous across countries, sectors, and institutional contexts? How do meta-organizations decide what becomes countable, which categories will be used, and how comparability will be claimed or limited?

The cooperative movement at the turn of the twentieth century offers a rich setting for examining these questions. Unlike the guilds and commons that preceded them as institutions, cooperatives formed bottom-up into a movement with a legal form that sought to organize itself across borders. Cooperative organizations varies in sector, scale, legal structure, political orientation and degree of consolidation, and even in regions often treated as coherent, such as norther Europe, the movement was internally differentiated and politically contested (Hilson, 2018). At the turn of the century, a cooperative could be framed as a business model, a democratic association, an institution of self-help, an alternative economic order or a vehicle of social reform (Hilson, 2018; Rhodes, 1994).

With the advent of internationalization, the International Cooperative Alliance (ICA), was founded in London in 1985 as one of the earliest and most durable transnational meta-organization to represent this heterogeneous cooperative movement. However, before it could speak for the movement, the ICA had to help define it, using information supplied by its autonomous member organizations. Here, the paper fulfills its objectives through a close interrogation of the representational choices and practices of the ICA.

Our empirical material consists of the complete set of eight early statistical publications that the ICA could locate in its archives, from the first Statistics of Cooperative Societies in Various Countries to the volume with which the Alliance resumed publication after the Second World War. Adopting an interpretive, analytically structured historical approach (Bucheli & Wadhwani, 2014; Rowlinson et al., 2014), we read these yearbooks and statistical statements not as neutral records but as historically situated artifacts through which the ICA attempted to define, order, and stabilize the cooperative movement it claimed to represent. We transcribed the English language prefaces, editorial introductions, methodological notes and classificatory explanations, and analyzed them abductively in two stages (Sætre & Van De Ven, 2021): inductive first-order codes capturing the analytical function of each text segment were subsequently grouped into aggregate dimensions. Throughout, we read the coded text against the statistical tables and against historical contexts of war, political upheaval and shifting membership, attending to authorial purpose, intended audiences and silences in the sources (Wadhwani, 2023).

The analysis identifies three interrelated dimensions of representational practices adopted by the ICA. *First*, constructing the object of representation, addresses what exactly is being represented by the ICA. Confronted with a movement whose categories and boundaries were not settled, the ICA repeated added and removed tables, recorded entry and exit of countries, justified placing organizations in particular

categories, and retained a residual 'miscellaneous' category. Through such classification, inclusion, exclusion and adjustment, it made the movement identifiable as a collective. *Second*, producing conformity without uniformity, addresses how different entities can be presented as parts of one whole. The ICA developed statistical devices for international comparison, such as conversion to a theoretical gold pound or to pound sterling and supplementary price indices, while repeatedly recognizing that the national statistics were 'not drawn up in anything like unform order' and that the organizational forms within the movement resisted full standardization. *Third,* sustaining representation despite imperfection, addresses how the ICA could maintain its claim to represent the movement without being able to provide a complete picture. It named missing countries, acknowledged delayed returns and overlapping tables, expressed modesty about its publications' shortcomings, appealed to members to improve their data returns, presented each volume as part of a continuing series.

Read together, these practices show that the ICA's representational work was largely provisional. The Alliance was still deciding which categories existed and when they had to be added, merged, or removed, a process of classificatory tinkering that mirrors the formative, trial-and-error character of the early cooperative movement. The ICA sought to represent the cooperative movement as a collective whole while acknowledging that the material from which the whole was assembled was partial, heterogeneous, and delayed: the more it sttempted to construct an international overview, the more it was confronted with the impossibility of a complete and standardized picture. The framing of the post-war publication as a resumption 'after an interval of fourteen years' shows that the data collection was a strategic part of representation. Meta-organizational representation, we argue, is therefore not the production of a perfectly coherent picture, but the ongoing organizational work of producing a sufficiently coherent picture from heterogeneous, incomplete and only partially controlled inputs.

The paper makes two contributions. First, it identifies imperfection as an integral aspect of the meta-organizational representational practices. Because a meta-organization relies on autonomous members for its information, incompleteness and non-comparability of the daya was not merely about methodological deficiencies. They were manifestations of the organizational relationship between the ICA and its members. Second, it shows representation through managed heterogeneity rather than homogenization. The representation of the collective arises through practices that make heterogeneous and partially incomparable entities sufficiently commensurable, intelligible and durable parts of a collective. The power of the ICA's number lay not in removing heterogeneity, but in making it representable. Empirically, the case responds to calls for larger datasets and macro-level research on cooperatives and the social economy.

Keywords: Cooperative identity; representatonal practices, meta-organization

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Eco-innovation and online reputation in the olive oil sector: a configurational analysis

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Abstract

Background

Eco-innovation has become a central element in the transition towards more sustainable and competitive business models because it combines economic value creation with reductions in environmental impact through innovations in products, processes, organizational practices and business models (Rennings, 2000). Its nature is particularly complex in the agri-food sector, where sustainability depends on the efficient use of natural resources, by-product management, traceability and responses to increasingly demanding market and societal expectations. The literature also indicates that the determinants of eco-innovation do not operate in isolation but through interdependencies among resources, capabilities, governance, institutional pressures and communication strategies (Horbach et al., 2012; Zhiwei et al., 2025). Within the Social Economy, the cooperative form adds specific features related to ownership structure, member participation, stakeholder orientation and territorial embeddedness. At the same time, digital transformation has increased the relevance of Corporate Social Responsibility (CSR) communication, website quality and online reputation as capabilities that may strengthen the visibility, legitimacy and credibility of sustainable practices. In this regard, environmental disclosure may act as a mechanism fostering green innovation (Xiang et al., 2020), while digital transformation can contribute to the development of eco-innovation and improved sustainable performance (Xu et al., 2023). This multidimensional character (García-Granero et al., 2018) calls for moving beyond a logic based exclusively on net effects and examining how different conditions combine to generate — or hinder — high levels of eco-innovation.

Aims

This study examines how different configurations of governance variables, organizational structure, digital capabilities, online CSR disclosure and online reputation are associated with high levels of eco-innovation among olive oil producing firms in Andalusia. Specifically, it investigates whether multiple sufficient pathways lead to eco-innovation and whether the configurations associated with its absence follow a distinct causal logic, in line with the principles of equifinality and causal asymmetry.

Methods

A sample of 66 firms from the Andalusian olive oil sector, 79% of which are cooperatives, is analysed using fuzzy-set Qualitative Comparative Analysis (fsQCA), a methodology suited to complex organizational phenomena in which different combinations of conditions may lead to the same outcome (Ragin, 2008; Fiss, 2011). The outcome variable is eco-innovation, operationalized as an aggregated multidimensional construct integrating different corporate environmental practices and outcomes. The explanatory conditions are board size, number of members, website quality or development, online CSR disclosure and online reputation. The theoretical framework integrates insights from stakeholder theory, resource dependence theory, the resource-based view, dynamic capabilities, institutional theory, legitimacy theory

and signaling theory. The fsQCA procedure includes both necessity analysis and sufficiency analysis through truth tables. A minimum frequency threshold of three cases and a consistency threshold of 0.85 are used to identify sufficient configurations. Both the presence and the absence of eco-innovation are examined, making it possible to determine whether the conditions leading to one outcome are simply the inverse of those associated with the opposite outcome.

Results

The necessity analysis identifies no individual condition as strictly necessary for eco-innovation, supporting the multifactorial nature of the phenomenon. The intermediate solution for the presence of eco-innovation reaches a consistency of 0.812 and coverage of 0.603 and identifies three main configurations. The first describes firms with relatively limited organizational structures that compensate for this limitation through high website quality and stronger online CSR disclosure. The second represents firms with greater organizational size that combine structural resources with digital and communication capabilities. The third identifies a pathway in which eco-innovation emerges from the combination of organizational structure, online CSR disclosure and online reputation, highlighting the strategic role of the latter. For the absence of eco-innovation, the solution has a consistency of 0.809 and coverage of 0.490 and identifies two configurations. One combines a large board with a limited membership base and the absence of online reputation; the other combines a large board with low website quality, weak online CSR disclosure and the absence of online reputation. Taken together, these patterns indicate that the simultaneous lack of digital, communication and reputational capabilities constitute a consistent pathway towards non-eco-innovation.

Discussion

The findings confirm equifinality: there is no single organizational route to eco-innovation, but rather several combinations capable of generating the outcome. Structural limitations can be compensated for by digital and communication capabilities, while in other firms organizational resources become effective when articulated with those capabilities. Online reputation becomes particularly relevant when combined with online CSR disclosure, suggesting that corporate sustainability depends not only on adopting environmental practices but also on making them visible and legitimizing them among stakeholders. The analysis also reveals causal asymmetry because the configurations associated with the absence of eco-innovation are not merely the reverse of the pathways explaining its presence. This result reinforces the usefulness of fsQCA for studying a phenomenon characterized by interdependencies, heterogeneity and causal complexity.

Contributions and Implications

The study contributes to the eco-innovation literature by jointly incorporating structural, governance, digital, communication and reputational factors into a configurational framework applied to the olive oil sector. Explicitly incorporating online reputation extends the analysis of eco-innovation determinants by adding a dimension of digital visibility and legitimacy. Methodologically, fsQCA identifies alternative combinations and shows that the meaning of a condition depends on the configurational context in which it appears. From a managerial perspective, the findings indicate that olive oil firms can strengthen their eco-innovation pathways by coherently developing the quality of their digital channels, the communication of CSR practices and the management of online reputation. For organizations with fewer structural resources, these capabilities may play a compensatory role; conversely, the joint absence of digital, communication and reputational capabilities is consistently associated with a lack of eco-innovation. The sustainable transition of the sector therefore requires organizational structure and digital communication and legitimacy capabilities to be considered jointly.

Keywords: Eco-innovation; online reputation; online CSR disclosure; fsQCA; olive oil sector

Theme(s): Technology, Digitalization, and Platform Cooperatives

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History and Current Landscape of the Ukrainian Cooperative Movement

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Abstract

While the cooperative movement has manifested in diverse forms across the world, its history in Ukraine holds particular significance. Shaped by the country's unique and often turbulent political and socio-economic landscape, the development of cooperatives in Ukraine has been intertwined with periods of imperial rule, struggles for national independence, Soviet domination, and the complexities of post-Soviet transition. This article explores the historical trajectory of cooperative movements in Ukraine, examining their origins and primary goals, their transformation, their resurgence and restructuring following Ukraine's independence in 1991, the various types of cooperatives that have existed and currently operate, the impact of major historical events on their development, their current state and contributions to the national economy, the key figures and organizations that have shaped their history, their overall social and economic significance in Ukrainian society and their current state and resilience during full-scale Russian aggression

This research explores the historical trajectory of cooperative movements in Ukraine. It provides an examination of the co-operative movements' origins and primary goals, and their transformation and function within the Soviet planned economy. Following this their resurgence and restructuring following Ukraine's independence in 1991 is discussed, as well as the various types of cooperatives that have existed and currently operate, the impact of major historical events on their development, and their current state and contributions to the national economy. This research reflects on the past in order to fully understand the present economic and social significance in Ukrainian society.

The methodological approach for this research was a semi-systematic literature review using different types of sources including different types of sources including peer-reviewed academic journals, historical encyclopedias, legal analyses, and reports from international organizations. The review prioritized literature that addresses both the historical theoretical foundations of the movement and contemporary institutional drivers in the post-independence agricultural sector.

The history of cooperative movements in Ukraine is a long and complex one, marked by periods of growth, suppression, and resurgence. From their emergence in the late 19th century as a response to socio-economic challenges and a tool for national awakening, Ukrainian cooperatives have navigated through imperial rule, the tumultuous years of independence and revolution, the oppressive Soviet era with its forced collectivization, and the complexities of post-Soviet transition and the ongoing conflict. Despite facing numerous obstacles, including political interference, economic instability, and the enduring legacy of distrust, cooperatives have consistently demonstrated their social and economic significance in Ukrainian society. They have served as vital instruments for empowerment, community building, and the assertion of national identity. Looking ahead, the cooperative movement in Ukraine holds considerable potential to contribute to the country's post-war recovery, foster sustainable development, and facilitate its integration into the European community, particularly in key sectors like agriculture, energy, and social services. By building on their rich history and adapting to the evolving challenges and opportunities, cooperatives can continue to play a crucial role in shaping a more resilient and equitable future for Ukraine.

This research has scholarly, practical, policy and social contributions. It makes a meaningful contribution by synthesizing a dispersed body of literature on Ukrainian cooperative history into a coherent narrative arc. By employing a semi-systematic literature review, it bridges historical and contemporary scholarship — something relatively underrepresented in English-language cooperative studies, which tend to focus on Western European or North American movements. It also contextualizes Ukrainian cooperatives within the

country's distinct political history, showing how imperial rule, Soviet collectivization, post-independence transition, and ongoing armed conflict have each shaped cooperative development in ways that differ substantially from cooperative trajectories elsewhere.

The research carries significant implications for post-war reconstruction planning. By demonstrating that cooperatives have historically served as instruments of community resilience and economic empowerment, it implicitly argues for their prioritization in Ukraine's recovery strategy — particularly in agriculture, energy, and social services. It also speaks to Ukraine's EU integration ambitions, as the cooperative model is well-established within European economic frameworks, suggesting that strengthening cooperatives could ease institutional alignment.

Perhaps most importantly, the research highlights how cooperatives in Ukraine have functioned beyond economics — as vehicles for national identity and grassroots solidarity. This insight is especially relevant given the current wartime context, where community cohesion is as critical as economic recovery.

Keywords: Ukraine, Co-operative movement, History, Current Landscape

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3. Sustainability, Social Innovation and Intercooperation

Research streams: Environmental and Social Sustainability in Cooperatives · Energy Cooperatives · Social Innovation, Community Development, and Civic Wealth Creation · Intercooperation and Networking among Cooperatives

22 contributions

Naturally Occurring Retirement Community Development: Senior community development through local action in the Canadian context

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Abstract

Naturally Occurring Retirement Communities (NORCs) have emerged as an important community-based response to the challenges associated with population aging. First described by Hunt and Gunter-Hunt (1986), NORCs refer to communities that were not originally designed for older adults but that, over time, have become home to a large proportion of seniors. More recently, the concept has expanded through Naturally Occurring Retirement Community Supportive Service Programs (NORC-SSPs), which connect residents with health, social, and community supports that enable aging in place. This study will expand the understanding of NORC's collaborative and relational nature building on Kloseck et al.'s (2010) work suggesting a social-relational connection as key to the NORC development. The literature is currently lacking information on the social, political and economic pressures associated with the NORC development process which would help to inform organizational ecology theory outlining the creativity, directional, delegation, coordination and collaboration stages for NORCs (Greiner, 1972; Strauss, 1974).. As a result, there remains a significant gap in understanding the social, organizational, and developmental processes that enable NORCs to emerge as viable alternatives to long-term care facilities in Canada.

The problem being addressed by this study is the lack of a detailed pathways for NORCs to develop and sustain their operations. Long-term care facilities across Canada struggle to meet the rising demand as the population ages and home care remains an underdeveloped sector as 40% personal support workers (PSWs) leave the sector within one year of graduating from a PSW program (Ontario Health Coalition, 2020). As a result, seniors have started to address their care needs through the development of NORCs, but little research has been done on how best to develop and govern these organizations.

This research will utilize the cooperative Antigonish Movement's study group format that developed cooperatives across Nova Scotia, Canada in the 1920s. The incorporation of social and concrete activities aids in developing a NORC while cooperative governance principles such as democratic member control aid in the sustainability of the NORC structure.

This study argues that NORCs should be understood not simply as geographic spaces but as collaborative and relational communities created through collective action. This research examines NORCs as evolving community organizations shaped by local leadership, social networks, and shared learning. The study draws upon community development perspectives to explore how NORCs progress through stages of formation, growth, coordination, and sustainability. Attention is given to the social, political, and economic pressures affecting community-led eldercare initiatives and the ways residents mobilize local resources to address their emerging care needs.

The Antigonish Movement was established in Antigonish, Nova Scotia by Drs. Moses Coady and Jimmy Tompkins. The framework presents as a Problem – Analysis – Visioning – Experiment approach that links community members with community development experts in formulating a path toward economic community development. In this study, the Antigonish Framework was adapted for use in developing a NORC relational community.

The research has five primary objectives. First, it seeks to assess the development approaches used by existing NORCs and identify common pathways leading to successful implementation. Second, it aims to design and implement a grassroots NORC through local participation and community ownership via the Antigonish Movement Framework. Third, the project examines governance systems currently used by

NORCs and explores how co-operative democratic structures contribute to organizational sustainability. Fourth, it seeks to develop educational pathways and learning resources that can assist communities interested in establishing NORCs. Finally, the study aims to contribute to theory by integrating insights from organizational ecology, cooperative governance, and participatory community development.

To address these objectives, the project employs a mixed qualitative and participatory research design. The first phase of the study focuses on sixteen existing Ambassador NORCs operating in Peterborough, Ontario. These Ambassador NORCs represent established NORCs and therefore provide a valuable opportunity to examine post-development organizational experiences. The Ambassador NORC development and structure focuses on self-help with limited external participation relying on online self-guidance documents for NORC development (NORC Innovation Centre, 2026).

The study used semi-structured interviews conducted with twelve participants, one from each Ambassador NORC. Interviews focused on the origins of the NORC, critical success factors, governance arrangements, decision-making processes, challenges encountered, relationships with external service providers, and strategies used to maintain member engagement.

Data collected from these interviews were analyzed to identify common themes and developmental patterns. Particular emphasis was placed on understanding how Ambassador NORCs emerge, how leadership develops, how governance structures evolve, and how communities adapt to changing resident needs. The findings will contribute to the development of a practical framework describing the life cycle of NORCs and the factors associated with organizational resilience. The framework will also provide insight into how NORCs navigate transitions from informal social networks to more formal organizational structures.

The second phase involves the implementation of a Grassroots NORC through the Antigonish Movement's Framework. Unlike current approaches that primarily rely on online resources with self-directed development guides, this grassroots intervention emphasizes direct interaction, collaborative learning, and collective problem solving. The Antigonish Movement, used study groups, adult education, and cooperative action to address local economic and social challenges. The Antigonish Movement demonstrated that education combined with collective action can empower communities to create sustainable institutions capable of addressing locally identified needs.

Within the Grassroots NORC intervention, older adults participated in educational activities, community discussions, social gatherings, and planning workshops designed to foster trust, social cohesion, and shared leadership. The project treats community development as both an educational and organizational process. Residents worked together to identify priorities, design governance structures, establish committees, and create operational procedures. Cooperative governance principles, including democratic member control, participation, transparency, and accountability, were incorporated into the development process. By emphasizing local ownership and active engagement, the project created a NORC model that is sustainable, adaptable, and responsive to the preferences of older adults.

Despite their promise, however, communities interested in developing NORCs often lack practical guidance regarding governance, leadership development, member participation, and organizational sustainability. Existing literature provides limited insight into how NORCs move from concept to operation or how they maintain momentum over time. Consequently, many communities face uncertainty when attempting to establish collective structures capable of supporting aging in place. By documenting developmental experiences across multiple NORCs and testing a grassroots implementation model based on cooperative approaches, this study addresses a critical knowledge gap within both the academic literature and community practice.

The anticipated contributions of the research include practical and theoretical outcomes. Practically, the project will generate evidence-based tools, governance resources, educational materials, and development frameworks that can be used by communities, policymakers, and practitioners. These resources will assist groups seeking to establish NORCs while reducing development time and avoiding common organizational

challenges. The findings may also inform policy discussions regarding community-centered eldercare and strategies that support aging in place.

Theoretically, the study contributes to scholarship on organizational ecology, community development, cooperative governance, and social innovation. By examining NORCs as evolving organizations with relational components rather than static service environments for seniors, the research expands understanding of how these NORC institutions emerge, adapt, and sustain themselves. The study also demonstrates how principles associated with the Antigonish Movement can be applied to contemporary aging challenges, highlighting the role of education, participation, and collective action in strengthening community resilience.

This research examines NORCs as more than housing arrangements or service delivery mechanisms. NORCs represent opportunities for older adults to exercise agency, build social connections, and collectively address shared challenges through cooperative actions. Through a combination of empirical investigation and practical experimentation, the project advances knowledge concerning the development, governance, and sustainability of NORCs in Canada. The resulting insights will support the expansion of cooperative community-led models of care that improve quality of life, strengthen local capacity, and contribute to more sustainable approaches to aging in place.

Keywords: Naturally Occurring Retirement Communities, Governance, Antigonish Movement, Cooperative Management, Aging in Place

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Critical Success Factors of Energy Communities: Toward a Conceptual Organizational Management Framework

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Abstract

Background

Energy communities (ECs) are increasingly recognized as key actors in the democratic energy transition, enabling citizens and local communities to jointly produce, consume, and govern renewable energy. Their organizational logic is hybrid, combining economic viability, social mission, environmental outcomes, and democratic governance at the intersection of social entrepreneurship and cooperative management (Defourny and Nyssens, 2010; Huybrechts and Mertens, 2014). Despite growing policy recognition under the EU Clean Energy Package, ECs remain underintegrated into mainstream management scholarship, and the internal organizational determinants of their success are poorly theorized.

The concept of critical success factors (CSFs), formalized by Rockart (1979) and developed by Leidecker and Bruno (1984), identifies the limited number of organizational areas in which satisfactory performance is essential to sustained success. A theoretically significant distinction separates perceived CSFs, reflecting managerial beliefs about success drivers, from actual CSFs, reflecting what empirically correlates with organizational performance (Grunert and Ellegaard, 1993). This distinction has not been applied to ECs, where democratic governance structures, member heterogeneity, and community embeddedness introduce dynamics that may amplify divergence between managerial beliefs and empirical performance drivers. Prior work established that classical business model frameworks are insufficient for ECs, proposing an alternative four-dimensional framework addressing community participation and democratic governance, social and environmental value propositions, multi-stakeholder engagement, and reinvestment strategies (Caban, 2025). The present paper extends this work by addressing which organizational factors actually determine EC success.

Aims

Building on this background, the paper pursues two aims: first, to propose a theoretically grounded CSF framework for ECs by systematizing internal organizational success determinants from existing management, cooperative, and energy transition literature; and second, to map these determinants onto the four-dimensional framework of Caban (2025), producing a structured conceptual model that integrates CSF methodology with EC-specific organizational theory as a foundation for subsequent empirical validation.

Methods

To pursue these aims, the paper employs a qualitative literature review drawing on peer-reviewed studies, policy documents, and empirical typologies from management science, cooperative studies, and energy transition research (Snyder, 2019). Sources are analysed through two lenses: the CSF methodology of Rockart (1979) and Grunert and Ellegaard (1993), which provides the analytical structure for classifying success-relevant factors, and the four-dimensional EC organizational framework of Caban (2025), which provides the domain structure into which identified CSFs are mapped. CSFs are classified along two axes: internal versus external, with the paper focusing on internal factors (Bullen and Rockart, 1981), and perceived versus actual (Grunert and Ellegaard, 1993). The resulting framework is designed for empirical validation through a forthcoming systematic literature review and a mixed-methods field study.

Results

This analysis produces a structured CSF catalogue for ECs, organized across three levels of analysis and mapped onto the four organizational dimensions. At each level, CSFs are classified as perceived or actual, enabling direct comparison between practitioner-reported success drivers and those supported by empirical evidence in the existing literature. The catalogue further distinguishes CSFs that are common across EC types and national contexts from those that are context-specific, with particular attention to early-stage EC markets such as Poland. On this basis, the paper identifies CSF clusters most likely to exhibit the perceived/actual divergence documented in the broader CSF literature, proposing these as priority targets for forthcoming empirical research.

Discussion

These results position EC success as fundamentally an organizational and social challenge rather than a technical or financial one. Governance, leadership, and relational dimensions foregrounded by the CSF analysis are precisely those that the EC literature has treated as background conditions rather than active management objects (Schreuer and Weismeier-Sammer, 2010). The Central and Eastern European context adds particular salience: post-socialist economies face a distinctive challenge in which cooperative social capital must be actively constructed rather than inherited (Błesznowski, 2014; Iliopoulos et al., 2022), making the perceived/actual CSF divergence likely to be especially pronounced and making governance formalization and leadership development especially critical.

Contributions and Implications

These findings carry several contributions and implications. The paper proposes the first CSF-based organizational framework for ECs, bridging cooperative management theory, CSF methodology, and energy transition studies, and it extends Caban's (2025) research from the adequacy of analytical tools to the organizational determinants of EC performance. For practitioners, it provides a structured diagnostic instrument for assessing organizational foundations. For policymakers, it identifies capacity-building priorities, including cooperative leadership development, governance formalization, and participatory process design, relevant to EU and national support programs. The framework is grounded in the Polish context but designed for comparative application across EU member states.

Keywords: energy cooperatives; critical success factors; cooperative governance; organizational management; energy transition

Theme(s): Cooperative Governance and Management; Energy Cooperatives

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Inter-cooperation, Networks and Innovation as Configurational Drivers of Social Enterprise Scaling: A Fuzzy-Set Qualitative Comparative Analysis of Spanish WISEs and SECs

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Abstract

Background. Research on Work Integration Social Enterprises (WISEs), and more recently on related organisational forms such as Spanish Special Employment Centres (SECs), has expanded considerably since the foundational comparative work of the EMES European Research Network, which established the institutional and organisational distinctiveness of WISE across Europe (Nyssens et al., 2004; Nyssens, 2007). Conceptualised as enterprises combining market-oriented activity with an explicit social mission, the labour market integration of individuals at risk of socal exclusion, WISEs occupy a structurally ambivalent position at the crossroads of market, public policy and civil society (Nyssens, 2007). In Spain, early comparative evidence highlighted WISEs as institutionally embedded organisations whose scaling depends heavily on regulatory frameworks and public procurement (Vidal & Claver, 2004), a dependency confirmed and updated in more recent country-level analyses (Díaz-Foncea et al., 2020). Despite this accumulated knowledge, the literature on WISEs' and SECs' growth determinants remains fragmented, predominantly variable-oriented, and has paid limited attention to the role of inter-cooperation as a driver of organisational growth. Despite the prominence accorded to this dimension in the ICA's sixth cooperative principle, its effects on organisational outcomes have rarely been examined systematically. A further limitation is the tendency to model these determinants symmetrically, assuming that the absence of a facilitating condition necessarily explains poor performance, an assumption that is poorly suited to the institutional complexity and causal heterogeneity characterising the social enterprise sector.

Objectives. This study pursues two interrelated objectives: to identify the configurations of conditions sufficient for the social and economic scaling of WISEs and SECs in Spain, and to assess the specific role of inter-cooperation with other social economy organisations within those configurations, determining whether its presence, absence or irrelevance varies across outcome dimensions and organisational profiles.

Methods. The study draws on a purpose-designed survey of 181 Spanish WISEs and SECs (2025–2026), representing approximately 21% of the registered population. Six conditions were included: organisational type (WISE or SEC), inter-cooperation with social economy organisations (IC), strategic networks (NET), professional and knowledge ecosystem base (BASE), innovation capacity (INNOV), listening attitude towards users and clients (ATT), and perceived public institutional support (PS). All continuous conditions were constructed as composite scores from Likert-scale items and calibrated onto a 0–1 fuzzy-set membership scale. Outcomes covered social scaling (SOC: social problem-solving, community transformation, hiring of at-risk individuals) and economic scaling (ECON: service diversification, quality improvement, economic performance, resource expansion). Four fsQCA models were estimated (high and low versions of each outcome). In accordance with Ragin's (2008) guidelines, a consistency threshold of 0.75 was set for the truth table evaluation. Furthermore, overall models were evaluated requiring a minimum consistency threshold of 0.80 and a coverage threshold of 0.50.

Results. The low-scaling models produced inadequate solutions, failing to identify consistent paths to poor performance, that itself is a substantive asymmetric finding suggesting that failure is driven by factors outside the model. The high-scaling models yielded strong, stable solutions. For social scaling (SOC), the intermediate solution reached consistency 0.964 and coverage 0.859 across six configurations; for

economic scaling (ECON), consistency was 0.906 and coverage 0.956, with an identical configurational structure. Innovation capacity (INNOV) appeared in positive form in five of six configurations for both outcomes, qualifying it as a near-necessary condition for scaling across organisational types. The most empirically powerful configuration (raw coverage 0.760 for SOC and 0.863 for ECON) combined strategic networks, listening attitude and innovation (NET·ATT·INNOV) without requiring inter-cooperation or institutional support. Inter-cooperation (IC) appeared as a positive condition in two configurations and as negated in a third, confirming the existence of both inter-cooperative and non-inter-cooperative pathways to scaling. Specifically, the presence of inter-cooperation (IC) covered 38.6% of the cases in social scaling (with consistencies of 0.980 and 0.987) and 46.0% in economic scaling (with consistencies of 0.986 and 0.994). Conversely, the absence of this feature (non-IC) covered only 8.0% of cases in social scaling (consistency of 1.000) and 9.9% of cases in economic scaling (consistency of 0.996). Public institutional support (PS) appeared negated in four of six configurations, and the professional ecosystem base (BASE) showed limited direct configurational relevance.

Discussion. Three substantive conclusions emerge. First, scaling is produced by combinations of conditions, not single dominant factors, validating the configurational approach and challenging variable-oriented models. Second, innovation capacity functions as the closest approximation to a universal enabler, present across virtually all sufficient paths. Third, inter-cooperation is neither necessary nor sufficient on its own but constitutes a positively associated element of multiple pathways, with its contribution concentrated in configurations involving strategic networks. The asymmetric failure of the low-scaling models reinforces that conditions enabling success do not simply reverse to produce failure. From the ICA's sixth principle perspective, formal inter-cooperation is systematically linked to better scaling outcomes, demonstrating that inter-cooperation serves not merely as an ideological commitment, but as an effective strategic leverage point when embedded within organizational networks.

Contributions and Implications. This study makes three contributions. Methodologically, it is among the first applications of fsQCA to scaling determinants in WISEs and SECs, demonstrating that its asymmetric configurational logic better fits the organisational complexity of this population than symmetric regression approaches. Substantively, it provides the first empirical assessment of the configurational role of inter-cooperation across both social and economic scaling dimensions, connecting cooperative normative principles to measurable organisational outcomes. Theoretically, it advances an understanding of scaling in which institutional support, networks and inter-cooperation interact conditionally rather than operate additively. For policy, fostering structured inter-cooperation among WISEs and SECs (through shared procurement, sector networks or federated arrangements) is likely to benefit precisely the organisations that currently under-activate this channel. For cooperative and SE federations, the study identifies which conditions most consistently accompany scaling and highlights institutional support and the professional ecosystem as insufficiently differentiated in the current sample.

Keywords: social enterprise scaling; inter-cooperation; fuzzy-set QCA; work integration social enterprises; cooperative principles

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Women-Led Social Innovation in Cooperatives: Territorial Development and Civic Wealth Creation in Iberoamerica

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Abstract

Social innovation within the Social and Solidarity Economy (SSE) has emerged as a critical driver of community development and territorial resilience, particularly in rural and semi-rural contexts marked by demographic decline, institutional voids and limited access to public services. The 'Ellas Transforman' project (Carrasco & Girardo, 2026) documented 24 biographical trajectories of women leading SSE organisations across six Hispano-American countries (Mexico, Argentina, Spain, Colombia, Ecuador and Costa Rica) revealing that women are not only participants in community-based economic development processes but their primary architects: the agents who design, sustain and continuously reinvent cooperative and associative alternatives rooted in their territories. Despite this evidence, the scholarship has not yet systematically connected women's cooperative leadership with territorial social innovation and civic wealth creation within a comparative Ibero-American framework.

This paper pursues three objectives. First, to synthesise the evidence on women-led social innovation produced by 'Ellas Transforman' within a community development and civic wealth creation framework. Second, to examine how the enabling conditions and barriers identified across 24 documented cases interact with established conditions for successful territorial innovation derived from the cooperative and social enterprise literature. Third, to derive implications for cooperative governance, rural development policy and the ICA's social innovation research agenda, with particular attention to the Global South.

The study employs a cross-case qualitative synthesis (Noblit & Hare, 1988; Barnett-Page & Thomas, 2009) drawing on the dataset produced by the OIBESCOOP 'Ellas Transforman' network: biographical profiles, photographic records and narrative accounts of 24 women SSE leaders collected through field observation, in-depth narrative interviews and participatory photography with informed consent (2025–2026). A civic wealth creation framework (Hess, 2013; Guinan & O'Neill, 2020) is applied to identify mechanisms through which women-led SSE initiatives generate non-extractive, community-anchored economic value. The framework understands civic wealth as the stock of assets (material, relational, cultural and institutional) held collectively by communities and managed democratically for public benefit, in contrast to privately extracted value that leaves no lasting territorial residue. Analysis proceeded through three stages: within-case description, cross-case thematic synthesis and theory-building around enabling conditions for women's cooperative leadership and social innovation.

The synthesis reveals four intersecting mechanisms through which women-led SSE cooperative organisations contribute to social innovation, community development and civic wealth creation. The first is adaptive institutional bricolage: women leaders systematically combine limited formal resources with deep territorial knowledge, social capital and cultural legitimacy to build organisations that fill institutional gaps left by markets and states in care, food sovereignty, credit access and environmental stewardship. This creative combination of scarce means, what the social innovation literature calls recombinant creativity (Murray, Caulier-Grice & Mulgan, 2010), is the central mechanism through which these organisations generate new social value without depending on capital-intensive inputs. The second mechanism is relational infrastructure: the women documented in 'Ellas Transforman' systematically construct networks of mutual support, intergenerational trust and inter-organisational solidarity that function as durable community assets, irreplaceable precisely because they are produced through

sustained social investment rather than financial transaction. The third is democratic economic governance: the cooperative and associative legal forms adopted by these women embed participatory decision-making and equitable benefit distribution into their organisational DNA, producing forms of civic wealth that are intrinsically non-extractive, place-anchored and resistant to financialisation. The fourth is territorial identity preservation: by valorising ancestral knowledge, artisanal heritage, agroecological practices and local cultural expression, these organisations generate a distinctive form of civic wealth that resists the homogenising pressures of globalisation and sustains the territorial distinctiveness on which long-term community resilience depends.

The convergence of evidence from six countries reveals a structural paradox: those most capable of generating sustainable social innovation and civic wealth in rural territories (women with deep community embeddedness, adaptive creativity and democratic governance competencies) remain the least recognised and least supported by existing public policy frameworks. Both the national cooperative legislation and the SSE promotion policies of the countries studied tend to privilege formal capitalisation, scale and productivity metrics over the relational depth, cultural legitimacy and adaptive capacity that the 'Ellas Transforman' evidence identifies as the actual drivers of territorial transformation. This finding challenges technology-centred and capital-intensive models of rural development and repositions women-led SSE organisations as the most cost-effective and structurally durable vehicles for community development and civic wealth creation available to cooperative policy.

This paper makes three contributions to the ICA research agenda on social innovation and community development. First, it advances a gender-sensitive civic wealth creation framework applicable to cooperative and SSE research across Global South and Global North contexts, extending the civic wealth creation literature beyond its predominantly Anglo-American institutional setting. Second, it identifies a set of transferable enabling conditions (territorial embeddedness, peer support networks, adaptive governance, and epistemic justice in the co-production of knowledge) derived from an independent empirical project in Iberoamerica, offering a robust evidence base for comparative cooperative policy design. Third, it argues that mainstreaming women's leadership in cooperative governance is not a peripheral equity concern but the structural precondition for the forms of social innovation and community development that the ICA's Cooperative Principle 7 (concern for community) envisions. For policymakers, the evidence calls for recognition, measurement and sustained public investment in women-led SSE organisations as primary agents of territorial social innovation and civic wealth creation, and for reform of the statistical frameworks that currently render their contributions invisible

Keywords: Social innovation; Civic wealth creation; Women-led cooperatives; Community development; Territorial resilience

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Advancing sustainability and performance reporting for cooperatives

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Abstract

Background

Cooperatives occupy a distinctive position in contemporary debates on sustainability, accountability and organizational performance. Their values and principles, together with their orientation towards member and community benefit, are closely aligned with prevailing approaches to sustainable value creation (Castilla-Polo & Gallardo-Vázquez, 2014). However, this alignment remains only partially reflected in mainstream reporting infrastructures. Sustainability standards, ESG ratings and conventional accounting measures have largely developed around investor-owned firms, in which capital providers are treated as the primary users of information (Fouché & Polo-Garrido, 2024; Olaizola-Alberdi et al., 2026). As a result, defining features of the cooperative model require more explicit recognition within existing reporting frameworks (Olaizola-Alberdi et al., 2026).

This representational challenge has become increasingly significant as the European sustainability reporting ecosystem shapes access to finance, supply-chain relationships, organizational legitimacy and strategic decision-making (Hummel & Jobst, 2024). Understanding how cooperatives respond to these developments therefore requires attention not only to the design of reporting standards, but also to the conditions under which reporting practices are adopted and institutionalized. Benvenuto et al. (2023) distinguish between institutional drivers, arising from regulatory, professional and broader societal pressures, and organizational drivers, linked to firm-specific characteristics, resources and strategic choices. Examining how these forces interact within cooperative contexts is essential for understanding how reporting practices emerge, acquire meaning and contribute to the assessment of sustainability and organizational performance.

Aims

The panel's main objective is to examine, in an integrated manner, how sustainability and performance reporting can reconcile cross-organizational comparability with the distinctive characteristics of the cooperative model. To address this objective, the six contributions are organized around three interrelated research questions.

RQ 1: How can generic sustainability and performance reporting frameworks be interpreted and adapted to reflect cooperative purpose, governance and value-creation processes?

RQ 2: How are reporting expectations adopted, translated and assessed across different institutional and organizational settings?

RQ 3: How can sustainability outcomes and financial performance be measured in ways that make the specific forms of value created and distributed by cooperatives more visible?

RQ 4: What are the reporting practices regarding alternative performance measures (APM) in the largest European dairy cooperatives and what conclusions can we draw about its potential to address the limitations of current GAAP?

Together, these questions provide a common analytical framework that connects the design of reporting standards with their implementation, evaluation and extension through complementary metrics.

Methods

The analysis begins with a cooperative reading of the EFRAG Voluntary Sustainability Reporting Standard for non-listed SMEs (VSME). This contribution identifies interpretive adjustments and additional data points across transversal, environmental, social and governance dimensions. These additions provide a basis for representing member participation, community commitment and shared value. The panel then follows reporting standards into organizational practice through a comparative mixed-method study of worker cooperatives in Italy and Spain, including fsQCA. This study examines how coercive, normative and mimetic pressures combine with organizational maturity to shape ESG communication during regulatory transition. Attention subsequently shifts from adoption to evaluation. The COOPESG'25 methodology is applied to the largest Spanish cooperatives by combining the quantity and quality of disclosure with alignment to the European Sustainability Reporting Standards. A matched comparison of large Spanish cooperatives and investor-owned firms extends the analysis to double materiality. It considers how organizations define material topics, describe their processes and connect materiality with future strategic priorities. The final part broadens the measurement architecture. An annual Italian pilot survey, involving approximately one hundred cooperatives, tests and refines a set of indicators that integrates ESG requirements with indicators of cooperative principles and societal contribution. In parallel, an empirical study of major European dairy cooperatives maps their use of alternative performance measures and assesses how these measures complement generally accepted accounting indicators.

Results

Taken together, the contributions point towards a layered accountability architecture for cooperatives. At the framework level, the VSME analysis shows that a common European reporting baseline can remain interoperable while incorporating data on cooperative identity elements. At the implementation level, the Italy-Spain comparison frames reporting adoption as an ecosystemic process that has been institutionalized. Regulatory requirements interact with professional norms, peer practices, federations and support organizations. Organizational maturity, in turn, shapes how these pressures combine and how cooperatives respond. At the evaluation level, COOPESG'25 provides an overview of Spain's largest cooperatives' sustainability commitments and performance, highlighting leaders and key areas for growth and improvement (AECA, 2022; Castilla-Polo et al., 2025). The double-materiality comparison complements this perspective by examining whether materiality processes express cooperative identity and stakeholder accountability or reproduce sectoral and institutional conventions. The two measurement studies further expand the scope of reporting and examine the behavior patterns of cooperatives with respect to specific frameworks. Preliminary evidence from the Italian survey provides initial insights into the potential of the indicators to capture differences across organizations and reflect the practical enactment of cooperative principles. The analysis of alternative performance measures identifies practices capable of explaining performance beyond profit-centered indicators. This is especially relevant where member transactions, collective benefit and value distribution shape reported outcomes (Polo-Garrido & Marí-Vidal, 2025).

Discussion

The combined evidence positions cooperative reporting as both an institutional arrangement and a strategic management practice. Standards define a shared language, while their organizational effects depend on how boards, managers, members, auditors, federations and policymakers interpret and use them. The contributions reveal a productive tension between comparability and distinctiveness. Common ESG architectures facilitate benchmarking and dialogue across organizational forms. Cooperative-specific

interpretations make, for example, democratic governance, distributional mechanisms or social embeddedness more visible. A layered model offers a practical way to manage this tension. A comparable core can be complemented by indicators and explanations linked to cooperative identity, stakeholder relationships and sectoral context. Within this model, rankings, materiality assessments, cooperative metrics and alternative performance measures operate as connected devices rather than isolated reporting tools.

Contributions and Implications

The panel contributes to sustainability and financial reporting research by linking framework design, implementation processes, disclosure assessment and performance measurement using the empirical context that gives us cooperativism. It also brings sustainability reporting and financial performance reporting into closer dialogue. This perspective moves the debate from whether cooperatives report towards what their reports represent, which institutional and organizational conditions shape them, and how reported information can support governance and sustainable transitions. For practitioners, the contributions provide practical guidance for adapting the VSME, selecting cooperative-specific indicators, strengthening materiality assessment processes, interpreting ESG rankings and communicating organizational performance through carefully designed alternative measures. For standard setters and public authorities, the panel brings greater visibility to a long-standing academic debate on the extent to which prevailing sustainability and performance reporting frameworks adequately reflect the distinctive purpose, governance structures and value-creation processes of cooperatives (Battaglia et al., 2015; Herbert, 2015; Novkovic, 2022; Costa et al., 2022; Fouché & Polo-Garrido, 2024; Olaizola-Alberdi et al., 2026). By consolidating this debate within a common analytical framework, the panel supports the development of proportionate and interoperable reporting approaches that preserve comparability while recognizing cooperative identity, stakeholder accountability and distinctive patterns of value distribution.

Keywords: Sustainability Accounting and Reporting; Cooperatives; ESG metrics; Double Materiality Assessment; Performance measurement; Identity

Theme(s): Environmental and Social Sustainability in Cooperatives; Measuring Impact and Performance of Cooperatives

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The Contribution of Cooperatives to the Social Sustainability of Employment. The spanish case

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Abstract

Background

Cooperatives constitute key agents for promoting quality employment, gender equality, and balanced territorial development, contributing to the reduction of inequalities and to social and economic sustainability (ILO, 2022; OECD, 2023). The literature suggests that cooperatives can contribute to greater resilience and labor stability (Borzaga et al., 2017), including the reduction of inequalities and social cohesion (Castro et al., 2020), compared to other corporate forms. However, empirical evidence shows that, following the Great Recession and in the context of successive crises, the Spanish labor market has experienced significant deterioration in working conditions, with high rates of temporary employment, part-time work, and precariousness (OECD, 2020).

Aims

This paper aims to analyze the socioeconomic impact of cooperativism in Spain, which is essential for understanding its contribution to social and territorial cohesion in the current context of high uncertainty. To this end, we conduct a quantitative study to assess the differential contribution of cooperatives to social and territorial cohesion. In particular, we focuss on the labour conditions of their employees, in comparison to those of workers from other corporate forms (public limited companies).

Methods

This study draws on the 2024 edition of Spain's Continuous Sample of Working Histories (CSWH), using 2023 data. The CSWH allows direct identification of cooperatives through the entity code prefix "F". A control group of equivalent corporations is constructed, matched by firm size and economic sector. The final sample of salaried employees in 2023 consists of 17,070 workers in the case of cooperative employment and 508,479 for the control group. The latter is composed of public limited companies (weighted to make them equivalent as stated) with the aim of obtaining an equivalent structure in terms of company size and sector of economic activity — key aspects from a business perspective in terms of working conditions. Once both groups were defined, the counterfactual analysis allows for the identification of differential behaviors in key dimensions of social and territorial cohesion. Parametric and non-parametric independence tests are used, with statistically significant differences defined as those with significance levels below 5%.

Results

Cooperatives demonstrate a superior capacity for integrating vulnerable groups. They employ a higher proportion of youth under 30 (23.2% vs. 21.6%) and women (54% vs. 49.9%) compared to the control group. Notably, cooperatives also employ a significantly higher percentage of low-skilled workers (48.3% vs. 34.9%), facilitating labor insertion for those with lower academic attainment. Territorially, 60.8% of cooperative employment is located in rural areas or small-to-medium cities, whereas traditional firms are concentrated in large urban centers (56.6%). This highlights the cooperative role in combatting rural depopulation.

In terms of labour conditions and trayectories, while cooperatives show lower part-time rates for women and youth, they face a challenge with contract types. Temporality is higher in cooperatives (22.6%) than in the control group (10.5%), and there is a high prevalence of fixed-discontinuous contracts (32.9% vs. 21.6%). However, analysis of labor trajectories from 2022 to 2024 reveals that cooperative workers actually experience greater overall stability, with a lower percentage of people experiencing unemployment episodes (15.2% vs. 20.4%) and longer continuous employment periods.

Cooperatives present a more egalitarian wage structure. Although average wages are lower than in traditional firms, the median wages are very similar (96.7% of the control group), indicating a narrower wage dispersion. Cooperatives limit high-end salaries (management) while providing better relative pay for low-skilled positions. Regarding gender, the "glass ceiling" appears more fragile; women have higher relative probabilities of reaching management positions in cooperatives, especially in later career stages. Additionally, the gender pay gap is lower in cooperatives (10.6%) compared to the control group (12.4%).

Discussion

The findings confirm that cooperatives act as vital levers for social and territorial impact, though they face specific paradoxes. The model's orientation toward people results in higher equity and inclusion, particularly for women and in rural environments. However, the high reliance on temporary and fixed-discontinuous contracts, while perhaps offering organizational flexibility, introduces a degree of contractual instability that contrasts with the actual stability observed in long-term labor trajectories. Furthermore, the inclusion of people with disabilities remains a significant area for improvement, as their presence in cooperatives does not exceed that of traditional firms.

Contributions and Implications

This study provides empirical evidence to guide public policy and corporate strategies toward more resilient economic models. A better understanding is provided of the specific contribution of cooperatives compared to other corporate forms in terms of labor market participation across different social groups, as well as in working conditions. Likewise, aspects that represent a challenge are identified.

Keywords: cooperatives; employment; inclusiveness; labor market; impact

Theme(s): Environmental and Social Sustainability in Cooperatives; Measuring Impact and Performance of Cooperatives

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Effects of Diversity and Inclusion on Well-Being in Agricultural Cooperatives: The Moderating Role of Female Leadership

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Abstract

Background

Cooperatives have increasingly been recognized as important organizational actors in inclusive and sustainable development, particularly because they combine economic objectives with social, democratic, and community-oriented principles. Their organizational model can contribute to reducing inequalities, strengthening collective participation, improving access to economic opportunities, and promoting social cohesion and member well-being. Unlike conventional organizations primarily oriented toward financial performance, cooperatives are characterized by a dual logic in which economic value creation is closely connected to collective and social objectives (Cornwall, 2003; Shore et al., 2011). Within this perspective, diversity and inclusion constitute important dimensions of cooperative governance because they influence members' participation, recognition, sense of belonging, and access to decision-making processes. In Morocco, agricultural cooperatives occupy a strategic position within rural development, the social and solidarity economy, and territorial development policies. They contribute to the valorization of local resources, employment creation, income generation, and the economic empowerment of rural populations, particularly women. Public development initiatives have further strengthened the role of cooperatives as mechanisms for social and economic inclusion. Nevertheless, the effective implementation of participatory governance remains uneven. Organizational constraints, unequal access to decision-making positions, limited managerial capabilities, and difficulties related to innovation and knowledge transfer may restrict the capacity of cooperatives to translate their social objectives into sustainable organizational practices (Elkachradi, 2025). The Marrakech-Safi region provides a particularly relevant empirical setting for examining these dynamics because of the diversity and importance of its agricultural cooperatives, including organizations operating in argan, olive, saffron, and organic agriculture. These cooperatives contribute to local value creation and rural inclusion while providing opportunities for women's economic empowerment. However, women's access to formal leadership and governance positions remains constrained by structural and sociocultural factors (Ibourk & Hninou, 2025). Against this background, the study addresses the following research question: to what extent do diversity and inclusion practices contribute to members' well-being in agricultural cooperatives, and how does female leadership moderate this relationship?

Aims

The primary objective of this study is to examine the relationship between diversity and inclusion practices and the well-being of members within agricultural cooperatives in the Marrakech-Safi region of Morocco. More specifically, the research seeks to identify the organizational mechanisms through which inclusive practices influence members' perceptions of recognition, belonging, participation, interpersonal relationships, and collective well-being. A second objective is to examine the moderating role of female leadership by analyzing whether the presence of women in decision-making and governance positions strengthens the positive effects of diversity and inclusion on organizational well-being. The study therefore aims to move beyond a purely demographic understanding of diversity by considering inclusion as an organizational process and female leadership as a potential governance mechanism capable of transforming diversity into positive organizational and social outcomes.

Methods

The study adopts a qualitative multiple-case research design focusing on agricultural cooperatives operating in different sectors of the Marrakech-Safi region, including argan, olive, saffron, and organic agriculture. This approach was selected because it enables an in-depth examination of organizational practices, leadership dynamics, and members' lived experiences within their specific institutional and territorial contexts. Data were collected through semi-structured interviews with cooperative members, women occupying leadership or decision-making positions, and relevant institutional stakeholders. The interviews explored perceptions of diversity, inclusion, participation, recognition, organizational relationships, leadership practices, and well-being. The analysis was conducted through thematic analysis, allowing recurring patterns and differences across the cases to be identified and interpreted. The conceptual framework combines three complementary perspectives. First, the diversity and inclusion literature emphasizes the importance of both demographic diversity and organizational practices that enable individuals to participate meaningfully and experience a sense of belonging (Shore et al., 2011). Second, the literature on occupational well-being highlights the relationship between organizational conditions, social relationships, employee experiences, and individual well-being (Danna & Griffin, 1999). Third, research on gender and leadership provides a framework for understanding how leadership styles, participation, and gendered organizational dynamics may influence governance and collective outcomes (Eagly & Carli, 2007). The analytical framework consequently considers diversity and inclusion as explanatory dimensions, well-being as the principal outcome, and female leadership as a moderating governance factor.

Results

The findings indicate that diversity and inclusion practices are associated with improved perceptions of well-being among cooperative members. Inclusive organizational environments appear to strengthen members' sense of belonging, recognition, interpersonal trust, participation, and social cohesion. Members who perceive that their contributions are valued and that they have opportunities to participate in collective decisions tend to report more positive experiences within their cooperatives. The findings also suggest that the effects of inclusion are not uniform across organizations but depend substantially on governance arrangements and leadership practices. Cooperatives characterized by more participatory decision-making mechanisms appear better able to translate diversity into collective benefits. In particular, the presence of women in leadership and decision-making positions emerges as an important moderating factor. In cooperatives where women exercise formal leadership responsibilities, inclusion practices tend to be more explicitly structured around participation, dialogue, recognition, and collective problem-solving. Female leaders also appear to contribute to strengthening interpersonal relationships and creating organizational conditions in which members can express their perspectives more freely. These findings suggest that female leadership does not simply constitute an outcome of inclusion but may also operate as an organizational mechanism that reinforces the positive relationship between inclusion and well-being. The findings are consistent with broader evidence concerning the contribution of cooperatives to women's economic and social empowerment, while also highlighting the importance of governance structures in determining the extent to which such potential is realized (Ibourk & Hninou, 2025).

Discussion

The findings reinforce the argument that the contribution of agricultural cooperatives to sustainable territorial development cannot be assessed exclusively through economic indicators. Their social performance also depends on the quality of organizational relationships, participatory governance, and members' experiences of inclusion and well-being. Diversity alone does not automatically generate positive organizational outcomes. Its effects depend on the existence of organizational mechanisms that transform demographic and social diversity into meaningful participation, recognition, and collective engagement. From this perspective, inclusion represents a critical organizational process through which diversity can become a source of social and organizational value. The moderating role identified for female leadership

further suggests that governance matters in explaining these effects. Women leaders may contribute to creating more participatory and relational forms of governance, although such effects should not be interpreted as inherent to women as a homogeneous category. Rather, the findings point to the importance of leadership practices, access to decision-making, and organizational conditions that enable diverse leadership perspectives to influence governance. At the same time, structural and sociocultural constraints continue to affect women's access to leadership positions and may limit the institutionalization of inclusive practices. The transformation of cooperative governance therefore requires not only individual leadership initiatives but also organizational and institutional mechanisms that support sustained participation and equal access to decision-making.

Contributions and Implications

This research contributes to the literature by bringing together four dimensions that are often examined separately: diversity, inclusion, well-being, and female leadership. By applying this integrated perspective to agricultural cooperatives in Marrakech-Safi, the study extends understanding of how organizational and governance mechanisms shape the social value generated by cooperative organizations. The study also contributes to research on responsible and inclusive management by demonstrating that the social performance of cooperatives is closely connected to the quality of their human and organizational dynamics. From a managerial perspective, the findings highlight the importance of formalizing inclusion practices, strengthening participatory decision-making mechanisms, developing leadership capacities among women, and establishing organizational processes that encourage recognition, dialogue, knowledge sharing, and collective learning. Institutional stakeholders could support these transformations through targeted training, leadership-development programs, governance mechanisms that facilitate women's participation, and initiatives promoting social innovation within cooperatives. More broadly, the findings suggest that strengthening women's leadership and inclusive governance can contribute to building agricultural cooperatives that are not only economically productive but also socially cohesive and oriented toward sustainable human development.

Keywords: Diversity; Inclusion; Well-being; Female leadership; Agricultural cooperatives

Theme(s): Environmental and Social Sustainability in Cooperatives; Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

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From Territorial Embeddedness to Territorial Responsibility: Rethinking Cooperatives in Times of Transition

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Abstract

Cooperatives are frequently considered particularly well equipped to address contemporary transitions because of their collective ownership, democratic governance, member orientation and historical embeddedness in local communities. Climate change, biodiversity loss, pressure on natural resources and growing inequalities nevertheless challenge this assumption. These transformations require enterprises not only to reduce their negative impacts or strengthen their social commitments, but also to take part in collective responses to problems that exceed organizational boundaries (Laurent, 2020). This raises a central question for cooperative research: under what conditions can the institutional specificities and territorial embeddedness of cooperatives become resources for collective territorial transformation?

The paper addresses this question through the concept of Corporate Territorial Responsibility (CTR). Introduced by Filippi (2024), the concept captures a shift from an individual conception of corporate responsibility towards a collective construction rooted in territorial needs and interdependencies, in which firms engage with public, private and civil-society actors in collective action and governance to address shared territorial challenges. CTR thus differs from territorially embedded Corporate Social Responsibility: territory is not merely the scale at which corporate responsibility is implemented, but a space of interdependence, cooperation and collective action.

Cooperatives are a particularly relevant organizational form through which to examine this shift. Their members are simultaneously users and owners, and their relationship with the cooperative is embedded in specific economic, social and often geographical contexts. Yet cooperatives remain enterprises operating under competitive constraints, facing tensions between economic performance, member interests, cooperative identity and broader social and environmental objectives. Growth, organizational complexity and increasing distance between members and decision-making structures may weaken the proximities on which cooperative distinctiveness has historically relied, as the risks of banalization and demutualization identified in cooperative research illustrate.

To address this tension, the paper distinguishes three analytical levels. Territorial embeddedness refers to the cooperative's insertion in localized relationships, resources and institutions through its members, activities and history. Territorial contribution concerns the economic, social and environmental effects the cooperative generates through employment, production, services, social relations or environmental practices. Territorial responsibility arises when the cooperative engages beyond its organizational boundaries with other territorial actors to identify, govern and address shared problems. Embeddedness may provide resources for responsibility but does not guarantee it, and positive territorial impacts do not necessarily imply participation in collective territorial action.

This distinction brings to light a tension specific to cooperatives. They are institutionally accountable primarily to their members, whereas territorial transitions involve a wider and more heterogeneous community of actors and interests. Member and territorial interests may converge, but such convergence cannot be assumed: transitions may require trade-offs between short-term member interests and longer-term collective benefits, and strategies benefiting members may generate externalities for other territorial actors. CTR therefore invites research not only on the territorial impacts of cooperatives, but also on how the boundaries of responsibility are negotiated and how cooperative governance interacts with broader territorial governance.

The paper develops this proposition through a conceptual and exploratory analysis bringing three bodies of work into dialogue. Cooperative research highlights both the potential of collective ownership and democratic governance and the tensions generated by growth, market competition and weakening member involvement (Spear, 2011; Bretos, Bouchard & Zevi, 2020; Bidet, Filippi & Richez-Battesti, 2023). Territorial and proximity approaches explain how geographical and organized proximities shape coordination, learning and collective action (Torre & Gallaud, 2022), while Ostrom's (1990) work on self-governing institutions shows that collective action over shared problems depends on rules crafted and enforced by the actors concerned. Finally, the capability approach provides the notion of conversion: resources do not translate automatically into agency, but depend on conversion factors that enable actors to transform them into individual and collective capabilities (Biggeri & Ferrannini, 2014; Tonon, 2018).

Mondragon is mobilized as a heuristic case rather than as evidence of an intrinsically responsible cooperative model. Its trajectory makes the three levels visible. Through intercooperation and the creation of financial, educational and technological institutions, its cooperatives took part in building a broader territorial ecosystem in the Basque Country (Whyte & Whyte, 1991). Conversely, internationalization through non-cooperative subsidiaries and the 2013 failure of Fagor Electrodomésticos raise the question of how embeddedness and responsibility can be maintained as organizational boundaries and geographical scales expand (Errasti et al., 2016; on degeneration and regeneration trajectories, see Bretos, Bouchard & Zevi, 2020). The case is used not as a systematic empirical test of CTR but to interrogate the conditions under which cooperative resources are converted into territorial collective-action capacities.

The central proposition is that cooperative specificities are institutional resources whose territorial significance depends on conversion factors. Collective ownership can support long-term relationships with members and territories; democratic governance provides experience of collective decision-making; proximity to members facilitates the identification of local needs and interdependencies. None of these is sufficient in itself. Conversion depends on institutional arrangements that enable cooperatives to articulate member interests with broader territorial challenges, establish shared commitments and participate in collective territorial governance with actors who neither own nor control the enterprise.

The paper thus shifts the research question from whether cooperatives are inherently territorially responsible organizations to the mechanisms through which their institutional specificities become resources for collective territorial action. For public policy, this means moving away from assumptions about cooperatives' inherent territorial virtues and focusing instead on the institutional and governance conditions that enable cooperation among enterprises, public authorities and civil-society organizations. In times of transition, the distinctive potential of cooperatives may lie less in territorial embeddedness itself than in their capacity to convert it into collective action addressing shared territorial challenges.

Keywords: Cooperatives; Corporate Territorial Responsibility; territorial development; collective action; transitions

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Metrics for the Cooperative Principles in the Valencian Community: Theoretical Validation of the Cooperative Indicators of the Socially Responsible Entities Register (SIR GVA)

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Abstract

Cooperatives are enterprises whose identity rests on the values and principles defined by the International Co-operative Alliance (ICA): voluntary and open membership, democratic member control, member economic participation, autonomy and independence, education, training and information, cooperation among cooperatives, and concern for the community. In the Valencian Community these principles have legal force under Article 3 of Legislative Decree 2/2015, which approves the consolidated text of the Valencian Cooperatives Law. However, Directive (EU) 2022/2464, the Corporate Sustainability Reporting Directive (CSRD), and the European Sustainability Reporting Standards (ESRS) that implement it were adopted without analysing their effects on cooperatives or whether they reflect their distinctive features. This creates a paradox within the social economy: cooperative business practices generate positive externalities and social value, yet they lack a standardised reporting framework within European sustainability legislation. As hybrid organisations that compete in the market while pursuing purposes beyond financial results (Billis, 2010), cooperatives fit the shift from "causing less harm" towards "doing more good" that hybrid organisations bring to corporate sustainability (Haigh & Hoffman, 2014). Generic indicators do not capture this contribution. For example, non-discrimination can be measured in any organisation, but its compulsory inclusion in the articles of association of a cooperative, derived from the principle of voluntary and open membership, adds no value in general reporting frameworks. In this context, the Valencian Register of Socially Responsible Entities (SIR GVA), regulated by Decree 200/2022 and amended by Decree 4/2025 and Order 5/2025, is a pioneering regional initiative in Spain that incorporates a sustainability reporting and performance system adapted to the voluntary European framework for small and medium-sized enterprises and unlisted companies.

The objective of this study is to carry out the theoretical validation of the cooperative-specific indicators proposed for the SIR GVA, providing a conceptual basis for the indicator system and assessing its suitability so that its validity can be tested empirically in subsequent research. The study forms part of a pre-doctoral project at IUDESCOOP and builds on a proposal presented at the CIRIEC-Spain National Congress (Valencia, 2024). The guiding research question was: what theoretical and methodological foundations does the scientific literature provide for defining specific indicators that enable the assessment of cooperative principles and their performance in relation to sustainability?

Methodologically, a structured review of theoretical and conceptual literature was conducted, applying a predefined procedure to formulate the question, identify sources, apply selection criteria, assess relevance and synthesise results. The search model defined cooperatives and hybrid organisations as the population; the measurement of cooperative principles and sustainability reporting in cooperatives as the phenomenon of interest; and the definition of specific indicators within sustainability reporting, particularly the SIR, as the context. Scopus was used as the primary database and Google Scholar as a supplementary source, with three search strings ("measurement of cooperative principles", "sustainability reporting in cooperatives" and "sustainability and hybrid organisations"), restricted to economics and business subject areas and to Spanish and English. The Scopus search returned 125 sources, of which 30 were selected and 25 retained after removing duplicates. A further 29 sources were added from Google Scholar, giving a total of 54, complemented by institutional sources such as the ICA and GRI. Sources were selected if they

analysed metrics for cooperative principles, linked cooperative principles with sustainability, or examined sustainability reporting in cooperatives.

The results classify the literature into four categories: 11 studies on hybrid organisations and sustainability, which conclude that cooperatives make a distinctive contribution; 11 studies linking cooperative principles and sustainability, many related to the Sustainable Development Goals (SDGs) and to the ICA-Americas Social Balance Sheet; 12 studies on sustainability reporting by cooperatives, which point to a disconnect between reported indicators and cooperative reality; and 10 studies on specific principles, particularly the first, third, sixth and seventh. The review of non-financial reporting shows that frameworks such as the CSRD and GRI may not reflect the specific needs of the cooperative sector (Olaizola-Alberdi & Bollain, 2025; Polo-Garrido et al., 2025). The COOPESG index assesses cooperative sustainability statements across 65 categories (Castilla-Polo et al., 2025), and its application to the 100 Spanish cooperatives with the highest turnover shows that 84.6% refer to their cooperative values and identity on their websites, but only 11% report a self-assessment of their adherence to cooperative principles (Castilla-Polo et al., 2026). The Social Balance Sheet for Cooperatives, developed by the ICA-Americas regional office, remains the most established instrument for reporting on the seven principles, and the cooperative identity assessment project proposes 127 indicators organised by principle and cooperative type (Mugarra, 2001). However, the original ICA model does not include the environmental dimension (Tisocco, 2023). On this basis, the proposed set for the SIR comprises two existing indicators, the non-discrimination declaration (SL13) and training hours (SL23), and ten new indicators: growth in membership; democratic election of governing bodies; universal access to information; the social profile of the cooperative; worker participation in governing bodies; redistribution of surpluses; worker participation in share capital; capital contributed by associated members as a measure of independence; inter-cooperation, measured through cooperative suppliers, second-degree integration and membership of representative bodies; and community social action.

The discussion shows that all the proposed indicators are reflected in the ICA Social Balance Sheet and are consistent with a regulatory framework for non-financial disclosure. Because the SIR follows the principle of sector agnosticism, which guarantees comparability across organisations, it can offer cooperatives a simpler and more accessible framework than the full Social Balance Sheet. Order 5/2025 has so far incorporated only the indicators directly related to internal governance. The authors argue that the scope of the seventh principle should be extended to environmental aspects that go beyond regulatory requirements, such as the circular economy, water resources and biodiversity, and to the territorial roots of cooperatives (Mozas et al., 2020; Von der Osten et al., 2025). From a legal perspective, the indicators must be assessed according to their nature, distinguishing between obligations arising from cooperative legislation, matters included in the articles of association, provisions that may be developed through internal regulations, and voluntary management or sustainability practices.

The main contribution is a theoretical framework based on four validation criteria: that the SIR indicators are reflected in the ICA Social Balance Sheet; that they express the cooperative model within a non-financial reporting framework; that they are differentiated according to their legal nature; and that the community dimension includes both social and environmental aspects. The implications are relevant for public policy, since the proposal does not seek to fragment the European framework but to enrich it, and could serve as an annex or complementary module within European sustainability reporting. It also gives cooperatives a tool to self-assess their identity. The main limitation is the theoretical nature of the validation, which should be followed by empirical testing of the indicators among Valencian cooperatives registered in the SIR.

Keywords: Sustainability reporting; CSRD Directive; cooperative principles; cooperative indicators; Register of Socially Responsible Entities

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Energy communities in cooperative form: an opportunity to empower consumers to lead the green transition in Europe

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Abstract

Background

The European Union's most recent environmental policy has set itself one of the greatest challenges of our time: tackling the climate emergency and promoting an energy model based on sources that are more sustainable than fossil fuels. Within this framework, the strategy of the so-called "Energy Union" pursues the essential objectives of ensuring energy that is affordable, secure, and sustainable.

In this context, energy communities have emerged as key actors in involving the active participation of consumers in the energy transition, as well as that of small and medium-sized enterprises and local authorities. From a legal perspective, one of the most significant issues is determining the most appropriate organizational structure through which these projects can be developed, given that energy communities constitute a new stakeholder in the energy market. Although the choice of legal form will depend on the participants involved and the specific characteristics of each initiative, the cooperative model stands out as one of the most suitable alternatives, as it is particularly consistent with the principles of democratic participation, collective management, and community benefit that support this model.

Aims

This study aims to analyze the legal framework established in Spain for the development of energy communities, with special attention to the possibility of structuring these initiatives as cooperatives. It will also examine the suitability of the cooperative model as a vehicle for achieving the objectives of energy communities, in line with the principles of democratic participation, collective management, and shared benefits.

Furthermore, the research will address the key legal, organizational, and economic challenges and obstacles that consumers, small and medium-sized enterprises (SMEs), and local authorities may face when choosing the cooperative model to launch and implement an energy community project. This analysis will allow for a critical assessment of how well the current regulatory framework suits these initiatives and what limitations may exist regarding their effective development within the context of the energy transition.

Methods

This issue must be examined from a legal perspective. Accordingly, it is necessary to analyse the European Union regulatory framework applicable to the matter, with particular emphasis on Directive (EU) 2018/2001 and Directive (EU) 2019/944, which promote the establishment of two distinct types of energy communities. It is also essential to examine the legislative measures adopted in Spain to transpose and implement these directives within the national legal system.

Results

Taken together, the cooperative values and principles and the characteristic features of energy communities, as introduced by Directives 2018/2001 and 2019/944, have allowed us to affirm that the cooperative form, although not the only possible option, is the ideal legal entity for structuring the energy community.

Furthermore, given the relatively recent regulation of energy communities across the Member States, this study will undertake a comparative analysis of the approaches adopted by selected jurisdictions, focusing on some of the most significant regulatory developments and best practices implemented at the national level.

Discussion

In recent years, in the Spanish legal system, significant progress has been made in regulating energy communities. The approved regulations have not specified any legal form. Based on this premise, our paper will focus on analysing the viability of cooperatives, particularly electricity consumer cooperatives, to establish energy communities, given their experience in the sector.

In recent years, the Spanish legal system has made significant progress in the regulation of energy communities. Nevertheless, the legislative framework adopted to date has deliberately refrained from prescribing a specific legal form through which these entities must be organised. Against this background, this paper aims to analyse the suitability of the cooperative model, and in particular electricity consumer cooperatives, as a vehicle for the establishment and operation of energy communities. Special attention will be paid to the experience accumulated by these cooperatives in the energy sector, their governance structure, and the extent to which their principles and objectives align with those underlying energy communities. Through this analysis, the study seeks to assess whether the cooperative form constitutes an effective legal and organisational framework for promoting citizen participation in the energy transition and achieving the objectives predicted by European and Spanish legislation.

Contributions and Implications

The study will conduct a comprehensive analysis of the Spanish legal framework for the creation of energy communities and will focus on:

(i) The analysis of the principles governing the creation of energy communities and their possible articulation through the cooperative form.

(ii) The suitability of associations and non-profit commercial companies as possible alternatives in the creation of energy communities.

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Keywords: Energy communities; legislation; cooperatives; consumers

Theme(s): Energy Cooperatives; Consumer Cooperatives

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Transformative Capacity in Hybrid Organisations: Comparative Rural Pathways from Greece

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Abstract

Background

Rural regions across Europe face persistent socio-economic and environmental challenges that require transformative, rather than incremental, responses. In this context the concept of transformative capacity emerged as a way to go beyond adaptation and resilience research, focusing instead on: the ability of actors (individuals, organisations, or systems) to actively reshape structures, institutions, and development pathways toward more sustainable and equitable outcomes. Hybrid organisations— such as co-operatives, social enterprises and informal networks—play a crucial role in addressing these challenges by combining market-based and mission-driven practices. Understanding how such organisations develop and sustain transformative capacity over time is essential for explaining their long-term survival and therewith impact on sustainable rural development.

Objectives

This study examines how hybrid organisations build and sustain transformative capacity across their organisational lifecycles. It aims to identify how resources, governance, and organisational forms interact over time to enable or constrain rural transformation. The paper compares two distinct organisational pathways in rural Greece. The study adopts a qualitative comparative case study approach, focusing on the Nileas Agricultural Co-operative in Messenia and the Vamos Network in Crete.

Methods

Data were collected through interviews, focus groups, participatory timeline exercises, and observation during fieldwork conducted in 2024. The analysis combines deductive and inductive qualitative content analysis, drawing on the Transformative Capacities Framework and the Co-operative Lifecycle Framework to interpret organisational development over time.

Results

The findings reveal two distinct pathways to rural transformation: Nileas represents a formal co-operative model rooted in collective market organisation, quality production, and democratic governance. Its transformative capacity is built through knowledge exchange, resource mobilisation, and institutional restructuring, particularly following a period of crisis that required governance reform and trust rebuilding. In contrast, the Vamos Network illustrates a place-based and network-oriented pathway centred on cultural heritage, agrotourism, and collaborative entrepreneurship. Its transformative capacity relies on social networks, local legitimacy, and the mobilisation of cultural and physical resources. Notably, transformation persisted even after the dissolution of its original formal organisational structure (cooperative), continuing through a looser network of actors. Both cases demonstrate that transformative capacity evolves over time and is shaped by lifecycle phases, including growth, crisis, dissolution or and renewal. However, they also highlight the fragility of such capacity, which remains contingent on governance quality, member commitment, and external pressures such as market volatility, climate change, and tourism dynamics.

Discussion

The comparison shows that transformative capacity is not tied to a chosen organisational model but emerges through different configurations of resources, skills, and institutional arrangements. While the Nileas case underscores the importance of formal governance and organisational repair, Vamos demonstrates how transformation can persist through organisational adaptation and network reconfiguration. Crisis plays a critical role in both cases, acting as a catalyst for either institutional restructuring or organisational migration. Contributions and Implications This study contributes to the literature by integrating the Transformative Capacities Framework with the Co-operative Lifecycle Framework, offering a dynamic perspective on how hybrid organisations evolve. It highlights that transformative capacity is an ongoing organisational accomplishment rather than a fixed attribute.

Contributions and Implications

The findings suggest that supporting rural transformation requires flexible institutional environments that neither hamper organisational stability nor their adaptive reconfiguration.

Keywords: co-operatives, hybrid organisations; transformative capacity; rural development; Greece

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A Hybrid Research Approach to Expand the Solidarity Economy through Civic Wealth and Public Policy

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Abstract

This paper publishes a distinctive new solution-oriented research methodology, which – through the research outcomes and the process itself – builds solidarity and civic wealth. Designed to strengthen cooperatives and expand their impact, the methodology has emerged empirically from eight years of research conducted by the International Cooperative Research Group (ICRG) primarily in low- and middle-income countries. The ICRG's hybrid research approach advances evidence to action through the critically important role of key stakeholder engagement with the research and data outcomes. It demonstrates how a practical, rigorous and engaged process supports the application of research findings at local and systemic levels, reflects the ethos of cooperatives, and aligns with the cooperative identity. This approach is grounded in the work of action research in the solidarity economy (from Lewin to Guzman-Luna et. al. 2022), drawing on theoretical frameworks in participatory action research, critical theory, and systems theory. It is also informed by more recent research for development approaches (for example, Marín-González, et. al, 2016 and Brunese et. al, 2024), which contrasts with action research that is very often focused on specific problems, in its aims to generate broader knowledge and insights that can inform and improve development practices on a larger scale and typically address complex development challenges, seeking outcomes to inform systemic solutions. The ICRG's framework fuses these research approaches through co-creation, local ownership, and rigorous data and analysis to advance evidence to action. Key stakeholders play a central role throughout the process, including problem identification, co-creation of research frameworks, feedback, reflection, analysis, outcomes application, and dissemination. The key is the intentional integration of engagement as part of the research design. The methodology has three major supporting pillars: (1) understanding cooperatives within the context of their cooperative ecosystem, other complex systems in which they operate, and their key stakeholders; (2) focusing on local ownership of research outcomes through intentional key stakeholder engagement; and (3) using the research process to support outcome application that strengthen cooperative development at the local, institutional and systems levels. The principal aim of this paper is to make available to other researchers this hybrid methodological approach that purposefully combines rigorous methods and intentional engagement and participation activities to (1) bridge from research to action and (2) build civic wealth both by its collaborative processes and the application of its data-based outcomes to address complex issues. In making this methodological approach available, the ICRG seeks also to mitigate the disconnect between research and application, thereby facilitating the translation of research evidence to action for civic wealth creation. Though not always linear in practice, the ICRG describes its methodology in four key phases, each of which embeds engagement: (1) research questions; (2) research design; (3) research implementation; and (4) research translation. The strength of this methodology is exemplified through the ICRG's *What Difference Do Cooperatives Make* (WDDCM) series, which we use in this paper to describe the process and illustrate its research translation. WDDCM is a multi-year, mixed methods comparative study that examined the hypothesized 'cooperative difference', if any, across sectors, offering a high-level synthesis of

its findings within national contexts. The important outcomes of the WDDCM research show that in each country studied (Kenya, Peru, Philippines, Poland, El Salvador, Guatemala, and Honduras), there is a measurable positive economic and social capital difference between cooperative members and the comparison group of those who are not cooperative members. The study's academically rigorous approach integrates action research, translating data into actionable policy and fostering engagement with policymakers, cooperative leaders, and other key stakeholders throughout the research process. Using this study as an example, the paper consolidates the ICRG's hybrid methodology for the first time, resulting in a framework that other researchers can adopt to help cooperatives drive social transformation across diverse regions, sectors, countries, and continents. The paper shifts the focus from the research findings themselves to the framework and processes that supported the uptake and application of the data, as evidenced by the internalization and local ownership of WDDCM research outcomes in various countries and regions. The primary contribution to cooperative research and practice intended by presenting the research approach is to support and expand the uptake of cooperatives and the solidarity economy, and to increase equity and opportunity at the local level. In providing this support, it should also bring greater focus to research-based outcomes that are locally owned and contextually sound to support local key stakeholders as they seek to address many of the complex systems and operational challenges faced by cooperatives. Our goal through this approach is not to provide a "one-size fits all" solution but to facilitate understanding of the contexts in which cooperatives operate, including the voices of their members and other key stakeholders, and to facilitate the interpretation and application of data to address locally identified needs and challenges in a manner that enhances civic wealth. The ICRG methodology can optimize the actionability of the research outcomes because the solutions will be shared solutions, the issues addressed will be important to the key stakeholders, and the emerging data-supported solutions will be appropriate to the local context. The ICRG's methodology fills a gap in research methods that seek to respond to complex challenges, particularly at a local level. The illustrations from the application of this methodology provide evidence of its effectiveness in moving from theory to practice, from research to application. If widely used, this research methodology has great potential to strengthen and increase the uptake of cooperatives – and beyond – and so also contribute to civic wealth, strengthen the solidarity economy, and aid scholars and researchers in making their academically rigorous research more accessible and applicable.

Keywords: Evidence translation; Civic Engagement; Cooperatives

Theme(s): Social Innovation, Community Development, and Civic Wealth Creation; Public Policy and Institutional Support for Cooperatives

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SESSION PROPOSAL

Workshop on transdisciplinary research on and with cooperatives

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Abstract

Motivation

An increasing number of funding schemes explicitly call for transdisciplinary approaches in their programs. This trend can be regarded as a positive development, as it enables practitioners to be fairly compensated and meaningfully involved, rather than being merely instrumentalized by academic research. Moreover, practitioners' knowledge is increasingly recognized and valued as a distinct and important form of expertise. Within the transition literature, it is widely emphasized that societal change is only achievable through the integration of diverse types of knowledge and methodological approaches.

At the same time, the growing institutional acceptance of participatory and transdisciplinary programs presents significant challenges. This requires researchers to take on new roles and acquire new methodological knowledge, which are rarely rewarded in the current academic system. Researchers often find themselves facing a significant additional workload that is not adequately recognized or compensated within existing academic systems.

Content of the Session

Against this backdrop, the session has two main objectives. First, it aims to provide researchers with an overview of the current state of transdisciplinary research, including a reflection on and discussion of key points of connection with cooperative research. We will examine various studies and provide an initial overview of transdisciplinary and participatory methods. Second, the session aims to create a safe space for scholarly exchange that enables participants to share and reflect on their experiences—with a particular focus on what has worked well and what has proven difficult or unsuccessful.

In the second part, we directly apply an important transdisciplinary method—Peer Consulting Circles. Peer Consulting Circles are a structured reflection method for small groups based on traditions such as action learning (Revans 1982) and systemic "reflection teams" (Andersen 1991). The core idea is simple but effective: Instead of immediately offering advice, participants first listen, ask clarifying questions, and then discuss the case among themselves while the person presenting the case remains silent. This creates critical distance, brings implicit assumptions to light, and allows new perspectives to emerge. The method is particularly effective for complex, practice-oriented challenges—such as working with cooperatives—where there are no simple solutions and learning stems more from shared experiences than from expert instructions. In our workshop, however, this method is intended to create space to discuss the research problems we encounter in our exchanges with practitioners and to find ways to solve them, thereby becoming better researchers.

Keywords: Transdisciplinary research; cooperatives; peer consulting circles; transdisciplinary methods; academic challenges

Theme(s): Environmental and Social Sustainability in Cooperatives; Social Innovation, Community Development, and Civic Wealth Creation

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Understanding Strategies of Sustainable Circular Economy in Cooperatives: A Literature Review

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Abstract

Background

The Circular Economy (CE) has attracted increasing attention from international institutions, public authorities, industry, and academia in recent years. The concept of CE is based on the premise of minimising waste and pollution, extending the useful life of products and materials, and regenerating natural systems. These premises lay the foundation for the principles available for CE – redesign, reproduction, reuse, and recycle (Ghisellini et al., 2016). In the EU, CE penetration has varied across industries. While the waste management, electrical and electronic equipment, and construction industries are rapidly adopting CE principles, industries such as mining and quarrying, health equipment, and entertainment and recreation have adopted CE more slowly (Mhatre et al., 2021). However, some voices have also been raised criticising certain unresolved aspects.

First, there is still no consensus on its clear definition and conceptualisation, which vary across sectors and actors involved, lacking a single universally accepted definition (Simamindra & Rajaonarivo, 2024). The absence of a theoretical conceptualisation makes it difficult to identify specific practices for proposal, capture, delivery, and value creation (i.e., supply chain management) that define the different circular business models. The most popular vision of CE is the technocratic one, which aims to decouple the economy from resource use through circular technologies (Ziegler et al., 2023). However, the scientific concept of CE is disorganised and encompasses various fields of knowledge (Korhonen et al., 2018).

The implementation of circular economy principles often requires new visions and strategies, as well as a fundamental redesign of product concepts, service offerings, and channels towards long-life solutions (Lewandowski, 2016). To successfully implement a circular business model, innovation is key, helping organisations overcome their challenges, realise their ambitions, and deliver efficient solutions across economic, environmental, and social dimensions.

Furthermore, the implementation of CE principles is recommended as a suitable solution for achieving sustainable development goals (Saidani et al., 2019). However, the relationship and contribution of CE to sustainable development (SD), and thus to a more sustainable society, are currently under discussion (Schöggl et al., 2020). Concerns have been raised regarding some purported CE practices promoted as sustainable that have detrimental impacts on the environment and society (Velenturf & Purnell, 2021). The various definitions show few explicit links between the concept of a CE and SD (Kirchherr et al., 2017).

Therefore, another critical aspect is determining whether the EC effectively contributes to sustainability or is limited to partial sustainability, focused solely on technical and economic efficiency (Corvellec et al., 2022). In fact, the similarities and differences between the two concepts remain ambiguous, and their relationship is not conclusively explained in the literature (Geissdoerfer et al., 2017). It has been mistakenly assumed that circularity automatically generates sustainable benefits, rather than conducting a rigorous assessment of the conditions, limits, tensions, and trade-offs among economic, environmental, social, and strategic dimensions.

Ferasso et al. (2020) suggest further conceptual and empirical analysis of the link between the CE and sustainability through quantitative evaluation of the sustainability performance of circular practices. Furthermore, it is necessary to investigate whether and how the transition to circularity makes companies

and their supply chains more sustainable, as well as how organisations consider their contexts when incorporating sustainability goals into their agendas.

Finally, criticism has also been levelled at the limited emphasis on the social contribution of the CE, an aspect that is less addressed in the technocentric approach. While CE emphasises process redesign and material recycling, which can contribute to more sustainable business models, it also entails significant limitations, such as the absence of the social dimension inherent in sustainable development, thus limiting its ethical dimensions (Murray et al., 2017). The primary objective of the CE is economic prosperity, followed by environmental quality, but its impact on social equity and future generations is barely mentioned (Kirchherr et al., 2017).

However, there is growing empirical evidence demonstrating that the CE can be implemented and scaled up, provides considerable environmental benefits, and aligns with societal values and priorities (Kirchherr et al., 2025). The social pillar of sustainability can be better addressed by integrating less recognised circular economy practices that apply the principles of strong sustainability (Simamindra & Rajaonarivo, 2024). In this sense, the transition to the social dimension of the CE requires integrating the social economy actors. Cooperatives are thus emerging as strategic actors that combine financial resilience, territorial roots, and local knowledge. In this way, they can contribute to integrating the circular economy into regional economies and circular societies (Ziegler et al., 2023), positioning cooperatives as key drivers of inclusive and sustainable rural economies (Martos-Pedrero et al., 2025).

Cooperatives are socio-economic entities because they pursue economic and social goals, generating benefits, directly or indirectly, depending on their operations and in accordance with the democratic decisions of their members. Therefore, cooperatives are businesses directly committed to sustainable development due to their dual nature. This is the main characteristic that makes them an ideal vehicle for achieving sustainability at all levels.

Aims

This work aims to provide a systematic review of the scientific literature to examine the theories, strategies, and underlying elements in the field of CE and sustainability in cooperatives. It seeks to identify essential factors, such as resource availability, financial support, and government policies, that are fundamental for the successful implementation of CE practices. In this way, it addresses one of the weaknesses identified in the circular economy literature: the tendency to rely on broad conceptual frameworks that lack precision regarding scope, actors, conflicts, and real-world implementation conditions.

Methods

A systematic literature review is conducted to advance knowledge of sustainable circular economy strategies in cooperative societies and examine the evolution of the research field. The analysis search was conducted in July and September 2026 and utilised the Scopus and Web of Science (WoS) databases. To identify the most relevant journals in the field of knowledge, the search is restricted to English-language scientific research articles. The results from both databases are combined, and duplicates are removed for the next step. Additionally, the titles, abstracts, and keywords of the selected articles are manually reviewed to ensure they meet the selection criteria and to exclude sources outside the field of business and management or that do not address the circular economy and cooperatives as primary topics.

Results and Contributions

Reviewing the strategies adopted by cooperative societies worldwide, based on experiences and case studies published in the scientific literature, allows for a deeper understanding of the link between CE principles and the sustainability of their activities. Special attention is paid to analysing the role these societies play in the social dimension inherent to sustainable development. Furthermore, given that most CE initiatives have been implemented at a *macro* level—that is, in cities or regions, or even at the national

level—the results provide additional *micro*-level evidence on the factors that determine the success of CE practices.

Keywords: circular economy; sustainability; cooperatives; literature review

Theme(s): Environmental and Social Sustainability in Cooperatives

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SESSION PROPOSAL

Media Cooperatives: Intercooperation and Networking in the Digital Era

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Abstract

The contemporary media ecosystem is undergoing a profound structural transformation driven by digitization, platformization, and shifting consumption patterns. These dynamics have disrupted traditional revenue models, intensified market concentration, and contributed to a growing crisis of trust, credibility, and intermediation in journalism. At the same time, the professional identity and working conditions of journalists are increasingly precarious, as boundaries between journalism and other forms of content production (e.g., influencers) become blurred.

Within this context, cooperative models are re-emerging as a potentially viable organizational and governance alternative for media systems. Rooted in principles of democratic participation, shared ownership, and social purpose, media cooperatives offer a normative promise: to reconcile economic sustainability with editorial independence, while reinforcing journalism's role as a democratic public good. However, this promise remains empirically and theoretically contested.

This session is motivated by the need to critically examine whether and how cooperative models can address the structural challenges facing the media industry in the digital age. The session is structured around six complementary contributions that collectively examine the role of cooperative models in contemporary media systems from managerial, sociological, and institutional perspectives that brings together an interdisciplinary (communication, law, management perspectives) and international (France, Italy, Portugal, Spain) panel of researchers.

An Approach to Cooperative Models in the News Media

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News media have lived their golden age during the 20th century: their proliferation and effects in public opinion have shaped a new kind of democratic society, dependant on their messages and their presence. Along this time, thinking about media has evolved from Mass Communication Research to Critical Media Theories, through Cultural and Media Studies, presenting very diverse origins and schools of thought. Media theory has studied the functions of news media as well as their role in the construction of social reality: some approaches have had a more functional focus, while others have looked at economical, political, social or linguistic aspects of news media. Today it is widely accepted that the emergence and evolution of mass media is probably one of the key factors that shaped our society for the last two centuries.

Technology has played a significant role in the development and features of news media, from the invention of the printing press, through the advent of radio and television, to digital desktop publishing software, digital photography, and the internet. The last decades have also witnessed a passing of the torch of the traditional gatekeeping function of news media to algorithmic solutions online. This has posed an existential debate about the role of the press in the 21st century that is often referred to as the "Bermuda Triangle": an out of control, industry-scale spread of disinformation, fake news and manipulated contents; an increase in citizen distrust towards the media; and a sharp reduction of ad revenue which brings difficulties in making business models work. At the same time, poor job conditions for journalists and an

increasingly blurred line between professional journalists and influencers and content creators also add to the crisis in the field, threatening news quality and the viability of the industry.

In this context, the main goal of this project is to study how news media companies integrate cooperative models into their management to help them adapt to digitalisation and technological transformation of the moment. More precisely, there are four specific objectives: first, to analyse how cooperative structures help manage the business part of these companies, from administration to finances; second, to evaluate how the social participation of partners impacts democratic governance and decision-making processes; third, to verify whether cooperative practices offer a way to alleviate the crisis of trustworthiness and intermediation experienced by the news media; and fourth, to identify the main barriers and difficulties of the media system in the face of technological challenges and structural transformation of the industry.

To respond to these objectives, the project deploys a qualitative, interdisciplinary approach (from the fields of Communication, Business Management, and Law), structured in three areas: first, a literature review of media and communication theories, the impact of digital transformation in the social function of news media and the development of their business models; second, the study of the internal administrative management of media in the Basque Country, financial management and participation of partners, through in-depth interviews; third, a survey study of how professionals in the field see both their role in contemporary society, and the relevance of cooperative models to confront the complexities of their task.

Results are still preliminary and incomplete, as the project is ongoing: the literature review is advanced and most data gathering has been done already, and the team is involved in processing and analysis of interviews and survey data. Some first results indicate that cooperation and collaboration have been a constant in the news media industry, even during the fiercest competitive times, and that the need to restart to others (to other companies in the same or similar fields; in complimentary fields; or to different kinds of stakeholders altogether) has been a pressing requirement for survival, especially for smaller agents. Not only from the management side, the shifting view of audiences toward active and supportive communities and the incorporation of readers and viewers into governance processes and editorial lines have also proved to be a strategy worth considering recovering at least part of the trust lost from citizens. However, some structural barriers have also arise, and the high costs of digitalisation and technology implementation, along with the often unfair competition posed by online platforms, algorithmic systems and now AI services, make it very difficult to survive for anyone but the biggest contenders in the field.

These first results already display the main tensions between the ideals of the social function of news media and cooperation strategies, and the structural reality of digital capitalism. Media companies have strong values that they try to materialize into their business models and daily practises, but this often collide with financial feasibility. However, this work contributes a reading of the current views of these tensions among Basque news media companies, and places it in the context of the historical development of news media, both from the perspective of its social function and its business models. Although the solution to the threefold credibility, disinformation, and business crisis of journalism and news media is far from identified, the project contributes some recent steps and attempts from the Basque media in that direction.

Keywords: News media; intermediation crisis; cooperative models; digital transformation

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Sociological Perspective on Cooperatives Ownership, Public Fundings and Media Power: the Italian Case

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The sociology of journalism has traditionally devoted considerable attention to professional autonomy, newsroom organization, media ownership and the relations between journalism, markets and political power, while paying comparatively limited attention to the specific potential of cooperative ownership. Recent work has sought to recover this neglected dimension by theorizing a "co-operative advantage" in news markets: the possibility that democratic ownership structures may alter the distribution of power within media organizations and thereby create conditions more favorable to journalistic independence, public-service orientations and pluralism (Diamantopoulos, 2025). This perspective is particularly relevant in the Italian case. In Italy, the social value attributed to journalism and the social value attributed to cooperative organization have historically intersected within public policy. The constitutional and legal rationale for public support to the press rests on the democratic importance of a plurality of information sources and on the role of journalism in enabling an informed public sphere (Allegri, 2012). At the same time, cooperative ownership has been treated by legislation as one of the organizational forms deserving specific support. The underlying assumption is therefore sociologically significant: a particular distribution of ownership and decision-making power is expected to contribute to a particular democratic function of the media. By selecting organizational forms and distributing resources, the state does not simply compensate for market failure; it helps define which institutional arrangements are recognized as socially valuable and capable of sustaining pluralism.

This contribution investigates that assumption by asking how the relationship between cooperative ownership, public funding and media pluralism has been constructed and transformed in Italy, and whether the legal form of the cooperative can still be considered an adequate proxy for the democratic functions that justify public support.

The analysis starts from a broader question concerning media power: under what conditions does cooperative ownership effectively redistribute power among capital owners, journalists and publics?. Research on media ownership and public-service news suggests that ownership arrangements provide institutional opportunities and constraints, but do not automatically determine editorial practices; organizational and professional logics may reinforce or counteract the effects expected from a particular ownership structure (Benson et al., 2018; Picard & van Weezel, 2008). This makes the Italian system a useful case for examining the gap between formal ownership arrangements and substantive control.

Methodologically, the presentation adopts a historical-institutional and sociological approach. First, it reconstructs the evolution of Italian legislation on direct support to the press, with particular attention to the changing position of journalistic cooperatives from Law No. 416/1981 through subsequent reforms and the reorganization of direct contributions in the 2010s. Second, it analyzes official documentation produced by the Department for Information and Publishing of the Presidency of the Council of Ministers, including eligibility rules, lists of beneficiaries and comparative material on European systems of press support. This allows the Italian model to be situated within a wider European context in which public intervention in journalism is not exceptional, although the instruments and eligibility criteria vary substantially across countries. Third, the paper compares selected subsidized Italian newspapers in order to distinguish legal cooperative status from substantive cooperative governance. The comparison considers, where documentary evidence is available, the ownership of the publishing company and newspaper title, the distribution of voting and decision-making rights, the role of journalists and workers in governance, links with external commercial actors, and the relationship between the formal beneficiary of public support and the wider economic structure in which the newspaper operates. Scientific literature is analytically distinguished from institutional and legal sources and from journalistic and stakeholder material, the latter being used primarily to identify controversies and cases requiring documentary verification.

The analysis produces two preliminary results. First, the Italian system reveals a long-term shift from generalized forms of support for publishing toward a more selective architecture in which the democratic rationale of pluralism is connected to categories of beneficiaries defined partly through their organizational and ownership characteristics. Cooperative status thus acquires a double meaning: it is both a legal form of enterprise and an institutional signal of the kind of independence and diffusion of power that public policy seeks to protect.

Second, this logic creates a potential mismatch between form and function. The democratic rationale of cooperative journalism rests on substantive characteristics such as participation, limits to the concentration of control, and the capacity of journalists or members to influence organizational decisions. Yet eligibility for public support necessarily operates through legally observable categories. As a consequence, formal cooperative arrangements may coexist with more complex commercial relationships or concentrated forms of effective control. The analytical problem is therefore not to classify newspapers normatively as “true” or “false” cooperatives, but to assess the degree of correspondence between legal status, effective governance and the democratic properties attributed to cooperative ownership.

These findings have implications for both the sociology of journalism and debates on media policy. From a sociological perspective, the cooperative should be understood not simply as an alternative business model but as an institutional arrangement for organizing power. Its distinctive promise lies in changing who can exercise control over the production of information and in limiting the separation between those who produce journalism and those who own the organization. This helps explain why the values associated with journalism and cooperation can converge: both are normatively connected to participation, pluralism, accountability and the containment of concentrated power. At the same time, the Italian case demonstrates why organizational form cannot be equated with democratic outcome. The central issue becomes the institutional strength of cooperative logics and their capacity to resist competing commercial, managerial or political logics.

The paper therefore reframes the policy question. Rather than asking only whether public subsidies to newspapers should be maintained or abolished, it asks what exactly public policy intends to support when it privileges cooperative or non-profit forms. If the rationale is democratic pluralism, the relevant distinction may increasingly be between formal cooperative status and substantive democratic governance. This opens two possible directions for reform: changing cooperative requirements themselves, or redesigning press-support criteria so that eligibility reflects demonstrable characteristics of governance, effective control and editorial independence rather than legal form alone. The contribution does not assume that either solution is preferable. Instead, it proposes a sociological framework for evaluating how different institutional designs distribute power within journalism and how public intervention can support pluralism without treating ownership form as an automatic guarantee of democratic performance.

Keywords: Media cooperatives; Media ownership; Public funding; Media pluralism; Sociology of journalism

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Cooperatives and the challenges of mass media in the digital age: Portuguese perspective

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Digitalisation has profoundly transformed media business models, intensifying economic pressures on news organisations. The widespread availability of free online content, coupled with the growing convergence between journalism and digital influencing, has contributed to the erosion of journalists' professional status and increasing job insecurity. Against this backdrop, and in a context marked by media ownership concentration, cooperatives have emerged as a potential alternative for the organisation of journalistic activity. Given journalism's intrinsic connection to freedom of expression, media pluralism and the formation of public opinion, this article examines whether the cooperative model offers a suitable legal framework for the exercise of journalism in Portugal. It assesses its capacity to provide an alternative to conventional corporate forms regulated by the Portuguese Companies Code and analyses whether the status of journalist-members may contribute to reducing precarity and strengthening professional independence.

This study adopts a legal-dogmatic methodology based on legal scholarship, case law, and official statistical data, using the general cooperative legal framework to assess journalism cooperatives.

In Portugal, only a relatively small proportion of media organisations are cooperatives: only 99 among 1,438 entities holding media ownership titles. Although most are active in radio broadcasting (43), cooperatives are also present in press publishing (20), demonstrating that the model remains relevant within different segments of the communications sector. Cooperatives engaged in media-related activities are classified within the cultural sector and are subject to the Cooperative Code (Código Cooperativo, CCoop), enacted by Law No. 119/2015, together with the specific legal framework established by Decree-Law No. 313/81 of 19 November.

The definition of cooperatives (Article 2.º CCoop) embodies the cooperative's mutualistic character, which is directed towards the fulfilment of members' needs and thus clearly distinguishes the economic activity of cooperatives from the profit-oriented purpose that underlies commercial companies (Namorado, 2000, 2005; Meira, 2009; Meira & Ramos, 2015).

Cooperatives are governed by the principles of voluntary and open membership, democratic member control, member economic participation, autonomy and independence, education, training and information, cooperation among cooperatives, and concern for the community (Article 3.º of the CCoop). Democratic governance is particularly noteworthy. In first-degree cooperatives, the general rule is that of "one member, one vote" (Article 40.º of the CCoop), whereby each member's voting power is independent of the amount of capital contributed. This stands in sharp contrast to private limited liability companies and public limited companies, in which voting rights are generally tied to the extent of each member's or shareholder's capital participation (Articles 250.º and 384.º of the CSC, respectively). By dissociating economic power from decision-making power, the cooperative model offers a potentially significant institutional alternative to conventional corporate structures in the organisation of journalistic enterprises, making them comparatively less vulnerable to investor-driven economic influence.

The requirement that members contribute both capital and work (Articles 5.º and 6.º Decree-Law No. 313/81) enables media professionals to participate democratically in ownership and governance, without decision-making power being tied to capital concentration. By dissociating corporate control from financial investment, the cooperative model has the potential to reduce the exposure of editorial and journalistic decisions to external economic pressures, while fostering conditions conducive to the effective exercise of the fundamental rights guaranteed to journalists under the Journalists' Statute (Law No. 1/99 0f 13

January) and the Press Law (Law No. 2/99 of 13), notably freedom of expression and creative freedom, professional independence, and participation in shaping the editorial direction of the media organisation.

The amendments introduced to the legal regime governing cooperatives in 2015 were intended to increase the attractiveness of the cooperative model by introducing greater flexibility into their organisational and governance structures, thereby enhancing their sustainability while preserving the principles that underpin the cooperative identity (Meira & Ramos, 2016).

A further factor that may undermine both the independence and the quality of journalism concerns the professional status of journalists themselves. Research shows that employment precariousness directly affects not only journalists' job satisfaction but also the quality of their professional output (Quintanilha, Cardoso & Paisana, 2020; Araújo, 2025). It is therefore important to assess whether the legal and employment status of journalist-members within cooperatives renders the cooperative model particularly suitable for addressing the challenges of the digital age in the mass media sector.

The corporate object of cultural cooperatives may be pursued through members' labour alone or with the involvement of non-members. This analysis focuses on the relationship between the cooperative and its members, as the latter raises no specific legal issues.

As is the case with cooperatives in other sectors, admission as an individual member of a cultural cooperative presupposes a minimum capital contribution and participation in its productive activity. This arrangement raises the question whether a cooperative member should be regarded as an employee and, accordingly, be subject to Labour Law protections. The issue arises because, as a member, the individual participates in forming the cooperative's will and exercises governance powers traditionally associated with the employer, seemingly excluding classification as an employee within a relationship of legal subordination.

Portuguese doctrine remains divided on the legal nature of the relationship between the worker-member and the cooperative. While some scholars argue that the relationship between the worker-member and the cooperative is based upon a single legal relationship, embodied in a mixed contract commonly referred to as an *acordo de trabalho associado* or *acordo de cooperação laboral* ou *acordo de trabalho cooperativo* (Leite, 1994; Martins, 2019; Meira & Fernandes, 2023), others admit the coexistence of cooperative membership and an employment contract where the factual circumstances disclose subordinate employment (Gomes, 2007; Carvalho, 2012).

Judicial decisions also diverge. Some recognise the compatibility between cooperative membership and employee status, treating them as distinct legal relationships. Others regard them as incompatible, characterising the link between the worker-member and the cooperative as a cooperative work agreement. Notably, the Guimarães Court of Appeal (17 March 2022, Case No. 6692/19.0T8BRG.G1) held that, although the relationship is in principle one of cooperative work, where membership depends on labour provision, membership and employee status are not inherently incompatible, particularly where the employment relationship predates membership and the parties intended its continuation. This view is reinforced by the legal regime of cultural cooperatives, which expressly contemplates members ineligible for election to cooperative bodies if they had worked for the cooperative for more than one year before becoming members (Article 10.º of Decree-Law No. 313/81).

The position defended in this article adopts a middle-ground approach, grounded in the principle that the legal characterisation of a relationship depends on its substantive reality rather than its formal designation. While the relationship between a worker-member and a cooperative is, in principle, not an employment one, it may nonetheless fall within labour law where the cooperative exercises powers of direction and discipline comparable to subordinate employment. The primacy of substance over form is particularly relevant where the cooperative serves as a fraudulent device or where, despite its legitimate constitution, the worker-member lacks any real capacity to influence cooperative life, whether because of its organisational scale or exclusion from its governing bodies (cf. Article 10.º of Decree-Law No. 313/81).

The ambiguity surrounding the labour-law status of worker-members is also evident in social protection. The Portuguese Contributory Schemes Code allows cooperatives to opt for the inclusion of worker-members in the social security regime for self-employed workers (Article 135.º). Failing such option, worker-members are covered by the regime applicable to employees of non-profit organisations (Articles 110.º-112.º).

These legal classification challenges are unlikely, in themselves, to deter the establishment of cooperatives within the mass media sector. First, they do not give rise to a greater degree of legal uncertainty than that encountered in traditional corporate forms of business organisation. Secondly, the organisational and governance features of cooperatives may provide media professionals with greater editorial autonomy, thereby fostering conditions that are more conducive to the independent exercise of journalism.

We conclude that the cooperative structure does not automatically guarantee journalistic independence, but it may create institutional conditions conducive to safeguarding it.

The participation of journalists in the cooperative's governing bodies contributes to greater employment stability and professional satisfaction among these professionals, although doctrinal disagreement persists as to their classification under labour law.

Keywords: Cooperatives; journalists; labour framework; Portugal

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The cooperative model as a proposal to address the challenges of mass media in the digital age

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Mass media in the digital age combine the news media sector and the audiovisual sector (European Parliament, 2021). However, to understand the challenges facing mass media in the digital age, the analysis must first focus on the definition of a journalist, as it is the journalist who informs, regardless of the media used to do so.

Thus, a journalist is an individual who observes, describes, documents, investigates and analyses events, statements, policies and any proposals that could affect society, with the purpose of systematising such information and gathering and analysing facts to inform, both online and offline, segments of society or society as a whole (European Parliament, 2023).

Furthermore, the act of informing is linked to one of the basic principles of journalism: the search for truth. For this reason, this research argues that only media outlets composed of journalists should be considered mass media.

Consequently, mass media, through journalists, play an essential role in promoting and safeguarding democratic values, human rights, and fundamental freedoms. Democracy cannot function without available and accessible trustworthy information both online and offline, highlighting the importance of preserving the fundamental right of any citizen to be informed (European Parliament, 2023).

However, the so-called revolution of sources, consisting in the fact that anyone, anywhere, can communicate information, whether true or false, through social networks, means that disinformation and misinformation can have severe consequences for the protection of human rights and present a significant threat to the values of democracy and individual freedoms.

Likewise, the environment in which journalists in Europe operate is becoming increasingly hostile, which poses a threat to citizens' right to reliable, pluralist and independent information. Journalists also face

deplorable working conditions in most EU Member States (European Economic and Social Committee, 2026). Job precariousness favors neither the ethics nor the independence of communication professionals (García-Salas, 2026).

Therefore, to ensure quality journalism, it is necessary to guarantee safe and suitable working conditions for journalists (European Parliament, 2023).

For all these reasons, the objective of this research is to demonstrate how the cooperative model aligns with the definition, function, and needs of mass media in the digital age. It seeks to harmonize cooperative principles with two key pillars:

a) The fundamental role of the journalism sector in fostering resilience and inclusivity within our democratic societies, as well as promoting cultural diversity and pluralism (Barraquero Carretero & Sánchez Moncada, 2018).

b) The improvement of working conditions for journalists as a prerequisite for high-quality journalism, grounded in independence and truthful information.

To achieve this objective, the research relies on various legal methods, such as the descriptive method—based on the analysis of different regulations and literature—and the prescriptive (or policy-proposal) method, which seeks to identify existing problems and subsequently propose solutions.

Among the most notable results of the research are the improved working conditions offered to journalists by the cooperative model and the greater independence and news quality of mass media organized under the cooperative model.

However, it is necessary to discuss, primarily, the most suitable cooperative structure (Camps-Durban, 2023a), the specific features of digital journalism as factors shaping the cooperative model (Arrieta Idiakez, 2019), how to secure financing while maintaining the independence of the cooperative (Martínez-Sánchez & Martínez-Polo, 2017), and alternatives for competing in the market (Camps-Durban, 2023b).

Finally, the main contribution of this research consists in offering the necessary guidelines to promote mass media cooperatives.

Keywords: Mass media; journalists; cooperative model; digitalization; democracy; working conditions

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Ouest Médialab: A Non-profit Innovation Intermediary in the French Media Ecosystem

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The French media sector is undergoing profound transformation driven by digital technologies, data, artificial intelligence, and changing business models. While technological innovation has accelerated, many media organisations -particularly local and regional outlets- struggle to appropriate new tools and practices because of financial, organisational, and skills constraints. Traditional market-based responses, such as consultancy services or technology providers, often fail to support sustained organisational learning or collaboration. This context has created opportunities for new forms of innovation intermediaries that facilitate knowledge exchange, experimentation, and collective capacity building. This paper examines Ouest Médialab (OML), a French non-profit organisation operating within the Social and Solidarity Economy (SSE), as an example of such an intermediary.

This paper analyses how Ouest Médialab contributes to media innovation by acting as a non-profit innovation intermediary. It seeks to demonstrate how its organisational model, governance, and ecosystem enable cooperation among otherwise competing actors while supporting the adoption of digital innovations. More broadly, the paper explores the contribution of SSE organisations to innovation ecosystems in sectors characterised by rapid technological change.

The study adopts a qualitative case-study approach. Ouest Médialab is analysed through organisational documents, archival material, strategic reports, communication documents, collected over its twelve-year development and recent interviews of diverse stakholders. The analysis draws on the literature on innovation intermediaries, boundary-spanning organisations, innovation ecosystems, and the SSE to interpret the organisation's role within the French media landscape.

The findings show that Ouest Médialab performs several complementary intermediary functions. First, it acts as a knowledge broker by monitoring emerging technologies, synthesising information, and disseminating practical knowledge to media professionals. Second, it translates between technological, journalistic, academic, and institutional communities, reducing barriers between actors with different professional languages and objectives. Third, it strengthens innovation capabilities through training, experimentation, mentoring, and collaborative projects. Finally, it facilitates collective learning by creating neutral spaces where competitors, researchers, students, technology firms, and public institutions can jointly explore new approaches.

Rather than producing media content or commercial technologies, OML functions as an intangible innovation infrastructure that enables continuous learning across the regional (and national) media ecosystem. Its non-profit status reinforces its legitimacy by fostering trust, neutrality, and collaboration rather than commercial competition. The organisation's hybrid governance and multi-stakeholder membership allow it to maintain strong territorial roots while remaining connected to national developments in media innovation. As artificial intelligence increasingly reshapes journalism and media production, OML continues to adapt its activities to support responsible technological appropriation across the sector.

The case illustrates how innovation increasingly depends not only on technological capabilities but also on organisations capable of connecting actors, facilitating collaboration, and building collective learning processes. Ouest Médialab demonstrates that non-profit innovation intermediaries can reduce cognitive, organisational, and institutional distances between heterogeneous stakeholders while encouraging cooperation within otherwise competitive environments. The study therefore extends existing research on innovation intermediaries by highlighting the distinctive contribution of SSE organisations, whose mission-driven governance provides conditions of trust and neutrality that commercial intermediaries may struggle to achieve.

This paper contributes to the literature on innovation intermediaries by integrating perspectives from innovation ecosystem research and the SSE. It proposes Ouest Médialab as a model of a non-profit innovation intermediary that combines knowledge brokerage, capacity building, boundary spanning, and ecosystem coordination. The findings suggest that similar organisations could play an increasingly important role in supporting digital transformation across other knowledge-intensive sectors facing rapid technological disruption. For policymakers, the study highlights the value of supporting intermediary organisations that strengthen collective innovation capabilities rather than focusing exclusively on technological investments or individual firms.

Keywords: Innovation intermediaries; media innovation; social and solidarity economy; innovation ecosystems; digital transformation

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Value creation in Journalistic Cooperatives: Business Model Dynamics and Intercooperation

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Journalism is currently undergoing a profound structural crisis characterized by intense financial turbulence, deteriorating public trust, and an acute erosion of traditional commercial business models. In response to market failures and the commercial imperatives of investor-owned media firms, the social and solidarity economy has increasingly emerged as a vital incubator for non-profit and democratic news enterprises (Arévalo, Al Najjar & Vilar, 2020; Barranquero & Sánchez, 2018). Among these alternative organizational structures, journalistic cooperatives represent a unique yet academically understudied phenomenon within contemporary media ecosystems (Diamantopoulos, 2025). Although worker and consumer media cooperatives possess deep historical roots, the sector has experienced a contemporary revitalization driven by displaced media workers, social movements, and civic initiatives aiming to rescue failing news outlets or construct independent alternatives (Barranquero & Meda, 2015).

Theoretical frameworks outline a distinct "cooperative advantage" consisting of six core capabilities: responsiveness to market failures in news desert regions, enhanced reader trust rooted in transparent democratic governance, effective mobilization of human capital through intrinsic motivation, activation of community social capital, organizational loyalty fostered by movement principles such as "one member, one vote," and the prioritized generation of social value over short-term profit maximization (Diamantopoulos, 2025). However, media cooperatives also face operational and environmental challenges, including heavy reliance on public subsidies, digital divide barriers among target audiences, competitive dilemmas within capitalist markets, and the risk of isomorphic or degenerative pressures that threaten to compromise their democratic identity (Diamantopoulos, 2025; Papadopoulou, 2026). Although news cooperatives offer distinct advantages, media scholars have historically neglected them in favor of traditional corporate structures. In addition, collaboration can be important in social economy organizations (Etxezarreta et al., 2025), and in cooperatives in actual media ecosystems (Hatcher & Thayer, 2017). By sharing resources, infrastructure, and knowledge, journalistic cooperatives can counter the scale economies favoring large conglomerates, ensuring collective economic viability and fostering structural pluralism and democratic vitality (Diamantopoulos, 2025). For instance, networking is central to collaborative journalism, enabling cross-newsroom resource pooling (Barranquero & Meda, 2015) and information sharing through digital platforms to enhance transparency and innovation (Danso et al., 2024). Additionally, digital "distributed communication" connects journalists and citizen reporters for real-time, cross-border coverage of global issues (Barranquero & Meda, 2015). Ultimately, these collaborative

networks can empower cooperatives and communities against dominant news actors, turning isolated efforts into a robust and sustainable sector (Diamantopoulos, 2025).

Despite the proliferation of new journalistic cooperatives, there is a gap in knowledge, as it is not fully understood how cooperative create value (Diamantopoulos, 2025) and how they establish collaborative networks. Against this background, the primary objective of this study is to examine how journalistic cooperatives create, deliver, and capture value and, second, how creating networks, and collaborative partnerships help to ensure their sustainability. Specifically, the research addresses two core questions: (RQ1) How is value created in journalistic cooperatives? and (RQ2) How can partnerships and collaborations help to strengthen journalistic cooperatives?

To answer these questions, the study adopts the 'business models in journalism' framework proposed by Marín-Sanchiz & Carvajal-Prieto (2019) and we discuss it and adapt it for journalistic cooperatives. Grounded in the multi-stakeholder business model ontologies of Morris et al. (2005) and Osterwalder & Pigneur (2010), the analytical framework evaluates seven interconnected business model components: mission statement, value proposition, target market, market positioning, key resources and capabilities, revenue model, and key partnerships.

The preliminary findings underscore that clearly articulating and strategically aligning all seven business model components is paramount for the long-term economic survival and mission fidelity of journalistic cooperatives. Furthermore, the study reveals that establishing multi-level partnerships and operationalizing the cooperative principle is necessary for overcoming the scale-economy disadvantages that typically favor large commercial media conglomerates (Etxezarreta et al., 2025). Through intercooperative solidarity, shared technological infrastructure, and participation in federated networks or distributed reporting initiatives, journalistic cooperatives pool scarce resources, enhance their information-gathering capacity, and safeguard editorial independence against market isomorphism.

In terms of discussion, this investigation advances the literature on journalistic business models (Marín-Sanchiz & Carvajal-Prieto, 2019) and journalistic cooperatives by showing that multi-stakeholder value creation can be reconciled with financial viability without sacrificing democratic control (Gollmitzer, 2026). The theoretical implications emphasize the necessity of expanding journalistic cooperative research empirically. Managerially, the study provides actionable guidelines for managers and worker-owners, and other cooperative members, on structuring diversified revenue streams, optimizing internal capabilities, and leveraging intercooperative partnerships. Finally, the study highlights several limitations and future research lines.

Keywords: Journalistic cooperatives; value creation; business models; intercooperation; collaborative networks

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Keywords: Media cooperatives; Sustainability in cooperatives; Technology and digitalization; Cooperative law; Intercooperation and networking

Theme(s): Intercooperation and Networking among Cooperatives; Technology, Digitalization, and Platform Cooperatives

The Contribution of (Community) Cooperatives to Place-based Development in Rural Areas of Europe

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Abstract

Background: Rural areas constitute over 75% of European territory and approximately a quarter of the European population (Eurostat 2024). Cooperatives have played an important role in rural Europe although historically the study of this relationship has been mainly confined to their importance in agriculture (Bolger 1977). Notwithstanding the significant role of agricultural cooperatives, cooperatives contribute to rural communities across a variety of sectors including, but not limited to, tourism, credit, retail, food, eldercare, work integration, renewable energy, housing, culture and heritage. They are also responding to new societal challenges such as climate change and ageing populations.

Aims: We explore the goods and services delivered by cooperatives across rural Europe and discuss their contribution to integrated and place-based rural development, aligning the work of cooperatives with the neo-endogenous approach to rural development. We also explore the link of cooperatives in rural Europe with principle 7 'concern for community' of the Statement of Cooperative Identity by ICA by analysing the 'community cooperatives' as a distinct organizational model often developed in rural areas.

Methods: We carry out a literature review of cooperatives in rural areas of Europe and two exemplary case studies of community cooperatives in rural Ireland and Italy.

Results and Discussion: Our results show that cooperatives in rural Europe in the energy sector are expanding, with these cooperatives contributing to socio-economic equality, by reducing local poverty, and to the promotion and development of renewable energy. These energy cooperatives are more often developed in accessible rather than in remote rural areas where there is great potential for development but external expertise and support is needed (Mueller et al. 2024). Credit cooperatives have historically played a significant role in rural areas by providing access to financing to local population and reinvesting in local communities, creating "virtuous" circles where the cooperative bank´s success is linked to the success of the community. This has been the base for the development and expansion of activities in rural areas, including agriculture, which have greatly impacted socio-economic regional development (Giagnocavo 2020). In the retail sector, cooperatives in rural areas have developed community shops and cafés, usually in remote/depopulated communities. These usually offer basic products but also services to the local community, such as postal services, and constitute a place for social gathering, thus contributing to social and economic development (O'Shaughnessy and O'Hara 2013). Another common sector of cooperatives in rural areas is the provision of training and employment opportunities for vulnerable people (people with disabilities, the long-term unemployed, ethnic minorities, newly arrived migrants). They focus on enhancing socio-economic integration (Kiss and Rázc 2024), and, in some instances such as social cooperatives practising social farming, have the potential to foster eco-social transformation by combining ecological agricultural practices and support for the local community (Elsen and Fazzi, 2021).

The characteristics and activities of cooperatives in rural areas are often linked to the wider community aspect of their rural areas. Community cooperatives as economic organizations rooted in specific places have mainly (although not exclusively) emerged and developed in marginalised rural areas (Mori and Sforzi 2018). They are characterized by inclusive governance, active citizen participation, and the adoption of place-based approaches in carrying out activities which can range from promoting new job opportunities through economic activities; fostering social cohesion and inclusion within the community; or managing activities of general interest, i.e. health and social services, mobility (Euricse 2024). Our review also

underlines some challenges related to community cooperatives such as: difficulties in community participation, especially in communities characterized by a fragmented social fabric; imbalances in power relations among actors within the 'inclusive' governance structure; and difficulties in finding economic activities that can create surpluses (benefits) to be redistributed.

Contributions and Implications: Our study shows how cooperatives in rural areas of Europe, from accessible to remote, provide services and products in a wide range of sectors, meeting community needs, enhancing participation and democratic decision making while (re)embedding economic objectives within social goals. These cooperatives foster an integrated place-based development pursuing a balance between social, economic and/or environmental objectives, and combining local resources and capacities with other external sources. This concurs with a neo-endogenous approach towards rural development. The type of rural development enhanced by these cooperatives offers an explicit link to principle 7 concern for the community, as they usually play a developmental role with a wider spatial focus beyond their members. However, our study also shows the critical importance of local repositories of resources and capacities for cooperative development, which are often absent in remote rural areas, and the need of integrating external resources and skills in multi-level governance frameworks that promote synergies between rural development actors.

Keywords: cooperatives; community cooperatives; rural areas; place-based development; neo-endogenous rural development

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Perceptions and attitudes of cooperative ecosystem actors toward the sixth cooperative principle of intercooperation

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Abstract

Background

In accordance with the sixth cooperative principle, namely cooperation among cooperatives (or intercooperation), cooperative enterprises develop various forms of synergies, networks, and partnerships with other cooperatives to better serve their members' interests and achieve outcomes comparable to those of larger enterprises, “while maintaining the advantages of local involvement and ownership” (ICA, 1996). However, the absence of a precise definition of intercooperation presents a significant conceptual challenge. Since the principle primarily articulates the purpose of cooperation rather than its defining characteristics or organizational forms, it remains difficult to determine which types of interorganizational activities constitute intercooperation or how to evaluate intercooperation performance of cooperatives (Fici, 2015).

Within the broader field of organizational studies, interorganizational cooperation has long been recognized as a valuable strategic approach. Early scholarship referred to this phenomenon through concepts such as organizational interdependence (Aiken & Hage, 1968), exchange relationships, cooperation, and concerted decision-making processes (Warren, 1972). Interorganizational cooperation enables organizations to generate relational rents (Dyer & Singh, 1998) and gain access to complementary assets and resources at lower costs (Hagedoorn, 2002), as well as to resources that may otherwise remain geographically or institutionally distant (Colombo et al., 2011). Furthermore, collaborative arrangements allow participating organizations to share risks associated with joint investments, thereby reducing the burden of potential failures on individual partners. Cooperation also facilitates knowledge transfer and interactive learning processes, fostering innovation through the co-creation of ideas, products, and projects (Veugelers, 1997; Tsai, 2009).

Although research on meta-organizations and interorganizational relationships has expanded considerably in recent years (Brès et al., 2018), scholarly attention to these dynamics within the cooperative sector remains relatively limited. Nevertheless, studies conducted over the past fifteen years indicate that intercooperation generates benefits similar to those documented in the broader interorganizational literature, including enhanced organizational performance, resource sharing, and capacity building among participating cooperatives (Alves et al., 2016; Diniz et al., 2023; Meliá-Martí et al., 2023; de Sousa et al., 2024). Beyond its economic and organizational advantages, intercooperation has also served broader political and institutional objectives, including the promotion of the cooperative business model and the strengthening of the cooperative movement’s legitimacy (Oczkowski et al., 2013; Meyer et al., 2017; Hannachi et al., 2020). These functions further underscore why intercooperation is regarded as a foundational principle of the cooperative identity.

Although these studies provide valuable insights into the ways intercooperation is enacted across diverse contexts, as well as the incentives motivating such activities and the outcomes they generate, little attention has been given to how cooperatives themselves conceptualize and define intercooperation or how they assess the effectiveness of their intercooperative engagements. This study addresses this gap by examining and comparing the perspectives of various stakeholders operating within cooperative business ecosystems. In doing so, it explores the motives underpinning intercooperation, the factors that facilitate collaborative initiatives, and the barriers that may hinder cooperatives from engaging in such activities.

Methods

Adopting a qualitative research design, the study investigates how the principle of intercooperation is understood and translated into the everyday practices of cooperative organizations, through semi-structured interviews. It further examines the rationale behind decisions to pursue intercooperative arrangements. An interview guide covering a broad range of themes, including participants' understandings of intercooperation, its principal triggering factors, the expected financial and non-financial benefits, internal and external enablers, prevailing intercooperation practices, and emerging collaboration dynamics and associated risks was used. The sample comprised experts from the Belgian cooperative ecosystem with at least ten years of professional experience across multiple sectors. Participants included cooperators, board members, managers and administrative staff of both primary cooperatives and higher-tier cooperative organizations, as well as scholars specializing in cooperative studies. Following the grounded theory methodology proposed by Gioia et al. (2013), first-order concepts were identified directly from participants' accounts and subsequently grouped into second-order themes to explain attitudes, perceptions, and behaviors related to intercooperation.

Results

The findings reveal the diversity of perspectives surrounding the principle of intercooperation and the varied ways in which cooperatives incorporate it into their strategic and operational practices. Beyond the conventional distinction between horizontal and vertical forms of intercooperation, the analysis highlights differences in collaborative motivations linked to cooperative size and the characteristics of the markets in which organizations operate. Political objectives, particularly those related to advocacy and the legitimization of the cooperative movement, appear to outweigh motivations associated with business expansion and scaling. Furthermore, the dynamics developed through previous intercooperative relationships significantly shape attitudes toward future collaborative initiatives, influencing both the willingness to cooperate and the forms such cooperation may take.

According to the participants, intercooperation is closely associated with member education, training, and engagement, as well as with the entrepreneurial orientation of cooperative organizations. All participants emphasized that cooperation among Belgian cooperatives remains insufficient in relation to day-to-day business operations. They suggested that greater efforts are needed to establish intercooperation as a mainstream strategy for cooperative growth and scaling, particularly through the development of cooperative networks, platforms, and collaborative structures. For smaller cooperatives, intercooperation was identified as an important mechanism for accessing funding opportunities. Participants also noted that intercooperation attempts often provide fertile conditions for new cooperatives to emerge.

Building on these observations, the present study further explores the dynamics of intercooperation. The analysis highlights the mechanisms that safeguard smaller cooperatives from risks of domination by larger partners, including democratic governance practices and organizational arrangements rooted in cooperative values. It also examines the connections between intercooperation and the fifth cooperative principle, concerning education, training, and information, as well as the seventh principle, concern for community. Furthermore, the study approaches the evaluation of intercooperation through a distinction between its quality and quantity, while considering the influence of cooperative-specific characteristics, such as organizational size, culture, and contextual idiosyncrasies. These factors are found to shape both the nature and intensity of intercooperative behavior.

Keywords: cooperation among cooperatives; intercooperation; intercooperation impact

Theme(s): Intercooperation and Networking among Cooperatives

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Connecting socially responsible regulation with cooperative principles: The case of the Valencian region

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Abstract

Background

The values and principles of the cooperative movement serve as key guidelines to ensure that cooperatives function as human-centered, sustainable, and equitable enterprises. However, within the regulatory framework, the cooperative corporate form is defined not by cooperative principles but by mutuality and the members' right to participate in the management of corporate affairs. In addition, socially responsible regulation affects not only cooperatives but also other types of companies.

Aims

We argue that there is a strong connection between socially responsible regulation and the cooperative principles that give cooperatives a competitive advantage in qualifying them as socially responsible companies. To address this point, this research analyzes the alignment between the Valencian socially responsible regulatory framework and the seven universal cooperative principles to determine if the cooperative model possesses a structural advantage in achieving formal socially responsible certification.

Methods

To support our argument, we first provide a detailed and systematic analysis of a recent socially responsible regulatory framework in the Valencian Region, addressing its legal, technical, and economic dimensions. More specifically, the study focuses on Decree 200/2022, of 25 November, issued by the Consell, which regulates social responsibility in Valencian entities. This regulatory instrument is examined not only in terms of its normative content but also in its practical implications for organizations operating in the region. The study employs a multicriteria analysis of the Decree's legal, technical, and economic dimensions, comparing its scoring system with the foundational values of the social economy and the proposed national law for its promotion

Furthermore, the study incorporates a comparative legal analysis of Decree 200/2022 alongside selected considerations derived from the draft law on the promotion of the social economy. This complementary perspective aims to situate the Decree within a broader and evolving regulatory context, enabling the identification of common elements, divergences, and potential areas of alignment between existing and forthcoming legal frameworks. Such a comparison contributes to a deeper understanding of the direction of public policy in social responsibility.

Finally, the paper explores the extent to which the most significant elements of regional regulation on socially responsible criteria are aligned with the seven cooperative principles. This final step seeks to determine whether, and to what extent, the regulatory approach reflects the foundational values and principles traditionally associated with cooperative organizations, thereby reinforcing their role within the broader social economy ecosystem.

Results

The analysis reveals that regional regulation provides a formal quantitative framework for cooperative principles, particularly through its evaluation of inclusive governance and social-labor indicators, which account for the largest share of the possible score (up to 60 of 150 total points). For companies with 50 to

250 employees, the decree proposes evaluating companies across four key dimensions, resulting in total scores ranging from 50 to 150 points. Ethical performance is assessed through indicators that allow scores between 12 and 37 points, while social and labor aspects, supported by an extensive set of 48 indicators, contribute between 21 and 60 points. Environmental performance is measured using 11 indicators, yielding scores ranging from 12 to 38 points. Finally, socially responsible research is evaluated using seven indicators, each with a possible score of 5-15 points. The model follows Bentham's additive utilitarian principle, meaning that each dimension contributes independently to the final score. Importantly, both the weights assigned to each dimension and the maximum achievable scores vary according to company size, ensuring proportional and contextsensitive evaluation. This structure allows for a comprehensive and flexible assessment of corporate responsibility across diverse organizational profiles. The connection between aspects of the seven cooperative principles and the analyzed regulation yields the following results. First, the Decree upholds the principle of voluntary and open membership by requiring formal non-discrimination commitments and valuing inclusive practices. Second, democratic member control is reflected in governance structures such as the board of directors and mechanisms that promote upward communication and participation. Third, member economic participation is demonstrated through indicators that measure how cooperatives generate and distribute economic value among members and the community. Fourth, autonomy and independence are supported through mandatory sustainability reports and third-party social audits, ensuring credible, non-interfered governance. Fifth, the Decree strongly emphasizes education and training by scoring the creation of training structures and the provision of equitable professional development opportunities. Sixth, cooperation among cooperatives is encouraged, with incentives for collaboration with social-economy entities and third-sector organizations. And seventh, concern for community is expressed through requirements for local engagement, support for cultural and social projects, use of local suppliers, and environmental commitments.

Discussion

As a result of this connection, we discuss how cooperative business models are well-positioned to be considered socially responsible under the regulation, given the alignment of regulatory criteria with cooperative principles. Our analysis also provides insights into the key elements of socially responsible regulation that may help cooperatives to work in the right direction to obtain the desired qualification. While the regional regulatory framework incentivizes collaboration among social-economy entities and supports democratic member control, the results demonstrate that alignment does not automatically translate into compliance.

The exploration of whether social responsibility can be objectively measured reveals significant implications for organizational governance. Decree 200/2022, of 25 November, of the Council, regulating social responsibility in Valencian entities, establishes that such measurement is possible and introduces a formal framework for evaluating entities beyond traditional financial or legal metrics. The research contributes to public policy literature by demonstrating how a multicriteria management approach, integrating economic viability with social impact, is essential for distinguishing genuine commitment from nominal adherence in both cooperative and commercial firms.

Contributions and Implications

This study challenges the normative assumption that cooperatives are inherently socially responsible by virtue of their democratic identity. It introduces an analytical lens where social responsibility is treated as an objective, measurable dimension of organizational behavior rather than a symbolic label. Cooperatives do not automatically embody social responsibility; their practices must still be assessed and validated. Likewise, the idea that cooperatives are necessarily more socially responsible than commercial companies does not hold universally. While cooperatives often align with principles that promote social and environmental wellbeing, this alignment does not guarantee superior performance in practice. The classification of socially responsible entities entails adopting a multicriteria management approach that integrates economic viability with legal compliance, social impact, and environmental stewardship. This

broader evaluative lens encourages organizations of all types to internalize responsibility as a strategic and operational priority rather than a symbolic label. Ultimately, these questions highlight the need for rigorous, evidencebased assessment tools that can distinguish genuine commitment from nominal adherence, ensuring that social responsibility becomes a measurable and accountable dimension of organizational behavior.

Keywords: Sustainability; regulation; cooperative principles; multidimensional indicators

Theme(s): Environmental and Social Sustainability in Cooperatives

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Eco Innovation in Cooperatives vs. Conventional Firms: A Sectoral Comparison across Spanish Agrifood, Manufacturing and Services

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Abstract

Background

Eco-innovation is central to firms' competitiveness and the transition toward sustainable production and consumption (Banelienė et al., 2023; Pichlak & Szromek, 2021). Cooperatives are often expected to be environmentally responsive because their values may broaden stakeholder representation and strengthen attention to environmental externalities (International Co-operative Alliance, 2015; Puusa et al., 2016; Albanese, 2024). Stakeholder theory similarly suggests that stakeholders represented in cooperative governance may promote environmental improvements whose benefits accrue within firms and local communities (Freeman, 1984; Pérotin, 2016). Existing evidence remains inconclusive and is generally restricted to particular regions or sectors (Carchano et al., 2023; Basterretxea et al., 2024; Ferrer et al., 2024).

Aims

We ask: (H1) Does the effect of cooperative status on eco-innovation differ across sectors? (H2) Does cooperative status positively affect eco-innovation within the firm? (H3) Is cooperative status unrelated to eco-innovation benefiting end users?

Methods

2023 Spanish Innovation Survey microdata: 29,720 firms, 693 cooperatives, agri-food, manufacturing, and service activities (INE, 2023). Dependent variables follow CIS outcome-based definitions: (i) ecoinnofirm (significant environmental benefits realized within the firm) and (ii) ecoinnouser (significant environmental benefits realized by end users). Models include cooperative/sector dummies and controls. We estimate Probits and complement them with descriptives and cluster analysis.

Results

Cooperatives are generally older and larger, less likely to belong to corporate groups, and more likely to receive public innovation support, conduct R&D, and cooperate for innovation. In the full-sample Probit model, cooperative status increases the probability of within-firm eco-innovation. Cooperative status is unrelated to end-user eco-innovation. Compared with agri-food firms, manufacturing and service firms are less likely to introduce within-firm eco-innovations, while service firms are also less likely to report end-user benefits.

Sectoral analyses reveal substantial heterogeneity. In agri-food and manufacturing cooperative eco-innovation advantage disappears. Services are the only sector in which the cooperative effect persists after controls, although the effect remains weak and smaller than those associated with cooperation, product innovation, and external R&D.

Cluster analysis highlights further heterogeneity. Cooperatives are proportionally twice as prevalent among high eco-innovators. High eco-innovator cooperatives cooperate more, receive more public support, undertake more R&D, and achieve stronger innovation outcomes than the average, suggesting that eco-innovation is associated with a combination of capabilities rather than cooperative status alone.

Discussion

The findings challenge a strong "innate greenness" thesis while rejecting the assumption that cooperatives are intrinsically disadvantaged in eco-innovation. The stronger within-firm eco-innovation and absence of an effect on end-user eco-innovation is consistent with cooperative governance giving greater salience to organizational and local stakeholders than to geographically dispersed users. However, the modest and weakly significant association does not indicate a universal finding.

Sectoral heterogeneity is decisive. Observable capabilities explain the apparent cooperative advantage in agri-food, while industrial cooperatives' general innovation capabilities do not necessarily translate into environmental outcomes. In services, the residual cooperative association provides suggestive rather than conclusive evidence that stakeholder-oriented governance favours within-firm environmental improvements. Overall, cooperation, public support, external R&D, and conventional innovation outputs predict eco-innovation more consistently than organizational form.

Contributions and Implications

We provide nationwide comparative evidence and show that: (i) the cooperative effect differs across sectors, supporting H1; (ii) cooperative status is positively but modestly associated with within-firm eco-innovation, providing qualified support for H2; (iii) it does not predict end-user eco-innovation, supporting H3; and (iv) cooperatives are overrepresented among high eco-innovators, although this pattern is driven by a small group combining cooperative status with strong innovation capabilities. Policy should prioritize the conditions enabling eco-innovation rather than ownership form alone. This requires knowledge-transfer networks and green finance in agri-food, measures redirecting manufacturing innovation capabilities toward environmental outcomes, and collaborative eco-innovation and inter-cooperation in services. Longitudinal research is needed to address endogeneity and identify the mechanisms underlying the residual cooperative effect in services.

Keywords: Cooperatives; Eco-innovation; Sectoral heterogeneity; Spain; Community Innovation Survey (CIS)

Theme(s): Environmental and Social Sustainability in Cooperatives

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Rediscovering the Lost Footsteps of the Cooperative Movement

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Abstract

Background

This research traces the historical development of the New Deal Coalition, a powerful alliance that, alongside labor unions—most notably the Women's Trade Union League (WTUL)—helped electrify the nation and revive the American economy by establishing worker cooperatives during the Great Depression. Women emerged as key figures, passionately recruiting, training, and nurturing these cooperatives. Even when cooperatives fell short, labor unions strengthened as a vital alternative.

As World War II unfolded, the New Deal Coalition adapted its approach to support the war economy, actively recruiting Mexican agricultural workers to sustain and expand national production.

In just a decade, this coalition laid the groundwork for labor rights protections, Social Security, and a public funding structure that supports the social and solidarity economy we recognize today. Their innovative use of broadcasting helped spread vital information; radios were installed in grocery stores, enabling community members to listen to Eleanor Roosevelt discuss the importance of forming and organizing cooperative projects.

By 1946, the U.S. Department of Labor's Monthly Review reported that the national cooperative movement boasted at least 19 million organized members, with over 80 percent being women, operating in more than 20,000 cooperatives across diverse business sectors and representing 34 percent of the American workforce. Remarkably, food cooperatives provided basic goods independently to 25 percent of the population and contributed 10 percent to the Gross Domestic Product (GDP). Furthermore, the sponsorship dividends reported throughout the national cooperative movement reached nearly $500 million that same year.

Yet, the following year brought the challenging tide of McCarthyism within government. By 1950, retail merchants mounted a nationwide campaign against cooperatives, branding them as "un-American, subversive, and communist."

By 1955, in the wake of this campaign, the national cooperative movement's membership had declined sharply to about 5,000. Sadly, McCarthyism systematically erased much of the documentation detailing the profound efforts made to establish vibrant community and labor organizations.

Aims

At the Cooperative Development Institute, we are dedicated to empowering the Northeast region—New York, Connecticut, Rhode Island, Massachusetts, Vermont, New Hampshire, and Maine—by strengthening the social and solidarity economy. Our mission focuses on uplifting cooperative projects led by immigrants, who are a vital part of our communities. As we look toward 2026, we are determined to navigate the challenges posed by an anti-immigrant administration that has sought to undermine initiatives that benefit immigrants. While facing adversity reminiscent of McCarthyism, we remain steadfast in our commitment to support those who contribute so significantly to our economy.

The Congressional Budget Office (CBO) forecasts an impressive $8.9 trillion increase in GDP from 2024 to 2034, with immigrants contributing 17% of GDP in 2024 alone and the Latino community adding a remarkable $4.4 trillion.

Despite the erosion of fundamental human rights—including due process, habeas corpus, and the rights to work, health, education, and food—we stand shoulder to shoulder with immigrant communities confronting a humanitarian crisis. Together, we can overcome the obstacles that make daily life a struggle.

In communities like Central Falls, Rhode Island, where immigrants proudly own 80% of businesses and make up over 85% of the population, their resilience shines through, even amid economic challenges. We believe in the strength and vitality of these communities, and we will continue to champion their cause.

Methods

By empowering community leadership, we have united the Mayor's Office, state government, the legislature, and the local Chamber of Commerce to champion collaborative projects. Inspired by the New Deal Coalition, our strategy centers on creating cooperatives from the ecosystem through a top-down approach. By mobilizing fundraising efforts, we are igniting hyperlocal economic development to revitalize severely impoverished municipalities.

Our mission is to forge shared solutions that cultivate the conditions for survival. We are pioneering new systems of production, sales, and consumption, along with innovative distribution methods that allow cooperatives to share costs, services, and benefits. This collaboration not only lowers production costs but also reduces retail prices for essential products. Furthermore, this initiative breathes new life into at-risk communities, empowering them to build a vibrant, community-driven, solidarity-based, and healthy economy.

Results

From the 265 business owners in the Central Falls community initially affected, 75 are now engaged in inspiring new cooperative projects, dramatically decreasing their risk of financial collapse. This transformative journey has also given rise to consumer societies and consumer cooperatives, strengthening community ties and paving the way for stability.

Discussion

Despite the challenges, lingering skepticism and distrust remain around our approach to creating cooperatives from the ecosystem. Some may doubt its feasibility, while others call for the project to be closed.

Contributions and Implications

We believe that by fostering micro-solutions for the hyper-local economy—highlighting stakeholders, defining the problems, and exploring potential contributions—we have made meaningful progress. This initiative holds the power to rejuvenate local economic processes, enabling communities to forge their own solutions, one at a time. We must take a gradual path, inspiring collaboration among stakeholders—from local and state governments to economic actors—on projects like the pilot initiative in Central Falls. Together, we can empower communities in crisis to reclaim their initiative and strength.

Keywords: McCarthyism; Cooperatives; Hyper-local Economic Development

Theme(s): Intercooperation and Networking among Cooperatives; Emerging Sectors and New Themes

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Aging, participation, technology: some insights from social innovations for older adults in Croatia

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Abstract

Background

Contemporary societies are experiencing profound demographic shifts, with population aging emerging as one of the most significant global trends. Older adults face increased risks of social exclusion, poverty, and limited access to essential services, particularly in the context of digital exclusion. According to the United Nations (2020), individuals over the age of 65 represent the fastest-growing demographic group, and their proportion in total populations is projected to increase steadily over the coming decades. While digital technologies offer substantial opportunities to enhance quality of life, their effective implementation requires inclusive and participatory approaches. Digital technologies—including smartphones, tablets, computers, applications, wearable devices, and other digital infrastructures—have become increasingly integrated into the daily lives of older adults, particularly in healthcare and assistive technology contexts (Wanka & Gallistl, 2018; Rosales & Fernández-Ardèvol, 2016). Social innovations are widely recognized as key mechanisms for addressing these challenges, as they aim to develop novel solutions through participatory, collaborative, and inclusive methods (Mulgan, 2006, 2012; Murray, Caulier-Grice, & Mulgan, 2010). Beyond functional problem-solving, they can also be transformative, reshaping how communities organize, interact, and deliver services (Nicholls & Murdock, 2012; Guzman et al., 2024). In particular, cooperatives, civil society organizations and other collective organizational models provide a promising framework, as they emphasize democratic governance, member participation, and community-oriented solutions. However, in the Croatian context, there is limited systematic research examining how social innovations—especially those with cooperative characteristics—integrate digital technologies and participatory practices to address the needs of older adults.

Aims

This study aims to identify and analyze social innovations targeting older adults in Croatia, with a particular focus on the role of cooperative and collective organizational models. Specifically, the research seeks to:

(1) identify key characteristics of these initiatives,

(2) examine the main actors and organizational forms, with emphasis on cooperatives,

(3) analyze the extent and modes of digital technology integration,

(4) assess the level of participation and community involvement,

(5) explore the presence of peer-to-peer support networks among older adults, and

(6) evaluate social impacts in terms of inclusion, digital literacy, and community cohesion.

Methods

The study adopts an exploratory, multi-method research design combining desk research, systematic literature review, mapping of initiatives, and the development of a typology of social innovations. The empirical component consists of ten semi-structured interviews with founders, project coordinators, and key stakeholders involved in initiatives targeting older adults. Thematic analysis is applied to identify key patterns in social innovations for older adults, regarding participation, technology integration and social impact.

Results and Discussion

Preliminary findings indicate significant diversity among social innovations targeting older adults in Croatia, combining social, technological, and community-oriented elements. Most initiatives are led by civil society organizations, social enterprises, and high-tech startups, while some exhibit characteristics aligned with cooperative principles, such as collective ownership, participatory decision-making, and community embeddedness. The level of digital integration varies widely, ranging from basic communication tools to advanced applications and assistive technologies. Participatory approaches are present but uneven: while some initiatives actively involve users through co-design workshops, volunteering, and community-based activities, others rely on more top-down approaches. The findings suggest that cooperative-like models may offer stronger potential for fostering inclusion, trust, and long-term sustainability.

Contributions and Implications

This study contributes to the literature on aging, social innovation, participatory models, and cooperative studies by providing empirical evidence and a context-specific typology of initiatives targeting older adults in Croatia. It advances understanding of how participatory approaches and digital technologies intersect practices targeting older adults. The findings offer practical implications for policymakers, cooperatives, social enterprises, and civil society organizations by identifying strategies to enhance inclusiveness, digital engagement, and sustainability.

Keywords: social innovations, older adults, aging, digital technologies, participation

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The Relationship Between Well-being and Job Performance in Cooperatives: A Cluster Analysis of the Green Happy-Productive Worker

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Abstract

Background

In contemporary organizational research, employee well-being and performance are no longer treated as independent constructs. Rather, sustainable workforce management requires a nuanced understanding of how these dimensions co-exist and interact within specific organizational contexts. The academic tradition of the "happy–productive worker" thesis (Staw, 1986) has long posited a positive, linear relationship between job satisfaction and performance: employees who are satisfied tend to perform better, while dissatisfied workers display reduced performance levels (Wright & Cropanzano, 2007). Despite nearly a century of empirical attention, however, the review conducted by Sender and colleagues (2020) demonstrates that this relationship remains incompletely understood, with inconsistent findings across industries, methodologies, and theoretical frameworks. More broadly, the traditional model has been questioned on several grounds, among them its narrow operationalization of well-being and performance, and its assumption of a uniform heterogeneity among emplopyees.

Addressing these shortcomings, Peiró and colleagues (2014) proposed the Sustainable Well-being-productivity Synergy (SWPS), which offers a reformulation of the happy–productive worker. This synergy expands the operationalization of both constructs, going beyond satisfaction to encompass hedonic and eudaimonic components of well-being, and broadening performance to include in-role and extra-role behaviors, while advocating for person-centered analytical approaches that can capture configurational patterns rather than assuming uniformity across employees. In recent years, a growing number of empirical studies have applied the ideas of the SWPS framework in diverse organizational settings, incorporating varied antecedents and outcomes. Nonetheless, the sustainability dimension of this model has remained largely underexplored. A recent contribution by Pătraş and colleagues (2025) begins to address this gap by introducing the label of the "green happy–productive worker", which explicitly incorporates environmental dimensions into the well-being–performance nexus. Specifically, this emerging construct connects green human resource practices to employees' environmental job satisfaction and their engagement in environmental organizational citizenship behaviors (OCB-E), which are voluntary, discretionary behaviors that benefit the organization's sustainability goals. Cooperatives represent an especially suitable organizational context for examining these dynamics. Founded on principles of democratic governance, solidarity, and mutualism, cooperatives are structurally and culturally predisposed toward environmental and social responsibility. Within this type of organization, environmental job satisfaction is not merely an outcome but a foundational premise tied to organizational identity. Similarly, OCB-E can be understood as an expression of the cooperative's core values in practice. For these reasons, cooperative organizations offer a unique and ecologically valid environment in which to investigate the green happy–productive worker thesis.

Aims

This study hypothesizes that the relationship between OCB-E and environmental job satisfaction among cooperative members is nonlinear and configurational rather than uniform across individuals. Rather than assuming that all satisfied employees will be productive (or vice versa), we propose that distinct profiles

emerge that reflect different combinations of environmental well-being and performance. The aim of this study, therefore, is to analyze how a sample of cooperative members is distributed across profiles characterized by varying levels of OCB-E and environmental job satisfaction, and to assess what this distribution reveals about the green happy–productive worker thesis in the cooperative context.

Methods

Data were collected from a sample of 399 workers belonging to cooperative organizations. Participants completed validated self-report instruments measuring two focal constructs: OCB-E (Cronbach's alpha = 0.91) and environmental job satisfaction (Cronbach's alpha = 0.91), both demonstrating strong internal consistency. The person-centered analytical strategy employed was k-means cluster analysis, carried out using the ROP-R (Random Optimal Partition with Resampling) procedure, which is specifically recommended for identifying heterogeneous subgroups within organizational samples. This approach is well-suited to detecting nonlinear, configurational patterns in the data that would be obscured by traditional variable-centered methods such as regression analysis.

Results

The k-means cluster analysis yielded a four-cluster solution with robust fit indices (EESS% = 74.14; HCmean = 0.52; XBmod = 0.71), confirming the statistical adequacy and interpretive clarity of the solution. The four clusters can be described as follows. The first cluster, Happy-Productive (N = 158), comprises employees who report high levels of both environmental job satisfaction and OCB-E. This is the largest group and most closely corresponds to the idealized green happy–productive worker profile. The second cluster, Happy-Unproductive (N = 123), includes employees who report high environmental satisfaction but engage in relatively lower levels of OCB-E. Despite their positive affective orientation toward environmental aspects of their job, these workers do not translate their satisfaction into observable sustainability-oriented behaviors. The third cluster, Unhappy-Productive (N = 47), presents the opposite pattern: these employees exhibit high OCB-E despite reporting lower environmental job satisfaction. This may suggest that performance in this group is driven by normative, role-based, or structural motivations rather than genuine affective fulfillment. The fourth and final cluster, Unhappy-Unproductive (N = 71), captures employees with both low environmental satisfaction and low OCB-E, representing the most disengaged profile within the sample.

Discussion

The identification of four distinct profiles demonstrates that the relationship between environmental well-being and sustainability-oriented performance is not linear but configurational. Not all satisfied employees are productive, and not all productive employees are satisfied; a finding that challenges the assumptions of the traditional happy–productive worker thesis even within a context as value-laden as cooperatives. The presence of the Happy-Unproductive cluster is particularly noteworthy: despite the cooperative identity and its implicit emphasis on collective and environmental values, a substantial portion of members experience environmental satisfaction without this being expressed in extra-role behavior. Conversely, the Unhappy-Productive cluster suggests that cooperative norms and structural expectations may sustain behavioral performance even in the absence of affective fulfillment, pointing to the importance of institutional factors that go beyond individual well-being. The existence of the Unhappy-Unproductive cluster further indicates that cooperative membership does not automatically guarantee alignment between green well-being and green performance, underscoring the need for targeted organizational interventions.

Contributions and Implications

This study makes several contributions to theory and practice. Theoretically, it extends the SWPS framework and the emerging green happy–productive worker literature by demonstrating that environmental well-being and sustainability-related performance can co-exist in multiple configurations, rather than following a single directional pattern. Methodologically, it showcases the value of person-

centered approaches in revealing heterogeneity that would be masked by aggregate analyses. Practically, these findings suggest that cooperative identity alone is insufficient to ensure a sustainable green alignment among members. Organizations in the social economy cannot assume that shared values automatically translate into pro-environmental behaviors or environmental job satisfaction. Instead, more tailored human resource practices are needed, ones that identify which profile employees belong to and offer differentiated support accordingly. For example, Happy-Unproductive employees may benefit from stronger behavioral incentives or collective action frameworks, while Unhappy-Productive employees may require attention to the affective and relational quality of their work experience.

Keywords: Sustainable HRM; Employee well-being; Job performance; Cluster analysis; Cooperatives

Theme(s): Environmental and Social Sustainability in Cooperatives; Measuring Impact and Performance of Cooperatives

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4. Cooperative Law and Public Policy

Research streams: Cooperative Law · Public Policy and Institutional Support for Cooperatives

9 contributions

Decentralization and Sustainability in the Social Economy: Blockchain and EU Textile Cooperatives

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Abstract

Background

The European textile and clothing sector is undergoing a regulatory and technological transition driven by the European Green Deal, the Circular Economy Action Plan and Regulation (EU) 2024/1781 establishing the Ecodesign for Sustainable Products Regulation (ESPR). The progressive implementation of the Digital Product Passport (DPP) requires reliable product-level information on provenance, material composition, environmental performance and circular handling throughout increasingly complex supply chains. These obligations create particular difficulties for small and medium-sized enterprises and social-economy organizations, which often face limited capital, fragmented data systems and reduced access to technical expertise. Worker and producer cooperatives are nevertheless institutionally well positioned for this transition because democratic member control, equitable economic participation, cooperation among cooperatives and concern for community already align with social and environmental sustainability objectives. Distributed ledger technology (DLT), especially permissioned blockchain architectures and smart contracts, offers a potential infrastructure for verifiable coordination, traceability and shared governance, but its use also raises important questions concerning legal validity, data protection, cost and technological dependence.

Aims

This study examines the legal, technical and institutional convergence between blockchain systems and cooperative organizational models in the European textile sector. It pursues four objectives: to assess the structural alignment between distributed-ledger properties and cooperative principles; to evaluate how smart contracts could support statutory governance processes under Spanish Law 27/1999 on Cooperatives; to analyze permissioned blockchain architectures as an infrastructure for DPP implementation under the ESPR; and to identify legal and operational tensions, particularly the conflict between blockchain immutability and the right to erasure under Article 17 of the General Data Protection Regulation (GDPR).

Methods

The research adopts an interdisciplinary qualitative design combining doctrinal legal analysis, socio-technical systems assessment and comparative institutional analysis. Primary legal materials include Spanish Law 27/1999, Regulation (EU) 2024/1781 and Regulation (EU) 2016/679, supplemented by relevant European sustainability instruments and cooperative-law scholarship. The technical assessment compares permissionless networks with permissioned consortium architectures and examines consensus mechanisms, smart-contract determinism, off-chain storage, cryptographic anchoring, zero-knowledge proofs and redactable-ledger techniques. The institutional component contrasts platform cooperatives and decentralized autonomous organizations and reviews textile traceability initiatives, including UNECE Recommendation No. 46. The synthesis evaluates not only whether blockchain can technically perform a function, but whether the resulting architecture remains compatible with cooperative governance, legal accountability and practical accessibility.

Results

The analysis identifies a strong structural homology between cooperative governance and appropriately designed decentralized networks. Democratic member control can be supported through credential-based voting systems that preserve the principle of one member, one vote, while smart contracts can automate procedural checks relating to assembly convocation, quorum, proxy limits and the allocation of statutory surpluses. At supply-chain level, a permissioned consortium ledger can support DPP traceability by linking verified records from fiber production, processing and garment assembly to product identifiers while retaining substantive datasets off-chain. This model can strengthen provenance verification and reduce opportunities for unsupported sustainability claims. However, the study also identifies significant limitations. Public permissionless networks create uncertainty over data controllership, expose participants to unpredictable transaction costs and may conflict with cooperative requirements for identifiable responsibility. More fundamentally, permanent on-chain personal data are difficult to reconcile with GDPR erasure rights. A privacy-by-design model therefore requires identifiable information to remain in encrypted off-chain repositories, with only hashes or state proofs anchored to the ledger. Deletion of off-chain records, destruction of encryption keys, zero-knowledge proofs and, in tightly governed consortium settings, chameleon-hash redaction mechanisms can reduce this conflict. Economic and organizational barriers remain substantial: implementation costs, the physical-digital “oracle problem,” fragmented technical capacity and digital-literacy gaps may reproduce new forms of dependence if governance is effectively transferred from members to software specialists.

Discussion

Blockchain is therefore not intrinsically cooperative or sustainable. Its institutional effect depends on architecture and governance. The most suitable model for textile cooperatives is not a speculative public-chain ecosystem, but a permissioned, federated infrastructure collectively governed by cooperatives and supported by transparent technical standards. Second-degree cooperative structures can mutualize development and compliance costs, define joint controllership responsibilities and distribute validating functions among trusted institutions. Open-source, CIRPASS-aligned middleware can further reduce proprietary lock-in and improve interoperability. Regulatory sandboxes are particularly relevant because they allow cooperatives to test digital voting, DPP systems and privacy-preserving mechanisms under regulatory supervision before deployment at scale. These safeguards are necessary to prevent a nominally decentralized system from producing technocratic concentration in practice.

Contributions and Implications

The study proposes the concept of “Solidarity by Design” as an extension of legal and technological design approaches such as privacy by design and Lex Informatica. The concept argues that cooperative principles should not merely surround digital infrastructure as external ethical commitments; they should be translated into the system’s executable rules, access rights and governance procedures. This has implications for legislators, regulators and cooperative federations. Cooperative law should provide clearer recognition of cryptographically authenticated assemblies, digital corporate records and legally enforceable smart-contract execution where statutory safeguards are preserved. Data-protection authorities should provide more specific guidance on functional erasure and decentralized controllership. European DPP implementation should prioritize open standards and shared infrastructures accessible to SMEs and social-economy actors. Properly governed, blockchain can become a supporting infrastructure for democratic control and circular traceability rather than an end in itself, enabling textile cooperatives to participate in the green and digital transitions without abandoning their institutional identity.

Keywords: blockchain; cooperatives; Digital Product Passport; textile sustainability; social economy

Theme(s): Cooperative Law; Technology, Digitalization, and Platform Cooperatives

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Factors Driving Cooperative Creation in Spain: Evidence from Provincial Data

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Abstract

The social economy represents a fundamental domain within national economic activity, contributing significantly to job creation, social cohesion, and territorial resilience. Within this sector, cooperatives constitute a major organizational form that prioritizes human capital over economic capital. Article 129.2 of the Spanish Constitution and various European directives explicitly mandate public authorities to foster cooperative development. Although an extensive body of literature analyses the drivers of new firm formation across supply, demand, and institutional categories, empirical research on Spanish cooperative creation has almost exclusively utilized regional-level panel data at the NUTS-2 level across 17 autonomous communities. This regional aggregation masks substantial intra-regional heterogeneity and limits statistical precision.

The primary objective of this study is to examine the economic, social, and institutional determinants driving cooperative and worker cooperative creation across Spanish provinces (NUTS-3) over the period 2009-2023. A key objective is to perform a comparative econometric analysis against the creation factors of conventional commercial enterprises-specifically limited liability companies (LLCs) and self-employed. By utilizing a disaggregated provincial panel, the study seeks to test whether the traditional "refuge effect" (unemployment acting as a push factor for cooperative entry) holds at the subregional level once controlling for province-specific fixed effects, and to evaluate the relative stability of cooperatives during economic shocks.

The empirical investigation relies on a panel dataset comprising 709 observations across all 50 Spanish provinces spanning 2009 to 2023. Dependent variables measure provincial entry rates for cooperatives, worker cooperatives, LLCs, and self-employed, standardized per 10,000 active inhabitants. Data were assembled from official statistics published by the Ministry of Labour and Social Economy (MITES), the Ministry of Inclusion, Social Security and Migration (MISSM), and the National Statistics Institute (INE). Explanatory factors cover demand-side variables (population growth rate, real GDP per capita growth rate, and gross value added [GVA] shares of manufacturing and service sectors), supply-side variables (unemployment rate, higher education rate, and secondary education rate), and institutional/cultural determinants (population density, regional government political orientation, cooperative density, and business density). Econometric estimations are conducted using Ordinary Least Squares (OLS) and two-way Fixed Effects (FE) panel models with province and year fixed effects, using robust standard errors clustered at the provincial level. Mean-centring was applied to quadratic density terms to eliminate multicollinearity, as confirmed by low Variance Inflation Factors (VIF).

Estimation results demonstrate that firm creation in Spain operates under two fundamentally divergent logics. Across all models, higher educational attainment exerts a consistent positive impact on cooperative entry, indicating that cooperative formation requires qualified human capital capable of managing complex collective organizations. Under two-way FE models, cooperative density and the provincial manufacturing sector share exert statistically significant positive effects on cooperative formation, highlighting the role of local social economy networks and industrial specialization. Crucially, the unemployment rate loses statistical significance in the FE specifications, refuting the "refuge effect" hypothesis at the provincial scale once time-invariant province characteristics are controlled. The fixed effects parameter rho (0.908) reveals that 90.8% of error variance is attributable to structural, institutional, and historical differences across provinces. In contrast, conventional entrepreneurship (LLCs and sole proprietorships) displays strong pro-

cyclical behaviour, driven by real GDP per capita growth, service sector size, and business agglomeration density. Time dummy trajectories confirm that cooperatives demonstrate the highest relative stability against exogenous macroeconomic shocks throughout 2009-2023.

These empirical findings demonstrate that cooperative creation is not driven by short-term macroeconomic fluctuations or conventional agglomeration economies. Instead, cooperative formation depends on long-term idiosyncratic factors, institutional density, and localized social capital. The lower explanatory power of OLS models for cooperatives (R-squared = 0.39) compared to LLCs (R-squared = 0.64) and self-employed (R-squared = 0.55) reflects the complex social drivers governing social economy entities relative to commercial firms. Disaggregating data to NUTS-3 provincial levels resolves the aggregation bias present in regional NUTS-2 studies, showing that previously observed counter-cyclical entry patterns reflected regional structural baselines rather than immediate unemployment pushes.

This research advances the literature by presenting the first provincial panel data analysis of cooperative creation in Spain, proving the value of NUTS-3 data in uncovering intra-regional variance. For public policy, the findings demonstrate that generic, one-size-fits-all entrepreneurship policies are ineffective for the social economy. Policy interventions should move beyond cyclical incentives and focus on building managerial capabilities through higher education, expanding local cooperative ecosystems, and supporting worker-owned firms in industrial sectors to promote resilient, balanced territorial development.

Keywords: Cooperatives, business creation, provincial-level data, social economy, panel data

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Reimagining Cooperative Identity and Law for Sustainable Development Beyond the 2030 Agenda

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Abstract

Motivation

This session is premised on ICA Statement on the Cooperative Identity as a blend of institutional, cultural, legal as well as experiential aspects of the cooperative type. The global cooperative movement stands at a critical normative and institutional crossroads as the convergence of multiple crises such as threat to world peace, climate change, economic inequality, digital divide, and democratic erosion, has intensified the need to revisit the legal and conceptual foundations of cooperative identity. While the 1995 ICA Statement on the Cooperative Identity establishes a firm normative framework, its implementation in law has revealed significant divergences in different degrees in different parts of the world, with domestic legal regimes variably incorporating, interpreting, or overlooking its principles, often in ways that are not fully aligned with the intent of the Statement, the parts of which can be viewed as a source of law.

The 2030 Agenda for Sustainable Development of the United Nations has provided a shared global framework, yet its impending horizon raises urgent questions: What legal and institutional architectures will sustain cooperative contributions beyond 2030? How can cooperative law more effectively embody long-term, intergenerational, and ecological commitments? And to what extent does the current legal understanding of cooperative identity adequately capture evolving forms of cooperation in digital, transnational, and algorithmically mediated environments?

This session is motivated by the need to critically interrogate the relationship between cooperative identity and law as a dynamic, evolving construct, in particular but not limited to the trends observed in between the two UN International Years of Cooperatives (2012 and 2025).

Content

The point of departure for this session is a fundamental doctrinal tension: while the cooperative principles articulated in the 1995 ICA Statement on the Cooperative Identity provide a recognized normative framework, their legal implementation remains uneven across jurisdictions and regulatory levels. This gap between normative coherence and legal realization becomes particularly visible in a context marked by rapid institutional, technological, and ecological transformation.

The session approaches the Statement as a normative constant undergoing institutional translation. In this perspective, cooperative law is not only a technical field of regulation, but the primary site in which this translation occurs, mediating between principles and practice, between global norms and local legal orders, and between continuity and change.

A first line of inquiry concerns the evolution of Cooperative Identity within legal systems. Since the adoption of ILO Recommendation 193, numerous jurisdictions have undertaken reforms aimed at strengthening the legal recognition of cooperatives. However, these reforms have followed divergent

trajectories, reflecting different understandings of what cooperative identity entails. The period between the International Year of Cooperatives (2012) and its successor (2025) is particularly instructive, revealing both an expansion of cooperative forms, such as multi-stakeholder, platform, and energy cooperatives, and an increasing fragmentation of legal approaches.

This raises another question: to what extent can Cooperative Identity accommodate plurality without losing its normative specificity? The emergence of new, type-specific and technology-mediated cooperative forms challenges traditional legal categories, requiring a reassessment of how identity is defined, preserved, and adapted within law.

A second line of inquiry focuses on financing, capital formation, and group structures. Cooperative law has historically sought to reconcile access to capital with the preservation of member control and autonomy. Yet, the growing complexity of cooperative groups, investment instruments, and hybrid organizational models places increasing pressure on this balance. Legal responses vary significantly, with some jurisdictions expanding the scope for external investment, while others reinforce restrictions to safeguard cooperative principles. The doctrinal challenge lies in determining whether these developments represent a legitimate evolution of cooperative identity or a potential dilution of its core features.

Closely related is the question of cooperation among cooperatives, as reflected in the 6th ICA Principle, and its legal expression in value chains, networks, and transnational structures. As cooperatives become integrated into regional and global markets, law must address new forms of coordination, governance, and liability that extend beyond the individual entity. This, in turn, intersects with the principle of autonomy (4th ICA Principle), raising complex issues about the limits of integration, the role of algorithms in coordinating cooperative activity, and the preservation of democratic control within increasingly networked systems.

A third dimension of the session examines the multi-level character of cooperative law. Cooperative identity is no longer shaped solely within national legal frameworks, but emerges through interactions between domestic law, regional instruments, international standards, and transnational practices. This includes not only formal legal sources, but also soft law, model laws, and normative frameworks associated with the social and solidarity economy. The resulting legal landscape is inherently plural, raising questions about coherence, hierarchy, and the possibility of a shared global understanding of cooperative identity.

Within this multi-level context, the relationship between cooperative law and the legal concept of sustainable development becomes particularly salient. Cooperatives are frequently positioned as vehicles for achieving sustainability objectives, yet the integration of sustainability reporting standards into legal systems introduces new forms of external regulation. This creates a potential tension: while cooperative principles already embody social and environmental commitments, their expression may be reshaped, or even constrained, by standardized reporting requirements. The session will explore whether cooperative law can act as a normative counterpoint to these developments, preserving a more holistic and participatory understanding of sustainability.

A fourth line of inquiry addresses the intersection between cooperative identity and broader social and solidarity economy (SSE) frameworks. As legal systems increasingly recognize SSE actors, questions arise regarding the distinctiveness of cooperatives within this broader category. Does the inclusion of cooperatives within SSE law strengthen their legal position, or does it risk blurring the specific normative content of cooperative identity?

Finally, the session will engage with emerging challenges at the frontier of legal and technological change, including digitalization, platform cooperatives, and decentralized autonomous organizations (DAOs). These developments test the boundaries of cooperative law, particularly in relation to governance, membership, and accountability. They also raise deeper questions about the role of law in regulating algorithmically mediated forms of cooperation, and the extent to which cooperative identity can be preserved in such contexts.

Across these different strands, the session advances a unifying proposition: that cooperative identity, as articulated in the 1995 Statement, retains its normative force, but its legal realization is contingent upon processes of interpretation, adaptation, and institutional design that are inherently uneven. The task for cooperative law is therefore but to develop doctrinal tools capable of translating its principles across diverse and evolving contexts, while maintaining coherence and resisting dilution. Finally, the session will also reflect on the role of the International Cooperative Alliance, the global custodian of the Statement, in advancing the knowledge and practice of cooperative law.

Format

- An interactive format with structured dialogue, instead of presentations.
- Introductory framing (10 minutes): Moderator outlines key questions and conceptual tensions.
- Short interventions (12 minutes each): argument-driven contributions
- Interactive discussion (30 minutes): Open exchange, including from the floor.
- Closing synthesis (10 minutes): Identification of key insights and future research/policy directions.

Keywords: Cooperative identity; Cooperative law; Sustainable development; post-2030 agenda

Cooperatives, rural economy and decent work: The ILO's normative and policy trajectory

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Abstract

Background

Cooperatives have long played an important role in rural economies, particularly in agriculture and agri-food systems but also in a wide range of other economic activities. Within the International Labour Organization (ILO), the linkages between cooperatives, the wider social and solidarity economy (SSE) and the rural economy are not recent but form part of a long-standing normative and institutional trajectory. The establishment of a dedicated cooperative unit in the ILO in 1920 marked the beginning of sustained institutional work on cooperative development, while subsequent organizational arrangements explicitly connected cooperatives with rural institutions and employment (Sanchez Bajo, 2020). Over time, these linkages have been reflected in international labour standards, tripartite discussions, policy frameworks and technical cooperation. More recently, they have also become part of the ILO's broader work on decent work and the SSE (ILO, 2022a, 2022b, Omeira, forthcoming).

This historical trajectory is particularly relevant because many of the employment and social challenges addressed through cooperative development have a strong rural dimension. Rural economies often combine high levels of informality, limited access to markets and finance, gaps in social protection and labour administration and constraints on organization and collective voice. Cooperatives and other SSE entities have therefore featured in ILO discussions not only as economic organizations but also as possible means of supporting employment, livelihoods, organization and access to services in rural areas.

Aims

This paper examines how the ILO has conceptualized and promoted cooperatives in relation to the rural economy within its normative and policy frameworks. It traces the evolution of this approach across international labour standards, tripartitely adopted resolutions and conclusions and institutional strategies and analyses how these frameworks position cooperatives within the broader objective of advancing decent work. In doing so, the paper seeks to identify both continuity and change in the ILO's treatment of cooperatives and rural development over time.

Methods

The analysis is based on a qualitative review of ILO normative and policy instruments. These include international labour standards available through the ILO's NORMLEX database, resolutions and conclusions adopted by the International Labour Conference, Governing Body documents, policy frameworks and relevant evaluations. Particular attention is given to instruments that explicitly connect cooperatives with agriculture, rural employment or rural workers, as well as instruments whose provisions are directly relevant to the role of cooperatives and other SSE entities in rural economies.

The paper identifies explicit and implicit linkages between cooperatives and the rural economy across these materials and examines how their framing has evolved over time. Particular reference points include the Co-operatives (Developing Countries) Recommendation, 1966 (No. 127), the Promotion of Cooperatives Recommendation, 2002 (No. 193), the 2008 International Labour Conference discussion on rural employment, the ILO's 2011 rural development strategy and the 2022 Resolution concerning decent work and the social and solidarity economy (ILO, 2008, 2011, 2015b, 2022b). The analysis also draws selectively

on policy guidance, supervisory material and operational examples to illustrate how these normative and policy frameworks have been interpreted and applied in practice.

Results

The findings show that linkages between cooperatives and the rural economy have been consistently embedded in the ILO's normative and institutional work. Early instruments recognized cooperatives as mechanisms for improving livelihoods, agricultural production and social conditions in rural areas. Recommendation No. 127 reflected this development-oriented approach, while standards concerning rural workers' organizations also recognize that cooperatives can constitute one form of organization for rural workers (ILO, 2015b).

Over time, this relationship became more explicit and broader in scope. Recommendation No. 193 established an international policy framework for the promotion of cooperatives applicable across countries and economic sectors. Subsequent ILO work on rural employment, rural development and the SSE further situated cooperatives within wider decent work strategies, including in relation to informality, social protection, supply chains and resilience in rural economies (ILO, 2008, 2011, 2015a, 2022a, 2022b). The 2023 Policy Guidelines for the promotion of decent work in the agri-food sector reinforce this broader positioning of cooperatives within integrated approaches to decent work in rural and agri-food contexts (ILO, 2023).

Discussion

The analysis points to both continuity and transformation in the ILO's approach. Cooperatives have long been recognized as part of rural employment and development strategies, including through international labour standards and other tripartite texts. Over time, their role has increasingly been situated within the broader decent work agenda and, more recently, within the internationally agreed framework on the SSE. This evolution reflects a growing emphasis on integrated approaches connecting productive employment, rights at work, social protection and social dialogue.

At the same time, normative recognition does not in itself ensure implementation. Rural areas may face particular challenges related to the reach of labour administration, labour inspection, social protection institutions and other public services. In this context, cooperatives can play a complementary role by facilitating organization, access to services, awareness of rights and pathways towards formalization. This role does not substitute for the responsibilities of governments and public institutions for labour regulation, inspection, social protection or the implementation of international labour standards.

The analysis also suggests that the relationship between cooperative development and rural policy has not followed a linear trajectory. Rather, cooperatives have appeared across different strands of ILO work on employment, sustainable enterprises, workers' organization, social protection, informal economy transitions and sectoral development. The more recent SSE framework brings many of these strands together within a broader conceptual and policy approach.

Contributions and Implications

The paper contributes to understanding how cooperatives and the rural economy have been addressed within the International Labour Organization over time. It adds to cooperative studies by providing a normative and institutional perspective on cooperatives in rural economies, grounded in the ILO's mandate, international labour standards and tripartite processes.

The findings highlight the importance of coherent policy frameworks, a conducive legal and institutional environment and appropriate support measures for cooperatives to contribute to decent work in rural economies. They also point to the value of stronger articulation between rural employment policies and SSE-related legal and policy frameworks, while recognizing the complementary role of cooperatives and other SSE entities alongside public institutions and the social partners.

Keywords: Cooperatives; rural economy; decent work; international labour standards; ILO

Theme(s): Public Policy and Institutional Support for Cooperatives

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Values and principles in social and solidarity economy laws: a comparative analysis from Latin America and the Caribbean

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Abstract

Background

Countries in Latin America and the Caribbean have been at the forefront of adopting legal and policy frameworks for the social and solidarity economy (SSE). These frameworks have expanded the formal recognition of cooperatives and other SSE entities and their role in development strategies in the region. At the same time, the forms taken by this recognition vary considerably, reflecting different legal, institutional and policy traditions (ILO, 2022a; Marti et al., 2023). While cooperatives are regulated in virtually all countries in the region, broader frameworks bringing together different SSE entities under common principles, objectives or institutions remain less widespread.

A significant development in this context was the adoption by the International Labour Conference in 2022 of the Resolution concerning decent work and the social and solidarity economy (ILO, 2022a, 2022b). The Resolution established the first internationally agreed tripartite definition of the SSE. Rather than defining the SSE through a particular legal form, it identifies common characteristics related to the activities and purposes of SSE entities and the values and principles that guide their functioning. This internationally agreed framework provides a common reference point for examining how national legal frameworks conceptualize the SSE and how their normative provisions relate to the broader objective of promoting decent work.

At the same time, the existence of legal recognition does not in itself establish how effectively a framework is implemented. The distinction between normative recognition, provisions intended to support implementation and actual implementation outcomes is therefore important when assessing SSE laws and policies.

Aims

This paper examines SSE legal and policy frameworks in Latin America and the Caribbean, with a particular focus on how comprehensive national SSE laws reflect the values and principles contained in the 2022 ILO Resolution and how these are translated into legal and institutional design. It situates these laws within the wider regional landscape, compares areas of convergence and variation across the comprehensive frameworks identified in the regional mapping and examines whether normative principles are accompanied by institutional arrangements, policy instruments and other operational provisions. The analysis does not seek to rank national frameworks or assess implementation outcomes.

Methods

The analysis draws on a comparative mapping of SSE-related legal, policy and institutional frameworks in 33 countries in Latin America and the Caribbean, commissioned by the International Labour Organization (ILO) in 2025 and subsequently updated (ILO, 2022c; ILO, 2025). The database systematizes information on legal recognition of SSE entities, particularly cooperatives, relevant public policies, institutional arrangements, competent authorities, regulatory frameworks and selected mechanisms of support.

The regional mapping distinguishes comprehensive frameworks, partial or hybrid frameworks and configurations based primarily on regulation by type of entity. The detailed comparative analysis focuses on the seven countries currently identified as having comprehensive national SSE frameworks: Brazil, Colombia, Costa Rica, Ecuador, Honduras, Mexico and Uruguay. These frameworks are analysed against the

values and principles contained in the definition agreed by the ILO in 2022, identifying the levels in which they are reflected in the relevant legislation. The analysis also considers how far these values and principles are translated into institutional arrangements, policy instruments and other operational provisions within the legal frameworks themselves, while distinguishing such legal design from implementation in practice.

Results

The regional mapping shows that broader legal recognition of the SSE remains less widespread than the regulation of its constituent organizational forms, with seven of the 33 countries analysed currently having comprehensive national SSE frameworks.

The comparative analysis of these frameworks indicates substantial convergence with the values and principles identified as part of the ILO 2022 definition of the SSE, alongside variation in how these are formulated. The principles of voluntary cooperation and mutual aid, democratic and/or participatory governance, autonomy and independence and the primacy of people and social purpose over capital in the distribution and use of surpluses and/or profits as well as assets feature prominently across the frameworks, alongside the orientation towards serving the collective and/or general interest. The values associated with care for people and planet, equality and fairness, interdependence, self-governance, transparency and accountability and the attainment of decent work and livelihoods are also reflected, although some are expressed more unevenly or through operational provisions rather than explicit declarations of principle or value.

Five of the seven comprehensive frameworks predate the 2022 ILO Resolution, suggesting that many of the values and principles later reflected in the international definition were already present, in different forms, in national legal traditions (ILO, 2022a, 2022c, 2025). The frameworks also vary in the extent to which declared principles are accompanied by institutional arrangements, coordination mechanisms, support instruments or monitoring provisions.

Discussion

The findings show that, despite differences in terminology and legal tradition, the comprehensive SSE frameworks analysed share many of the values and principles reflected in the ILO 2022 definition. At the same time, they confirm that there is no single legal model for the SSE and that national frameworks have developed through different historical, constitutional and policy trajectories.

The analysis also highlights the need to distinguish between what is provided for in legislation and how these provisions are implemented in practice. Institutional arrangements, policy instruments and other operational provisions can help translate legal recognition into practice, but their presence in legislation does not in itself demonstrate effective implementation or results. Assessing this would require additional evidence on how the frameworks operate in practice and on their contribution to decent work outcomes (ILO, forthcoming; Katajamäki & Quicaña, forthcoming).

Contributions and Implications

The paper contributes to cooperative and wider SSE research by combining a regional mapping of legal and institutional frameworks with a focused comparative analysis grounded in the internationally agreed values and principles of the SSE. It highlights both areas of convergence and nationally distinctive approaches and proposes a distinction between the reflection of SSE values and principles in legislation, implementation orientation in legal design and implementation in practice.

The findings may inform further comparative research and policy discussions on how legal frameworks for cooperatives and other SSE entities can support decent work, while avoiding the assumption that formal recognition or legal design alone demonstrates effective implementation.

Keywords: Social and solidarity economy; cooperatives; values and principles; legal frameworks; Latin America and the Caribbean

Theme(s): Public Policy and Institutional Support for Cooperatives

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Investment of the Education Fund in Digital Management under the Reform of the Spanish Cooperatives Act

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Abstract

Background

To ensure that the European Action Plan for the Social Economy is reflected in the Spanish regulatory framework, the national legislature has enacted Comprehensive Act 1/2026 of 8 April, to Promote the Social Economy (LIIES).

Within the content of the legislative proposal, the first of its four articles concerns the amendment of Co-operatives Act 27/1999 of 16 July (LCOOP). Among other issues, the reform introduces legal provisions intended to enable cooperatives to implement the adjustments required to optimise the effectiveness of their internal operations, with regards to forms of participation and the exercise of digital or telematic rights by their members.

The current state of art; the acceptance and recognition of the digital environment in economic activity; the proven effectiveness of new technologies in facilitating connectivity and participation in virtual meetings and the competitive disadvantage resulting from the comparison with the legal regimes applicable to other business models with which cooperatives must compete all make it necessary to introduce provisions that normalise the use of new technologies in corporate governance and in members' participation in their co-operatives.

Accordingly, the LIIES requires co-operative societies with more than five hundred members —and allows those with fewer members, on an optional basis— to establish a corporate website serving as a portal through which all members may access information and, where applicable, the co-operative's e-office; to enable full telematic communication between members and their co-operative; to allow the remote and online exercise of information and participation rights in the co-operative's governing bodies or the possibility of convening and holding the General Assembly and the Governing Council online in real time. All these provisions require co-operative members and managers to acquire digital skills and competence in technological tools, which in turn requires adequate funding for their effective operation.

In Spain, to comply with the fifth international cooperative principle —education, training, and information—, as well as to support the co-operative principles as a whole, co-operatives have been provided with their own financing mechanism. A precedent can already be found in the decision adopted by the Rochdale Equitable Pioneers Society in 1854 to allocate annually a percentage of its net profits to education, a provision that was subsequently incorporated into its Rules. This mechanism is known as the Co-operative Education and Promotion Fund (FEP). Thus, the creation, funding and specific purposes of the FEP are provided for in the substantive national co-operative legislation (Article 56 LCOOP) and in each of the regional co-operative laws —although it is recognised under different names—; in the special legal regime governing credit co-operatives (Article 8.3 of Act 13/1989 of 26 May); and in the specific co-operative tax regime (Articles 18 and 19 of Act 20/1990 of 19 December on the Tax Regime of Cooperatives, LRFC).

The LIIES advocates a limited expansion of the possible uses of the FEP in 'cases of objective exceptionality' relating to the co-operative's financial situation and its wider context. Nevertheless, maintaining the purposes currently assigned to the FEP makes it possible to accommodate its use within the innovative approach to digital management and operation envisaged for co-operatives.

One problem arising from regulatory diversity, as a consequence of regional competence in the legislative regulation of co-operatives in Spain, concerns the different purposes legally established for the FEP and the fact that supervision ultimately falls to the State Tax Authority, which is responsible for assessing whether the use of the fund is in line with the purposes it considers consistent with the law.

The LIIES also provides for a partial amendment of the LRFC, which establishes the rules governing supervision of the use of the FEP. However, the proposed reform is limited to the inclusion of an additional class of co-operative for the purposes of granting it tax-protected status.

It would have been desirable for the Act to undertake a broader reform of the co-operative tax regime to clarify and specify the criteria governing assessment of the purposes for which the FEP may be used, thereby avoiding penalties and the loss of tax-protected status.

Aims

To analyse the scope of the legislative reform introduced by the LIIES concerning forms of participation and the exercise of digital or online rights within co-operatives.

To determine the suitability of the FEP as a financing instrument for the effective digitalisation of co-operatives and for the acquisition of digital skills by their members and managers.

To assess whether the proposed tax reform of the Act on the Tax Regime of Cooperatives (LRFC) is sufficient regarding the supervision of the use of the FEP and the legal certainty surrounding such use.

To formulate proposals for legislative improvement at both national and regional level that harmonise the new digital obligations with existing financing mechanisms.

Methods

Analysis of the legislative process leading to the LIIES.

Review of the national and comparative legal framework concerning digitalisation and the allocation and purposes of the FEP.

Review of the specialised academic literature.

Critical analysis of the relationship between the new digital obligations and the operational capacity of the FEP.

Results

In light of the final provisions of the LIIES, the substantive digital obligations introduced by the Act require specific funding. It is found that, although the FEP constitutes an appropriate mechanism for complying with the fifth co-operative principle of education, training and information, the reform introduced by the LIIES remains limited. Although the permitted uses of the fund are expanded to cover situations of objective exceptionality, the tax reform remains insufficient.

Proposals will also be made for future reforms of the regional legislation on co-operatives.

Discussion

The discussion focuses on the legislative paradox involved in imposing advanced digitalisation without providing a sufficiently secure tax framework through which it can be financed using the FEP. The success of the digital transition within co-operatives depends not only on the substantive legislation (LCOOP), but also on a comprehensive tax reform clarifying and specifying the criteria governing the permitted uses of the fund to prevent penalties.

The main challenge lies in the disparity in the purposes assigned to the FEP across the different autonomous communities and in the supervision exercised by the Tax Authorities, which creates a situation of unequal treatment and legal vulnerability.

Contributions and Implications

Development of legislative proposals aimed at strengthening legal certainty and tax certainty.

Keywords: Co-operative law; digitalisation; co-operative education fund; legislative policy; Comprehensive Act to Promote the Social Economy

Theme(s): Cooperative Law; Technology, Digitalization, and Platform Cooperatives

Who Benefits from Associative Integration? Evidence from Spain's Priority Associative Entities under Law 13/2013

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Abstract

Background

Spanish agri-food cooperatives face increasingly concentrated retailers from a fragmented position: they average only €10.8 million in turnover (OSCAE, 2024), far from the scale of Northern European cooperative groups, and fragmentation is a structural weakness across Europe (Bijman et al., 2012). Law 13/2013 sought to remedy this by encouraging large, supra-regional structures to strengthen farmers' market position and income (Meliá Martí & Peris Mendoza, 2017). Entities above a legal turnover threshold can be recognized as Priority Associative Entities (PAEs), gaining preferential access to public funding.

Recognition opens a dedicated line of investment aid: about €250 million under the National Rural Development Programme 2014–2022 and €100 million under the CAP Strategic Plan 2023–2027. Yet PAEs have only been analyzed descriptively, leaving unclear whether recognition improves their performance and benefits farmers.

Aims

We estimate the causal effect of PAE recognition on the economic, strategic and social performance of the 22 PAEs still active (out of 25 recognized since 2015), net of pre-existing size differences and common sectoral shocks. We also examine whether benefits reach members and, since aid is received only by the recognized entity, whether in second-degree PAEs these advantages cascade down to their member cooperatives.

Methodology

Data

An unbalanced 2010–2025 panel covers 1,622 of the 3,669 agri-food cooperatives and Agricultural Processing Companies (SATs) that are members of Cooperativas Agro-alimentarias de España, combining SABI annual accounts, OSCAE data on members, exports and employment (2016–2024) and the Ministry of Agriculture's recognition register. Thirty variables cover seven dimensions: scale, internationalization and diversification, efficiency and value for members, generational renewal, gender equality, employment, and investment and resources (Table 1).

Identification strategy

PAEs were far larger than average before recognition, which was staggered over a decade (nine cohorts, 2016–2025). Since two-way fixed effects (TWFE) then use already-treated units as controls and can be biased (Goodman-Bacon, 2021), we apply the Callaway and Sant'Anna (2021) estimator. For each cohort g and period t:

$$ATT(g,t) = E[Y(t) - Y(g-1) \mid G = g] - E[Y(t) - Y(g-1) \mid C]$$

where C contains never-treated and not-yet-treated cooperatives. Each ATT(g,t) uses the doubly robust estimator of Sant'Anna and Zhao (2020) and is aggregated into overall, cohort and event-time effects with bootstrapped standard errors.

Levels of analysis and robustness

We estimate effects for first-degree (14) and second-degree PAEs (8), each against same-degree controls, for all PAEs (22), and for the 173 member cooperatives of second-degree PAEs. Robustness checks include pre-trend event studies, cohort decomposition, early cohorts (2016–2020), TWFE with sector × year and region × year effects, and Rambachan and Roth's (2023) sensitivity analysis.

Results

The clearest and most robust effect (Table 1) concerns public resources: capital grants as a share of tangible fixed assets rise by 8.9 percentage points across all PAEs ($p < 0.001$), 8.7 pp in first-degree ($p < 0.001$) and 6.3 pp in second-degree entities ($p < 0.05$).

Recognized entities also grow: total assets rise 85.7% ($p < 0.05$; 50.1% in first-degree PAEs, $p < 0.001$) and turnover 62.3% ($p < 0.05$), driven by second-degree PAEs (+127.7%), although the latter could be affected by a 2016 change in control-group composition; however, a subsequent analysis keeping a constant sample of entities yields the same results, which validates these estimates.

Part of this growth reaches individual member producers. The member result, what member producers receive for their deliveries plus the business result (net income plus supplies), estimated only for marketing cooperatives (supply cooperatives are excluded), rises 38.7% ($p < 0.01$), whereas the member margin, the share of each euro of revenue returned to members, does not change significantly. Value added rises 81.5% ($p < 0.10$), but not robustly to regional controls.

Export intensity rises 1.1 pp in first-degree PAEs ($p < 0.10$), robust to sectoral controls, whereas the rise in export value (+46.2%) disappears with sector × year effects.

There are no significant effects on membership, young members, women's participation, employment or diversification. In the first-degree cooperatives associated with second-degree PAEs, the cascade effect is only partial: their turnover rises 88.4% ($p < 0.01$) and asset turnover declines ($p < 0.05$), while the other indicators show no significant change.

Discussion

Law 13/2013 thus acts mainly through funding and as an incentive to invest in productive assets that foster industrialization and innovation: recognition accelerates an asset growth that, relying on borrowing alone, would have been slower. Effects take three to five years to consolidate, and pre-recognition trends reveal a selection effect: PAE recognition accelerates integration already under way, since it is granted to entities that were already large, so the PAEs' cost and profitability advantages reflect both their prior size and recognition.

Members thus receive more in total, through volume and fixed-cost dilution (Meliá-Martí et. al. 2024), but the member margin does not increase, although the growth of their cooperatives, usually brings better services to members. The law works where it has a concrete instrument (access requirements, the aid line) and loses traction where it lacks one: Article 4 extends preferential access to public aid to producers as well, but only some regional decrees implement it.

The social dimension is one of the law's blind spots: there is no evidence that integration has improved the capacity to attract new, younger or female members, possibly owing to insufficient communication and outreach about what these structures represent.

Contributions and Implications

First, the study offers, to our knowledge, the first causal evidence on Law 13/2013, robust to size selection, sectoral cycles and regional shocks: the law has built larger, better-capitalized cooperatives, chiefly through investment aid.

Second, it applies to cooperative policy a heterogeneity-robust staggered difference-in-differences estimator, better suited than conventional TWFE, whose estimates can be biased when treatment is staggered over time.

Third, it shows that benefits concentrate in the lead entity, cascading only partially to member cooperatives (mainly through turnover), and that recognition does not bring with it a greater capacity to attract young or female members. Implementing Article 4 and adding generational-renewal measures would align the instrument with its aims, a lesson for CAP producer-integration policies.

Note: This research is part of a study commissioned by Cooperativas Agroalimentarias de España.

Table 1. Estimated effect of PAE recognition (ATT, Callaway & Sant'Anna staggered difference-in-differences, 2010–2025)

Dimension	Variable (unit) *Definition*	First-degree PAEs	Second-degree PAEs	Total PAEs	Member coops (cascade)	Robustness of the main effect
Scale and integration	Turnover (€ thousand, log) *Net sales (SABI, completed with OSCAE)*	+9.5	+127.7**	+62.3**	+88.4***	Medium: 2016 composition effect
	Total assets (€ thousand, log) *Balance-sheet total*	+50.1***	+98.2	+85.7**	+3.6	High
	Number of members (members, log) *Total members*	−29.9	−28.0	−30.6	−2.6	No effect
Internationalization and diversification	Export intensity (%) *Export sales / turnover*	+1.12*	+1.60	+1.35	−0.53	Medium: robust to sector × year
	Export value (€ thousand, log) *Export sales*	+62.4**	+22.4	+46.2*	+51.5	Not robust: sectoral cycle
	Diversification (subsectors) *Number of subsectors (1–11)*	+0.02	−0.86	−0.21	−0.04	No effect
Efficiency and value for members (in marketing cooperatives)	Member result (€ thousand, log) *Net income + supplies*	—	—	+38.7***	−8.6	Medium
	Member margin (%) *Member result / turnover*	—	—	−1.28	−2.34	No effect
	Value added (€ thousand, log) *Turnover − supplies*	—	—	+81.5*	+131.2	Low: region × year
	Asset turnover (times) *Turnover / total assets*	—	—	−0.805	−0.397**	Low (cascade)
Generational renewal	Members under 40 (%) *Members under 40 / total members*	−0.33	—	−0.34	—	No effect
Gender equality	Women on board (%) *Women board members / total board members*	+0.18	+7.51	+2.97	+1.35	No effect
Employment	Employees (FTE, log) *Permanent +*	+9.4	+216.1	+84.9	−6.3	No effect

	0.5 × (temporary + seasonal)					
Investment and resources	Capital grants / tangible assets (%) *Capital grants (equity) / tangible fixed assets*	+8.67***	+6.28**	+8.89***	−0.52	High: most robust
	Debt ratio (%) *Total liabilities / (equity + liabilities)*	+5.02	−17.90	+3.07	−0.13	No effect
Treated entities		**14**	**8**	**22**	**173**	

Note: Each degree is compared with same-degree controls; cascade = 173 member cooperatives of second-degree PAEs. Effects: log variables, % difference from the counterfactual, exp(ATT) − 1; % variables, percentage points; times and subsectors, absolute difference. Supplies = purchases, mainly from members. Member result and margin: non-supply PAEs. —: not estimated. *** p < 0.01; ** p < 0.05; * p < 0.10.

Source: Authors' own work based on SABI, OSCAE and MAPA.

Keywords: agricultural cooperatives · policy evaluation · associative integration · staggered difference-in-differences · Spain

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Bridging the Implementation Gap: Legal and Institutional Barriers to Energy Cooperatives in Poland

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Abstract

Background

The transition toward low-carbon energy systems has reshaped the role of local self-governments across the European Union. In Poland, this transition has introduced elements of a more decentralised and participatory model of energy governance into a historically centralised energy system. Energy cooperatives have emerged as an organisational form supporting decentralised energy production, local energy management, and community participation (Koltunov et al., 2023; Wierling et al. 2018).

The development of energy cooperatives in Poland has followed a distinctive legal trajectory. Their legal framework was introduced in 2016, before the EU framework explicitly recognising renewable energy communities and citizen energy communities. As a specific form of cooperative organisation, energy cooperatives are embedded in the broader framework of Polish cooperative law, while their establishment and operation are subject to specific provisions of the Renewable Energy Sources Act. Their subsequent development has taken place within an evolving European legal framework and specific national and local conditions. The emergence of energy cooperatives therefore raises new questions for the application of Cooperative Law, as cooperative organisations operate within an energy sector historically shaped by more centralised forms of production and market organisation. Despite a formal legal framework, significant barriers have emerged in practice, particularly in rural municipalities.

Aims

The paper examines legal barriers affecting the establishment and operation of energy cooperatives in Polish rural municipalities and the relationship between the formal regulatory framework and its practical implementation. It asks what types of legal barriers emerge locally, how they affect cooperative development, and how subsequent regulatory changes have responded to problems identified in practice.

Methods

The study combines doctrinal legal analysis with qualitative empirical research. The legal analysis focuses on EU law and Polish legislation, particularly the Renewable Energy Sources Act and subsequent amendments concerning energy cooperatives. The empirical component comprises a single case study of the government-initiated project *Rural Development through Renewable Energy Sources – Renew(able) your Region – RENALDO*, which involved six rural municipalities in which the establishment of energy cooperatives was planned. Data were collected through 20 in-depth interviews, participant observation, and document analysis, and analysed thematically following Braun and Clarke (2019).

The research draws on the law-in-action perspective, distinguishing formal legal rules from how law operates in practice (Pound, 1910), and the concepts of responsive law and responsive public administration (Nonet, Selznick & Kagan, 2017; Stępień, 2008). Together, these perspectives enable analysis of the interaction between formal regulation, its practical application, local administrative practice, and subsequent regulatory adjustment.

Results

The findings identify four interconnected categories of barriers: normative, institutional, relational, and competency-related. Normative barriers include ambiguity, inconsistency, and uncertainty in interpreting

and applying legal provisions. Institutional barriers concern the relationship between the regulatory model of energy cooperatives and existing municipal structures and administrative procedures. Relational barriers arise from difficulties in cooperation between cooperatives, municipalities, and energy market actors, including asymmetries in knowledge, responsibilities, and negotiating positions. Competency-related barriers concern limited access to specialised legal, technical, financial, and organisational knowledge. The findings indicate the existence of an implementation gap, understood as a discrepancy between formal regulatory arrangements and their practical application at the local level. This gap was multidimensional, encompassing not only regulatory challenges but also institutional, organisational, and competency-related conditions affecting the implementation process (Matland, 1995). The case further demonstrates how implementation experience generated practical knowledge that informed both complementary support mechanisms and subsequent regulatory adjustment, illustrating the role of policy learning in closing the gap between formal rules and their practical application (Bennett & Howlett, 1992).

The empirical evidence further shows that some practical difficulties were not fully visible at the stage of regulatory design. Their identification during implementation generated practical knowledge about the functioning of the legal framework and contributed to recommendations for subsequent regulatory changes. The development of the legal framework has therefore been an incremental process in which implementation experience has informed regulatory adjustment.

Discussion

The Polish case demonstrates that a formal legal framework does not by itself guarantee favourable conditions for energy cooperatives. The practical effectiveness of cooperative law depends on the clarity and consistency of legal provisions, their compatibility with institutional arrangements, and the capacity of local actors to apply them. This is particularly relevant because energy cooperatives operate across different legal and institutional frameworks, including cooperative law, specific legislation governing energy cooperatives, municipal governance, and relations with energy market actors.

These implementation challenges can also be understood in the context of the broader transformation of energy governance. Decentralised and participatory forms of energy organisation introduce cooperative actors into a sector whose legal and institutional arrangements have historically been oriented towards more centralised production and market organisation. This creates a need for legal rules and administrative practices capable of accommodating new organisational forms while remaining workable within existing institutional structures.

Recent legislative amendments, particularly those introduced after 2023, have partially addressed previously identified regulatory gaps affecting energy cooperatives (Directive (EU) 2023/2413; CEER, 2025). Nevertheless, regulatory development remains a continuing process. Viewed through these perspectives, the case illustrates how implementation experience and local administrative practice can inform subsequent regulatory adjustment and the gradual development of the legal framework for energy cooperatives.

Contributions and Implications

The paper contributes to research on Cooperative Law and Energy Cooperatives by examining a nationally established legal model in the context of subsequent European regulatory change and local implementation. It highlights the importance of distinguishing between the origins of the Polish energy cooperative model and its later development within the EU regulatory environment. The study shows how local implementation can reveal legal barriers and inform subsequent regulatory adjustment. It further suggests that effective legal frameworks require not only a clear formal basis for establishing energy cooperatives but also rules workable within the institutional and organisational conditions in which cooperatives operate.

Keywords: energy cooperatives; cooperative law; energy transition; implementation gap; responsive public administration

Theme(s): Cooperative Law; Public Policy and Institutional Support for Cooperatives

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Cooperativism as a Driver of Territorial Cohesion in Galicia: An Analysis of its Economic Dimension and Local Impact

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Abstract

Background

In recent years, the Social Economy has been recognized as a business model capable of combining economic efficiency with goals of equity and sustainability. Within this framework, cooperatives stand out for their ability to generate stable employment and sustain economic dynamics in vulnerable territories. Several academic studies provide evidence of this role in Spain (Martínez et al., 2023) and Galicia (Bastida et al., 2020; Santero et al., 2022). The Social Economy is also institutionally supported by Law 5/2011 on SE in Spain and Law 6/2016 on SE in Galicia, alongside various strategic plans developed at European, national, and regional levels.

Galicia has seen a steady increase in the number of social economy entities since 2008, particularly in the number of active cooperatives, even during periods of economic crisis (Bastida, Olveira-Blanco, & Savall, 2020). Regional government support through Social Economy strategies—most recently the 2024 strategy (EGAES H27)—acknowledges that collective entrepreneurship is a key mechanism for anchoring the population to the territory. This research emerges from this context, derived from the project "Cooperativism in Galicia: Economic Dimension and Territorial Cohesion" funded by the *Xunta de Galicia (DG de Trabajo Autónomo y Economía Social)*. The study interprets cooperativism not merely as an aggregate of firms, but as a strategic tool for resilience against challenges such as depopulation, aging, and the imbalance between the Atlantic axis and the inland regions.

Aims

The main objective of this paper is to provide a comprehensive overview of cooperativism in Galicia by assessing its presence within the regional business ecosystem and labour market, as well as its specific contribution to territorial cohesion. Specifically, it analyzes the geographical distribution of cooperatives based on demographic density criteria (rural vs. urban areas) and assesses the differential impact of cooperativism across Galician sub-regions, local administrative areas (comarcas) through the creation of a Synthetic Indicator of Cooperative Development.

Methods

To achieve the research objective, we developed the *Abay Analistas Cooperative Database*, an original dataset purpose-built for this study. The database was compiled fromasis of information provided by the Register of Cooperatives of Galicia and enhanced through a systematic process of data cleaning and enrichment using information from external sources (Galician Institute of Statistics, 2022, 2025). The territorial dimension was measured using DGURBA (Degree of Urbanisation), Eurostat's classification that groups municipalities into rural, intermediate, and urban areas.

The key contribution of this research is the construction of the Synthetic Indicator of Cooperative Development. Specifically designed for this study, the indicator provides a comprehensive measure of cooperative development across Galicia's 53 comarcas by combining three weighted dimensions: 1) the relative presence of cooperatives per inhabitant; 2) the weight of cooperatives within the Galician business ecosystem; and 3) the relative weight of cooperative employment. Based on the resulting scores, comarcas are classified in different groups by levels of cooperative development. This classification is subsequently

used to compare the socioeconomic and demographic characteristics of the territories, allowing us to examine whether different levels of cooperative development are associated with distinct patterns of regional development. This methodological approach identifies territories where, despite moderate absolute figures, cooperativism maintains critical structural relevance.

Results

An initial descriptive analysis of the database highlights the main structural features of the Galician cooperative sector. In 2024, Galicia has 1,164 active cooperatives employing 11,560 people, representing 1.3% of total employment. The primary sector is the main protagonist, concentrating 48.4% of all cooperative employment. The results reveal strong roots in rural areas, where 69.4% of agri-food cooperatives are located.

The Synthetic Indicator of Cooperative Development identified 15 comarcas with "high or very high" cooperative development, 93.3% of which are inland regions. These areas are characterized by adverse demographic conditions, with a median population of 13,038 and a high ageing index (36.9% of the population is over 65). Despite this context, cooperativism acts as an economic leveling factor: per capita income in these highly developed cooperative regions is comparable to that of more dynamic urban regions. Furthermore, their unemployment rate (7%) shows no significant variation compared to areas with less cooperative presence, suggesting a "buffer effect" against demographic decline.

Additionally, in rural and intermediate comarcas, cooperatives diversify their activity beyond the primary sector to sustain essential basic services: 23 cooperatives are dedicated to education (244 jobs), with a significant presence in social services, transport, and retail. In contrast, urban cooperativism (659 entities) is mostly oriented toward the service sector and self-employment.

Discussion

The findings confirm the existence of two models of cooperativism in Galicia: a rural-agrarian model, vital for population retention, and an urban-services model, which is more atomized and dynamic in terms of social innovation. The discussion focuses on the "compensatory function" of cooperativism in inland Galicia. While conventional for-profit companies tend to concentrate along the Atlantic axis (coastal areas), cooperatives show greater resilience in vulnerable areas, leveraging endogenous resources and maintaining social infrastructures that would otherwise disappear. However, the study also reflects the fragility of these inland structures when they lack medium or large-sized cooperatives to act as economic drivers.

Contributions and Implications

This research represents an unprecedented territorial diagnosis of cooperativism in Galicia. The primary contribution is the construction of the Synthetic Indicator of Cooperative Development as an evaluation tool for public policy, allowing for the identification of the specific needs of each comarca.

From a policy perspective, the findings suggest that regional development strategies should adopt a differentiated approach to cooperative support. In urban areas, where service cooperatives predominate, policies should prioritize diversification, innovation, and the creation of quality employment opportunities for younger generations. In contrast, rural cooperatives face challenges related to business scale, competitiveness, and demographic decline. Beyond these territorial differences, the findings point to cooperative size as a key determinant of performance. Consequently, public policies should foster growth-oriented strategies and frameworks that facilitate expansion, cooperation, and consolidation processes, helping cooperatives achieve the scale necessary to strengthen their competitiveness and long-term viability. Complementary measures promoting digitalization and generational renewal would be particularly relevant in rural contexts, where demographic and structural constraints remain significant.

Conclusions

In conclusion, cooperativism should not be understood merely as an economic actor but as a strategic mechanism for fostering inclusive and sustainable territorial development. The evidence from Galicia shows that cooperatives contribute to reducing territorial disparities, strengthening local resilience, and supporting balanced regional development, particularly in areas facing demographic and economic challenges.

Keywords: Cooperativism; territorial cohesion; local impact; cooperative development; population retention

Theme(s): Public Policy and Institutional Support for Cooperatives; Measuring Impact and Performance of Cooperatives

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5. Impact, Performance and Cooperative Banking

Research streams: Measuring Impact and Performance of Cooperatives · Cooperative Banks and Mutual Insurers

8 contributions

Are Cooperative Enterprises More Gender-Equal? A Comparative Wage Gap Analysis

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Abstract

Background

Despite substantial progress in women's labour market participation, educational attainment and occupational advancement, gender wage inequality remains a persistent feature of the Spanish labour market. According to the Structure of Earnings Survey (INE), Castilla-La Mancha records a gender pay gap of 15% in average gross annual earnings, making it the fourth Spanish region with the lowest observed gap and placing it 3.3 percentage points below the national average. However, aggregate indicators provide only a partial picture, as they do not account for differences in workers' characteristics, employment conditions or firm-specific factors. This limitation is particularly relevant in the Social Economy and, more specifically, in cooperative enterprises, whose organisational principles emphasise equality, participation and inclusion.

Aims

This study examines the extent to which gender wage gaps persist within cooperative enterprises in Castilla-La Mancha and identifies the factors driving these differences. Particular attention is paid to the role of vertical and horizontal occupational segregation, individual and firm characteristics, contractual arrangements, and employment interruptions throughout workers' labour trajectories.

Methods

The analysis relies on administrative microdata from the Continuous Sample of Working Histories linked to fiscal records (MCVL-CDF, 2024), which enables the identification of cooperative firms and the reconstruction of detailed employment histories. To explore gender-related wage differentials, the study combines statistical and visual analytical techniques, including density distributions, boxplots and violin plots, allowing the examination of disparities across the entire wage distribution and across key individual, occupational and organisational dimensions.

Results

Preliminary findings reveal that gender wage gaps persist within cooperative enterprises even after accounting for observable characteristics. Moreover, the magnitude of these disparities varies considerably along the earnings distribution, suggesting that wage inequality is shaped by a combination of occupational segregation patterns, workers' employment trajectories and firm-level characteristics.

Discussion

These results indicate that, despite their commitment to equality-oriented values, cooperative enterprises are not immune to the structural gender inequalities that characterise broader labour markets. By providing novel microdata-based evidence on gender wage disparities within the cooperative sector, this study contributes to the literature on gender equality and the Social Economy while offering valuable insights for the design of evidence-based policies aimed at fostering more equitable labour market outcomes.

Keywords: Gender wage gap; Cooperatives; Labour market; Continuous Sample of Working Histories (MCVL); Castilla-La Mancha

Theme(s): Measuring Impact and Performance of Cooperatives; Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

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Social Economy and the Humanization of Care: A Conceptual Approach from the Perspective of Healthcare Management

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Abstract

Background

European healthcare systems rely predominantly on public provision, whose role is essential to guaranteeing universality, equity and access to healthcare. Alongside public provision, Social Economy organizations participate in the delivery of healthcare and social care services through organizational models that incorporate principles such as participation, the reinvestment of surpluses, strong community ties and the centrality of the person (Borzaga & Fazzi, 2014; Chaves Ávila & Monzón Campos, 2021). In recent years, the humanization of care has gained increasing relevance in the literature and in healthcare policies. However, there are still few studies examining how the organizational principles of the Social Economy, particularly those related to the protection and promotion of human dignity and present in Social Economy entities operating in the healthcare sector, can be translated into management criteria capable of fostering the humanization of care and incorporating patient experience as a criterion for organizational improvement, with the potential to generate social value and provide lessons transferable to the healthcare system as a whole.

Aims

This study addresses this gap by posing two research questions. The first question explores how certain organizational principles, characteristic of many Social Economy entities, can contribute to creating conditions that foster the humanization of care.

The second research question examines what the analysis of an illustrative case, such as Fundación Matia, can contribute to understanding how these organizational principles can be translated into management criteria oriented towards the humanization of care.

The literature shows that there is no universally accepted definition of the humanization of care. However, there is growing convergence around the view that it goes beyond the technical quality of care and incorporates respect for the dignity, autonomy, values, preferences and experiences of the people receiving care, within organizations capable of sustaining person-centered care relationships (Busch et al., 2019; Reyes-Téllez et al., 2024).

This perspective draws on contributions from person-centered care, patient experience and person-centered healthcare system models, and is therefore adopted in this study as an operational definition constructed from the state of knowledge rather than as the proposal of a single author. From this perspective, humanization does not depend exclusively on the attitudes of healthcare professionals. It is also conditioned by the organizational decisions that make care consistent with these principles, as proposed by Pascuci et al. (2017) through the integration of the individual, organizational and social dimensions of care. Based on these considerations, the study proposes a definition that incorporates organizational and organizational culture aspects, patient experience, and the dignity of the person in healthcare.

Methods

The study adopts a conceptual design supported by a narrative literature review and documentary analysis of Fundación Matia as an illustrative case. The objective is not to demonstrate causal relationships or evaluate healthcare outcomes, but rather to explore how certain organizational principles can be embodied in management models oriented towards the humanization of care. The choice of Fundación Matia responds to its track record in developing person-centered care models and to the availability of institutional information that makes it possible to analyze how these principles are reflected in its management model. This trajectory has previously been described in studies of its organizational transformation process (Amunarriz & Alcalde-Heras, 2022). Additionally, Fundación Matia has been examined in previous academic studies within the field of the Social Economy, making it possible to contextualize the present analysis within an existing research avenue. The analysis is illustrative in nature and does not seek to represent Social Economy organizations as a whole.

Results

Based on the literature reviewed and the conceptual analysis undertaken, this study proposes that the potential contribution of the Social Economy to the humanization of care depends less on the legal nature of organizations than on certain organizational mechanisms that can foster person-centered care.

These include participatory governance, capable of incorporating the voices of patients, families and professionals and integrating patient experience into decision-making and organizational improvement; an orientation of resources towards continuous improvement in care and continuity of care, facilitated in many Social Economy entities by the reinvestment of surpluses; integration with the community environment to strengthen care coordination; and an organizational culture that places the person and their dignity at the center of care provision.

Rather than guaranteeing humanization in themselves, these mechanisms contribute to creating organizational conditions that favor more humane and sustainable care, in line with the approaches to person-centered health systems proposed by Nolte, Merkur and Anell (2020), with the potential to generate social value for patients, workers and stakeholders as a whole.

Fundación Matia is incorporated into the analysis as an illustrative case that makes it possible to show how these mechanisms can be reflected in an organizational model oriented towards person-centered care. The documentary analysis shows consistency between the organizational principles articulated in its institutional discourse and the proposed conceptual framework, without allowing causal relationships to be established or the findings to be extrapolated to Social Economy organizations as a whole. In this regard, the value of the case lies in providing an example that facilitates understanding of the conceptual proposal and serves as guidance for future research incorporating broader contextual frameworks.

Discussion

This study proposes a conceptual framework that shifts the analysis of humanization from the individual behavior of healthcare professionals towards the organizational conditions that can make it possible. From this perspective, humanization is also understood as a management challenge, in which decisions concerning governance, participation, the organization of care and relationships with the surrounding environment can influence the experience of people receiving care. This approach makes it possible to interpret the Social Economy not as an alternative model of care provision, but as a field from which to identify organizational principles that may be transferable to other healthcare organizations, regardless of their legal nature, within a logic of complementarity already described for Social Economy organizations in the healthcare sector (Calo et al., 2019). In this sense, the study proposes a complementary relationship between organizational models, aimed at enriching the management of care and generating new lines of research into the contribution of organizational design to the humanization of care.

The study has some limitations. Due to its conceptual nature, it does not include empirical validation of the proposed relationships or a comparison between different organizational models. Likewise, the

consideration of a single illustrative case limits the possibility of drawing generalizable conclusions for the sector as a whole. This conceptual framework will need to be tested through empirical studies incorporating organizational indicators, measures of patient experience and health outcomes. Nevertheless, the study offers a conceptual proposal that can serve as a basis for future empirical research aimed at understanding how certain organizational principles can contribute to the humanization of care, both in Social Economy entities and in other healthcare organizations.

Keywords: Social Economy; Humanization of care; Healthcare management; Person-centered care; Patient experience

Theme(s): Measuring Impact and Performance of Cooperatives

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Re-embedding Finance into Society: Value Practices and Ethical Governance at Banca Etica

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Abstract

The 2008 Global Financial Crisis exposed the ethical and institutional consequences of financialisation, including the growing orientation of banks towards liquidity, speculative returns, and short-term profitability rather than the financing of productive activity. Critical scholarship has extensively documented these transformations, yet a question remains insufficiently examined: through which organisational practices can finance be redirected towards social purposes? Karl Polanyi's account of the disembedding of economic activity and the emergence of protective countermovements offers a useful point of departure (Polanyi, 1944/2010). Nevertheless, ethnographies of finance remind us that markets are never literally detached from social relations; they are organised through particular institutional arrangements and normative commitments (Ho, 2009). Re-embedding should therefore be understood not as restoring a previously value-free financial system to society, but as reorganising financial relationships around alternative values and forms of accountability. Ethical and cooperative banks offer an important setting for studying this process because their commitments to democratic participation, social justice, and environmental sustainability must be enacted within the same regulatory and competitive environments as other banks.

This paper examines how ethical commitments become organisational practices capable of reshaping the credit relationship. Drawing on a qualitative case study of Banca Popolare Etica, an Italian cooperative bank, it asks: how are values like integrity, responsibility, and affinity enacted through everyday value practices, and how do these practices contribute to re-embedding finance in social and ethical relations? The analysis focuses on the mechanisms through which norms affect interaction, assessment, decision-making, and obligations over time. It also considers the tensions created when participatory judgement and long-term commitments encounter pressures for standardisation, efficiency, and liquidity.

The article combines an anthropological perspective on financial institutions with organisation and business-ethics scholarship. Its empirical foundation is a long-term qualitative engagement with Banca Etica, including participant observation undertaken across research and voluntary roles, documentary analysis, and fourteen semi-structured interviews conducted in 2022 with board members, managers, employees, and cooperative members. The bank, founded in 1998, operates through a cooperative, multistakeholder governance model in which members participate in institutional decision-making. Analysis proceeded through active categorisation, moving iteratively between ethnographic observations, interviews, documents, and theory (Grodal, Anteby, and Holm, 2021). A temporal bracketing strategy (Langley, 1999) traced the credit relationship from initial engagement with prospective clients, through loan assessment, to the management of credit after disbursement. This approach identified recurring practices and examined how different organisational actors mobilise ethical commitments at successive points in lending. The analysis uses the concept of value practices to investigate how organisational values are accomplished through situated actions rather than merely declared (Gehman, Treviño, and Garud, 2013).

The findings identify three interconnected value practices that organise the bank-client relationship and institutionalise integrity, responsibility, and affinity (Cowton, 2002). First, Critical Financial Education operates through reflexive and normative alignment. During initial encounters, employees invite prospective clients to consider their financial limits, the consequences of borrowing, and the social uses of their savings. Educational initiatives also extend beyond the branch into public discussions about finance.

This practice encourages clients to interpret financial choices as ethical and political acts; it can discourage unsustainable borrowing and cultivate shared commitments, but it also establishes boundaries: clients whose expectations diverge from the bank's values may withdraw or be excluded from the relationship. Education therefore simultaneously empowers, selects, and moralises.

Second, Relational Credit Assessment incorporates contextual and participatory judgement into credit allocation. Alongside conventional financial analysis, the bank undertakes a Socio-Environmental Evaluation of organisations seeking loans, considering such factors as labour conditions, gender equity, environmental effects, and local relationships. Trained cooperative members carry out these assessments, bringing situated knowledge into a process that might otherwise depend principally on professional or quantitative expertise. Members' assessments inform formal lending decisions, making member participation consequential rather than purely symbolic. This mechanism translates the bank's normative mandate into judgements about which economic activities merit support. Yet voluntary assessment also creates tensions around timeliness, consistency, and professional accountability.

Third, Credit as a Durable Social Contract extends ethical commitments beyond loan approval. Banca Etica's orientation towards retaining performing loans rather than trading them on secondary markets preserves an ongoing relationship between creditor and debtor. Staff describe engagement with borrowers facing difficulties, including renegotiation and tailored repayment arrangements, as part of their responsibility to the people and organisations financed. Credit is thereby treated as a durable obligation requiring mutual commitment, rather than only a liquid asset. This orientation comes into conflict with regulatory incentives and capital requirements that can favour standardised risk treatment and disposal of distressed exposures. The bank's recent decision to sell non-performing loans further illustrates that the durability of relational commitments is negotiated under institutional pressure, not guaranteed.

Taken together, the three practices reveal that the social character of credit is not secured by ethical intentions alone. It has to be reproduced across a sequence of interactions: making financial choices discussable, bringing community-based judgements into lending decisions, and sustaining responsibility after loans are granted. The practices do not simply add moral considerations to an otherwise unchanged banking model; they affect who participates in financial decisions, what counts as relevant knowledge, and how responsibilities are allocated. Cooperative governance is crucial because it provides organisational channels through which members can shape evaluations and hold the institution to its mission. At the same time, the findings complicate any straightforward opposition between ethical and mainstream finance. Normative alignment can become exclusionary; participatory assessment can conflict with professional standardisation; and relational lending remains constrained by capital regulation and market conditions. Re-embedding is therefore better conceptualised as processual, contested, ongoing organisational work rather than as a completed institutional achievement.

The study makes three contributions. First, it advances business-ethics research by specifying how espoused values are transformed into value practices with observable consequences for organisational decision-making. Second, it demonstrates that participatory cooperative governance is not merely an institutional ideal but a condition enabling distinctive forms of knowledge, judgement, and accountability to enter lending processes. Third, it develops a practice-based interpretation of Polanyi's countermovement: finance can be redirected towards substantive social ends through ordinary organisational arrangements that challenge the dominance of liquidity and short-term returns. For practitioners, the findings suggest that ethical banking depends on designing procedures for critical engagement, meaningful member participation, and continuing borrower relationships, while recognising their costs and tensions. For policymakers, they raise questions about whether uniform prudential frameworks adequately recognise the diverse organisational models and relational commitments through which banks serve the real economy. The single-case qualitative design does not establish that these mechanisms are universally transferable; rather, it identifies processes and tensions that comparative research can examine across other financial institutions.

Keywords: Ethical banking; Value practices; Cooperative governance; Relational accountability; Financialisation

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Development of international standards on statistics of cooperatives and the social and solidarity economy

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Abstract

Background Statistics are not merely technical instruments for describing socio-economic realities. They also play an institutional role in shaping how these realities are understood, represented and addressed through public policies. Statistical definitions, classifications and measurement frameworks determine which economic actors and activities become visible and how their contributions are assessed. At the same time, statistical frameworks are social constructions reflecting prevailing perceptions, policy priorities and normative choices. The development of statistical standards can therefore be understood as a process of institutionalization involving stakeholders with diverse perspectives and interests.

This perspective is particularly relevant to cooperatives and the social and solidarity economy (SSE), whose distinctive characteristics and contributions remain insufficiently captured by existing statistical systems. Important international progress has nevertheless been achieved, notably through the adoption of the *Guidelines concerning statistics of cooperatives* by the 20th International Conference of Labour Statisticians (ICLS) in 2018 and subsequent resolutions concerning the SSE adopted by the International Labour Organization (ILO) and the United Nations. These developments have reinforced the need for internationally comparable statistics that adequately reflect cooperatives and the SSE.

Objectives. This panel examines ongoing international initiatives to develop statistical standards and methodological tools for measuring cooperatives and the SSE. It approaches these initiatives not only as technical exercises but also as collective processes through which the specific identities, characteristics and contributions of these economic forms are translated into internationally recognized statistical concepts.

The panel has three main objectives: to provide an overview of ongoing international initiatives coordinated by the ILO and its partners; to present emerging methodological proposals for measuring the economic contributions of cooperatives; and to introduce the conceptual framework being developed for SSE statistics. It also seeks to engage the broader research community in discussions on the conceptual and methodological choices involved in these initiatives, contributing to the consultation process ahead of the planned submission of relevant outputs to the 22nd ICLS in 2028.

Methods. The initiatives presented in this panel are being developed through a collaborative and iterative process combining methodological research, comparative analysis of existing statistical frameworks and national experiences, expert consultations and technical discussions.

Under the leadership of the ILO, two complementary technical working groups have been established. The Technical Working Group on Measuring the Economic Contributions of Cooperatives (TWG-MECC), operating within the framework of the Committee for the Promotion and Advancement of Cooperatives (COPAC), focuses on developing approaches to measure the economic contributions of cooperatives. The Technical Working Group on Statistics of the Social and Solidarity Economy (TWG-SSES), established within the United Nations Inter-Agency Task Force on Social and Solidarity Economy (UNTFSSE), focuses on developing an international conceptual framework for SSE statistics.

During 2025–2026, these working groups have conducted research and technical discussions involving international experts and relevant stakeholders. Their activities are complemented by ILO initiatives,

including the development of a Manual on Cooperative Statistics and related training materials, an online Community of Practice, and research projects addressing specific methodological challenges. The panel constitutes an additional stage in this participatory process by presenting emerging proposals and gathering feedback from the research community.

Results. The ongoing initiatives have advanced the identification of key conceptual and methodological challenges and the development of possible approaches to addressing them.

Regarding cooperative statistics, the work builds upon the 2018 ICLS Guidelines and explores how existing statistical measures can be complemented to better capture the specific economic contributions of cooperatives. It examines dimensions of economic contribution that may not be adequately reflected in conventional indicators of production, employment and value added, particularly those associated with the distinctive relationships between cooperatives, their members and other stakeholders.

Regarding SSE statistics, the technical work has progressed towards a conceptual framework intended to support the identification and measurement of SSE entities across different national contexts. Particular attention is given to translating the normative characteristics of the SSE into operational statistical criteria, defining the statistical perimeter and identifying relevant statistical units. The framework seeks to improve conceptual consistency and international comparability while accommodating diverse national institutional contexts.

Complementary activities have also contributed to strengthening knowledge exchange, statistical capacity and collaboration among statistical producers, researchers, policymakers and SSE stakeholders. These results remain provisional and subject to further technical discussions and consultations.

To present these initiatives, this panel session is composed of three presentations;

- Institutional and historical context of international standards on statistics of cooperatives and the SSE (Nawon Lee and Hyung sik Eum, ILO COOP/SSE)
- Conceptual framework for statistics on the SSE: Towards international guidelines (Marie J. Bouchard, UQAM and Chiara Carini, Euricse)
- Measuring the economic contributions of cooperatives (Olivier Frey, Lead author, COPAC Technical Working Group)

Discussion. The development of international statistical standards for cooperatives and the SSE raises questions extending beyond the selection of indicators and data collection techniques. A central challenge is how to translate their distinctive organizational characteristics, principles and economic relationships into operational statistical concepts without overlooking their diversity.

This requires balancing conceptual coherence with practical feasibility, international comparability with national institutional diversity, and existing statistical classifications with the need to recognize economic forms that are not adequately captured by conventional frameworks.

The two initiatives address complementary challenges. While cooperative statistics already benefit from internationally adopted Guidelines, further methodological development is needed to measure their specific economic contributions. For SSE statistics, a fundamental challenge is establishing a coherent and operational statistical framework across different legal and institutional contexts.

These challenges underline the importance of sustained dialogue among statistical experts, researchers, public institutions and cooperative and SSE stakeholders. Such dialogue is essential to ensure that international standards are technically robust, practically applicable and relevant to the realities they seek to represent.

Contributions and Implications. The panel contributes to debates on the statistical recognition and institutionalization of cooperatives and the SSE by connecting international statistical standard-setting with broader questions concerning the social construction of economic principles.

It highlights how statistical standards can improve the visibility and comparability of cooperatives and the SSE while also influencing how their identities and contributions are understood and recognized within official statistical systems.

From a practical perspective, these initiatives are expected to support national statistical offices and other institutions in improving statistical systems, identifying data gaps and producing more consistent evidence for policymaking. By sharing emerging proposals and inviting critical feedback, the panel also seeks to contribute to their refinement ahead of their planned consideration at the 22nd ICLS in 2028.

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Keywords: Statistics on cooperative, statistics on the SSE, ILO, COPAC, UNTFSSE

Conceptual framework for statistics on the social and solidarity economy towards international statistical guidelines

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Background. In recent years, the social and solidarity economy (SSE) has gained increasing recognition within international policy agendas as a key driver of inclusive and sustainable development. This recognition has been reinforced by the Resolution concerning decent work and the SSE adopted by the International Labour Conference (ILC) in 2022 (ILO, 2022) and by the United Nations General Assembly resolution on promoting the SSE for sustainable development in 2023 (UNGA, 2023). Both resolutions emphasise the need for improved statistical frameworks capable of measuring the contribution of the SSE to labour markets, economic development, social well-being and environmental sustainability.

However, most existing international statistical standards were developed prior to the adoption of the internationally endorsed definition of the SSE by the International Labour Organization (ILO) and the United Nations (see Bouchard & Salathé-Beaulieu, 2021). Consequently, current statistical frameworks only partially capture the scope and principles embedded in this definition. To remedy this situation, a roadmap towards guidelines concerning SSE statistics was adopted by International Conference of Labour Statisticians (ICLS) at its 21st meeting (ICLS, 2023).

Objectives. This paper presents the conceptual framework underpinning the development of an operational statistical approach to the SSE. The objective is to clarify how the principles articulated in the ILC definition of the SSE can be translated into operational statistical criteria that allow for the consistent identification of SSE entities across diverse institutional and national contexts.

The framework is being developed by the Technical Working Group on Social and Solidarity Economy Statistics (TWG-SSES), established under the United Nations Inter-Agency Task Force on Social and Solidarity Economy (UNTFSSE), with the aim of supporting the development of international statistical guidelines on the SSE.

Methods. The analysis combines conceptual analysis with an empirical review of existing statistical practices.

First, the paper analyses the conceptual foundations of the SSE as articulated in the ILC definition, with particular attention to key principles such as voluntary participation, democratic and/or participatory governance, autonomy and independence, and the primacy of people and social purpose over capital.

Second, it reviews existing international statistical standards and methodological frameworks relevant to the measurement of the SSE, including the System of National Accounts (European Commission et al., 2025), the ILO Guidelines for statistics concerning cooperatives (ILO, 2018), the United Nations Handbook on Non-Profit Institutions and Related Social Economy Institutions (UNSD, 2018), the CIRIEC Manual for Social Economy Satellite Accounts (CIRIEC, 2006), and relevant ILO resolutions, manuals and guidelines, such as those concerning cooperatives and volunteer work.

Third, the paper examines national experiences in producing SSE statistics across several countries and regions, analysing institutional arrangements, data sources and statistical methodologies.

Results. The paper develops a conceptual and operational framework for the statistical identification of SSE entities. It sets out a series of operational criteria applicable across different institutional sectors and legal forms, including cooperatives, mutuals, associations, foundations and other SSE entities listed in the ILC definition. Building on these criteria, the framework outlines a screening process to support the identification of SSE entities and proposes typological classifications aimed at capturing the organisational diversity of the SSE.

Discussion. The framework contributes to bridging the gap between the institutional definition of the SSE and the requirements of statistical measurement. It builds on existing statistical standards and examines how the principles embedded in the ILC definition of the SSE can be operationalised for statistical purposes across countries.

At the same time, the analysis highlights conceptual and methodological challenges, dealing with the diversity of organisational forms encompassed by the SSE, variations in national legal frameworks, and the need to account for both formal and informal entities.

Contributions and Implications. This paper contributes to ongoing international efforts to develop harmonised statistical guidelines for measuring the SSE. By clarifying the conceptual foundations of SSE statistics and proposing operational criteria for identifying SSE entities, it provides a solid analytical basis for this work. The framework outlined in this paper is intended to inform the development of the Guidelines concerning statistics on the SSE to be discussed at the 22nd ICLS in 2028.

Keywords: Statistics; Social and solidarity economy; Conceptual framework; International guidelines

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Measuring the Economic Contribution of Cooperatives

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Background. Reliable statistics are needed to understand the economic contribution of cooperatives and support comparisons across countries and enterprise types. The International Labour Organization (ILO, 2018) established a common framework for cooperative statistics, including employment, revenue, value

added, assets, liabilities, investment, earnings and the use of surplus. These measures remain essential, but they do not separately identify all economic mechanisms arising from the relationship between cooperatives and their members. Members participate as producers, workers, consumers or users, and may receive benefits through transaction conditions rather than distributions of accounting profit. Consequently, a cooperative's reported surplus alone cannot adequately describe how it transfers economic benefits to members or accumulates collective resources. This paper draws on the final report prepared for the COPAC Technical Working Group on Measuring the Economic Contribution of Cooperatives (Frey, 2026).

Objectives. The objective is to develop a coherent and feasible measurement framework that combines conventional economic indicators with complementary information on cooperative-specific mechanisms. The analysis clarifies pre-distribution, patronage refunds and indivisible reserves, and identifies the supporting information needed on transactions with members and non-members. It also distinguishes direct economic contribution from broader impacts and establishes priorities for progressive implementation. The framework seeks to improve statistical visibility while preserving comparability with other enterprises and consistency with established national accounting concepts.

Methods. The study adopts a conceptual and methodological approach based on documentary analysis of international statistical guidance, cooperative accounting and legal arrangements, and relevant research. It examines the ILO Guidelines and subsequent measurement guidance (ILO, 2018, 2022), alongside the System of National Accounts 2025 (United Nations et al., 2025). Economic mechanisms are examined in terms of their meaning, accounting visibility, potential data sources and measurement limitations. Indicator selection considers statistical relevance, conceptual validity, comparability, feasibility, availability of source information and reporting burden. The proposed indicators are then organized by their information requirements. Existing impact and sustainability frameworks inform the discussion of broader dimensions, without being adopted as a comprehensive enterprise-level impact assessment system. This work develops a proposal for statistical implementation and testing; it does not report a new survey, an empirical evaluation of the framework or causal estimates of cooperative effects.

Results. The principal result is a layered measurement framework. Its conventional core comprises employment and work, employee earnings and remuneration, revenue or turnover, output, gross value added, operating surplus, assets and liabilities, investment and enterprise demography. Where feasible, these indicators should be disaggregated by cooperative type, economic activity and geographical area. Derived ratios and sectoral shares can support interpretation without necessarily creating additional primary data requirements. Compilation of this core should proceed while more complex measures are developed.

The complementary layer distinguishes three mechanisms. Pre-distribution concerns benefits provided through member transaction conditions before net surplus is determined. Patronage refunds allocate benefits according to members' transactions or participation in cooperative activity; measurement should distinguish amounts distributed, retained on behalf of members and converted into member capital where possible. Indivisible reserves represent collective resources that cannot be distributed to individual members under the applicable arrangements. Their accumulated stock should be distinguished from annual allocations. Information on member and non-member transactions helps interpret these mechanisms, but its operational definition must reflect cooperative type: relevant transactions can involve purchases, sales, labour or financial services.

Three feasibility tiers organize implementation. Tier 1 covers information potentially obtainable from existing accounting, administrative or regulatory sources, including separately reported patronage refunds and indivisible reserves. Tier 2 covers information requiring supplementary reporting or collection, such as detailed surplus allocation or member/non-member transactions. Tier 3 covers indicators requiring estimation, principally pre-distribution. Tier placement depends on national reporting systems and does not rank conceptual importance. Administrative and regulatory records, financial statements, statistical business registers, enterprise surveys, economic censuses and cooperative-specific collections provide

complementary sources. Linking them can improve coverage and reduce reporting burden, provided definitions and statistical units are reconciled.

Discussion. Separate identification must not be confused with additional economic value. A cooperative-specific flow or stock may already be reflected in conventional accounts without being identifiable as a member-related mechanism. Adding these measures mechanically to gross value added would therefore be inappropriate. Pre-distribution is particularly demanding because its estimation requires an external benchmark or counterfactual for transaction conditions. Product quality, quantity, location, timing and other contractual characteristics affect comparability. Estimates should initially remain supplementary and experimental, with assumptions documented, rather than adjusting conventional aggregates. Patronage refunds and indivisible reserves are more directly observable, but differences in national legal and accounting arrangements still require common operational definitions and testing.

The report also identifies broader dimensions concerning production and market coordination, employment quality and worker protection, redistribution, territorial anchoring and environmental stewardship. Their statistical maturity varies. Descriptive indicators can document activities and outcomes, but do not establish that the cooperative form caused them. Effects on competition, resilience or communities require additional analytical methods and appropriate counterfactuals. The proposed framework therefore separates immediately usable measures from variables needing supplementary information and questions requiring further methodological research.

Contributions and Implications. The contribution is an operational connection between conventional economic measurement and the distinctive allocation of value within cooperatives. It provides a common direction for statistical development while allowing implementation to reflect national capacities and cooperative diversity. Statistical offices and cooperative organizations should first map existing sources, then test targeted additions to reporting, and subsequently pilot estimation methods for pre-distribution. National pilots should assess data quality, interpretability, comparability and respondent burden before wider adoption. Such testing can refine definitions and compilation guidance and inform the developing ILO Manual on Cooperative Statistics and preparatory work towards the 22nd International Conference of Labour Statisticians. The framework is a basis for that process, with its practical feasibility and comparative performance still to be established.

Keywords: Cooperative statistics; Economic contribution; Pre-distribution; Patronage refunds; Indivisible reserves

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Identifying SDG Reporting Profiles in Financial Cooperatives: A Global Cluster Analysis

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Abstract

Background

The adoption of the 2030 Agenda for Sustainable Development established a global framework comprising 17 Sustainable Development Goals (SDGs) and 169 targets aimed at eradicating poverty, reducing inequality, and protecting the planet. Within this framework, SDG 12 on "Responsible Consumption and Production"—and specifically target 12.6—encourages companies to implement sustainable practices and disclose sustainability information. Reporting on how organisations contribute to the SDGs represents an important step forward in corporate sustainability, as communicating engagement with the goals signals a strategic commitment to sustainable development (Sierra-García et al., 2022).

A growing body of research has examined the integration of the SDGs into corporate sustainability reporting and its determinants (e.g., Rosati and Faria, 2019a, 2019b; Martínez-Ferrero and Garcia-Meca, 2020). However, this literature focuses predominantly on publicly traded firms, paying less attention to alternative organisational forms, such as cooperatives, whose principles and activities are closely aligned with sustainable development. As key Social Economy organisations, cooperatives create significant social and economic value (Bouchard, 2009; Defourny et al., 2009; Chaves and Demoustier, 2015) and are recognised as important contributors to the SDGs through their promotion of democratic governance, social inclusion, income generation, and environmental stewardship (Mozas, 2019; Salathé-Beaulieu et al., 2019; Iryani, 2023).

Cooperatives contribute to a wide range of SDGs, including those related to poverty reduction, gender equality, education, health, food security, decent work, and sustainable resource management (Wanyama, 2014). These contributions are closely embedded in the seven Cooperative Principles, several of which have been directly linked to specific SDGs (Álvarez and Alarcón, 2019). Within the cooperative movement, financial cooperatives are particularly relevant to the 2030 Agenda given their economic and social role and their principles of solidarity, democratic governance, community proximity, and social commitment (Schwettmann, 2014; EACB, 2023).

Despite this potential, little is known about how financial cooperatives disclose and communicate their contributions to the SDGs. Although previous studies have examined cooperatives' contributions to the SDGs (e.g., Mozas, 2019; Iyer, 2020), research specifically addressing SDG reporting within financial cooperatives remains limited and fragmented. Existing evidence suggests that SDG reporting is still relatively underdeveloped in the cooperative sector, partly due to the lack of reporting frameworks and sector-specific guidelines (Duguid and Rixon, 2023).

Research on SDG reporting lacks a unified theoretical framework, with legitimacy, stakeholder, and institutional theories among the most frequently applied perspectives (Low et al., 2023; Awuah et al., 2024). These perspectives have been linked to specific SDGs, particularly SDGs 8 and 12 from legitimacy and stakeholder perspectives, and SDGs 8, 9, and 12 from an institutional perspective (Raman et al., 2023). These theoretical perspectives are particularly relevant to financial cooperatives, given their distinctive

governance and stakeholder orientation, and provide a useful lens for interpreting the extent and configuration of their SDG disclosure.

Aims

Against this background, examining SDG disclosure among financial cooperatives can provide insights into both the extent and configuration of their reporting and the extent to which these practices reflect their distinctive cooperative identity. Accordingly, this paper seeks to characterise SDG disclosure among the world's leading financial cooperatives by examining its extent and content and exploring whether distinct disclosure profiles emerge across organisations.

Methods

To this end, a mixed-methods approach is employed, combining content analysis of corporate reports with cluster analysis to identify distinct SDG reporting profiles. The analysis draws on data from 2020 to 2022 provided by the World Co-operative Monitor (ICA and Euricse, 2021, 2022, 2023), which reports information on the world's 300 largest cooperative and mutual organisations.

Results

The results show an increasing trend in SDG disclosure during the period analysed. SDG 13 (Climate Action) and SDG 8 (Decent Work and Economic Growth) emerge as the most frequently disclosed goals. However, the extent of SDG coverage varies substantially across cooperatives, suggesting heterogeneous reporting practices.

The cluster analysis identified four distinct profiles, supported by the elbow, silhouette, and gap statistic methods. Cluster 1 comprises minimal reporters, with almost no SDG disclosure; Cluster 2 represents comprehensive reporters, disclosing an average of 15 SDGs; Cluster 3 includes high reporters, with an average of 11.6 SDGs but specific thematic gaps; and Cluster 4 comprises moderate reporters, disclosing an average of five SDGs. These profiles indicate that SDG reporting differs not only in the number of goals disclosed but also in their specific configuration.

Despite the overall increase in disclosure, reporting profiles remained relatively stable at the cooperative level. Most cooperatives remained in the same cluster throughout 2020–2022 with only five changing their reporting profile. Most transitions involved movement towards more comprehensive reporting and were associated with the incorporation of specific SDGs, particularly SDGs 6, 11, 12, and 17. The association analysis further shows that cluster differentiation is driven primarily by a subset of SDGs with strong discriminating power. SDGs 8 and 17 exhibit the strongest associations with cluster membership, followed by SDGs 10, 1, 12, and 11. SDGs 5, 13, 15, and 9 also contribute substantially to cluster differentiation, whereas SDGs 2, 14, and 6 show weaker associations. Overall, the findings indicate that differences in cooperative reporting profiles are shaped not simply by the number of SDGs disclosed, but by the particular configuration of goals reported.

Discussion

Taken together, these differentiated reporting profiles can be interpreted as reflecting a combination of institutional expectations, legitimacy considerations, and responsiveness to different stakeholder groups, with the cooperative identity providing an important normative context.

The study is subject to limitations, particularly its focus on a relatively small group of large financial cooperatives and its reliance on publicly available information, which does not necessarily capture the depth or quality of SDG implementation. Nevertheless, the findings contribute to the limited literature on SDG reporting in financial cooperatives by showing that disclosure practices are not only differentiated in extent but also in the specific configuration of SDGs reported.

Keywords: Sustainable Development Goals (SDGs); SDG reporting; Agenda 2030; financial cooperatives

Theme(s): Environmental and Social Sustainability in Cooperatives; Cooperative Banks and Mutual Insurers

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Institutional Profiles Under a Common Prudential Framework: Evidence from Brazilian Credit Cooperatives and Banks

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Abstract

Background

Prudential regulation has converged on the Basel template, and national supervisors apply it in proportion to size, complexity and business model. Brazil sorts authorised institutions into five segments (Conselho Monetário Nacional, 2017). Segments 1 to 4 apply the full methodology, while small institutions may opt for a simplified method of computing minimum capital. A credit cooperative that grows past the threshold, or declines the simplified option, therefore computes capital, risk weights and provisions under the same rules as a commercial bank. International surveys of proportionality record no criterion based on organisational form (Basel Committee on Banking Supervision, 2019), and where supervisors adapt the framework to financial cooperatives the adaptation concerns member shares and network arrangements (Coelho et al., 2019). Cooperative capital is an endowment of retained earnings accumulated across member generations (Fonteyne, 2007), and the member's claim is a claim on the use of the institution. The cross-country evidence finds cooperative banks more stable, less profitable and less capitalised than commercial banks (Hesse & Čihák, 2007; McKillop et al., 2020). None of this evidence compares the two forms under a common prudential methodology, and comparison groups defined by legal category can include institutions with little economic resemblance to a bank.

Aims

The paper asks two questions. First, whether organisational form leaves a measurable imprint on capital, performance, stability and balance-sheet structure once the prudential methodology is common to both forms. Second, how far the answer depends on choices the analyst makes: which institutions form the comparison group, how cumulative accounting flows are converted into rates, and how a matched estimator is weighted.

Methods

We build an institution-quarter panel from IF.data, the public repository of the Central Bank of Brazil, covering the cooperatives and banks under the full methodology from the first quarter of 2017 to the last quarter of 2024: 130 singular credit cooperatives and 144 banks, 7,234 institution-quarters. Institutions are classified on the regulator's consolidation type, which makes cooperative status time-invariant, and central cooperatives are excluded as wholesale entities. Nine quarterly outcomes cover the Basel capital ratio, leverage, return on assets after and before tax, the intermediation margin, cost-to-income, credit intensity, the provisioning ratio and the funding ratio. Two stability outcomes, return volatility and the z-score, are measured at the institution level. Two features of the source data are corrected: income fields accumulate within the semester and are de-cumulated and annualised, and the intermediation result is reported net of loan-loss provisions and is computed gross. Each outcome is related to a cooperative dummy under four specifications: the unconditional difference, controls for log assets and quarter, coarsened exact matching on size with the weighted estimand reported, and the region of common support. The comparison side is a reported parameter with five rungs: all non-cooperatives, banks, banks within macro-region, commercial banks and deposit-funded banks. Standard errors are clustered by institution and confirmed by a restricted

wild cluster bootstrap (Cameron et al., 2008; MacKinnon & Webb, 2017). Conditional medians and quantile regressions are reported beside the conditional means, and an explicit rule classifies each outcome as null, stable or stable in sign.

Results

Three results emerge. First, at comparable size cooperatives allocate nearly a fifth more of total assets to credit than banks nationally, operate at lower cost at the median, and show lower return volatility and a higher z-score. Before tax the typical cooperative earns more than a comparable bank. The conditional median differential is 1.4 percentage points and excludes zero; the mean gap is significant in only two of four specifications, pulled towards zero by a high-earning bank upper tail, and is therefore null by the rule. After tax cooperatives retain about two percentage points more, a stable result. The pre-tax gap under controls is three fifths of the after-tax one, so the tax exemption of cooperative acts accounts for about two fifths. The other differentials hold on every national definition of a bank. Credit intensity cannot be told apart from zero within macro-region, where the estimates are imprecise. Second, capital differs modestly in level and markedly in dispersion. The size-controlled mean gap is large and negative, yet the conditional mean is about seven times the conditional median, and the quantile coefficient is positive at the bottom of the capital distribution and negative at the top, crossing zero near the fortieth percentile. The mean gap comes largely from a bank upper tail. Fourteen percent of bank-quarters exceed a Basel ratio of 50 percent, against one percent of cooperative-quarters, and the tail sits among small standalone banks that barely intermediate. Restricting the comparison to deposit-funded banks roughly halves the gap, and the residual standard deviation of the capital ratio among cooperatives is about a third of the bank figure. Third, two differences often reported disappear once the comparison group is restricted to banks. Against all non-cooperatives, cooperatives appear to provision less and to earn narrower margins; against banks both coefficients are close to zero. The broad-group provisioning gap comes from non-banking lenders whose provisioning ratios are nearly three times those of banks and cooperatives. At the conditional median cooperatives provision more, and no tercile of the capital distribution shows them provisioning less. Every surviving result keeps its sign under four winsorisation rules, without the largest banks, before and after the 2022 revision of the capital rules, and under weighted and unweighted matching. Selection into the full methodology bears on generalisation: the estimates describe the adopters, and the wider cooperative population would, if anything, show larger credit and profitability differentials.

Discussion

The surviving results describe a focused retail lender that channels a high share of its assets into member credit, runs that operation at low cost, earns a somewhat higher operating return than banks at the median, retains more of it after tax and sits in a narrow band of the capital distribution. The results agree with Hesse and Čihák (2007) on lower capitalisation and lower return volatility and differ on profitability; the fiscal treatment of cooperative acts accounts for about two fifths of the after-tax difference, and the pre-tax mean gap is not established, so the disagreement is narrower than the after-tax figures suggest. At the thin end of the capital distribution, where supervisory concern attaches, cooperatives hold more capital than comparable banks and provision no less. Several differentials that look large at the mean are differentials in dispersion. Three analyst choices determined whether headline results existed: the comparison group, the reading of cumulative income fields as quarterly flows, and unweighted estimation on the matched sample. The estimates are conditional correlations on the largest cooperatives in the country, the provisioning ratio is an accounting variable, and the network backstop hypothesis needs consolidated data that IF.data does not carry.

Contributions and Implications

The paper offers the first profile of cooperative behaviour under full Basel-style regulation in a large emerging market, on the full population of cooperatives and banks under the full methodology, together with two nulls that correct claims the same data appear to support under a looser comparison group. Methodologically, it sets out a protocol that defines peers on the regulator's own categories, reports a

ladder of comparison groups, separates sector-wide from within-market differences and reports the matched estimand. For proportionality, the results raise two margins beyond size: the treatment of integrated networks and their backstops, and the calibration of a benchmark against an average institution whose upper region cooperatives do not inhabit. A lighter requirement does not follow automatically, since the systemic externality and the guarantee still apply. For the cooperative movement, a case resting on cost and return stability holds against every definition of a bank we tried, and one resting on profitability holds for the retained return and, for the operating return, at the median rather than at the mean. A case resting on more conservative provisioning does not.

Keywords: credit cooperatives; prudential regulation; Basel; proportionality; Brazil

Theme(s): Public Policy and Institutional Support for Cooperatives; Cooperative Banks and Mutual Insurers

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Employee participation and job satisfaction in co-operative financial institutions: the role of job tenure and organisation size

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Abstract

Background

Although co-operative financial institutions (CFIs) are, by their very nature, democratic organisations pursuing dual economic and social goals (Camargo Benavides & Ehrenhard, 2021; Piasecki & Ławrynowicz, 2025), contemporary market and regulatory challenges are prompting them to redefine their strategies to place greater emphasis on efficiency, scaling up their operations and specialisation (Kil & Miklaszewska, 2017; Stoop et al., 2021). These processes influence employee relations and highlight the need to take a closer look at employee well-being and long-term human resource management (HRM). One of the key HRM areas that has been little studied in CFIs to date is employee participation (Piasecki & Ławrynowicz, 2025). This is surprising, as employee participation can be viewed as one of the elements that shape the 'co-operative difference' (Novkovic, 2022) and has a significant impact on job satisfaction (Piasecki, 2025).

Aims

This article aims to explore the role of employee participation in shaping job satisfaction within CFIs. To better understand the relationships between these variables, we consider job tenure as an important factor influencing the attitudes of co-operative employees (Cicognani et al., 2012), and organisation size as a key contextual element connected with the character of employee relations within co-operatives (Novkovic, 2022; Stoop et al., 2021).

Methods

Drawing on social exchange theory (e.g. Cropanzano & Mitchell, 2005), we formulate several hypotheses concerning the direct effect of employee participation on job satisfaction, as well as its interaction with tenure and company size. We test these hypotheses using two-level linear regressions on data from 511 employees of 15 Polish cooperative banks.

Results

Consistent with our predictions, employee participation is associated with greater job satisfaction, and this effect is stronger for large CFIs. The two-way interaction between employee participation and tenure was found to be statistically insignificant, although some differences were identified between more and less experienced employees. Finally, an analysis of the three-way interaction between employee participation, tenure and organisation size indicated that, for employees with longer tenure, the effect of participation is stronger among those employed in large CFIs than in small ones.

Discussion

These results show that employee participation is a key element of HRM, particularly in large CFIs, which may face greater challenges in maintaining their co-operative identity (Kil & Miklaszewska, 2017; Piasecki et al., 2026). The analysis also confirms that building relationships with employees is a long-term process (Simintiras et al., 2012), and the benefits of involving them in decision-making are more evident among those with greater tenure.

Contributions and Implications

Our study contributes to the literature on HRM in CFIs by exploring the under-researched topic of employee participation. This issue is particularly important given the growing concerns about the erosion of the co-operative identity within these organisations (Akinsoyinu, 2017; Kil & Miklaszewska, 2017; Stoop et al., 2021). Furthermore, we contribute to the co-operative literature by demonstrating how contextual factors (organisation size) influence employee relations. In this way, we help to bridge the gap associated with the limited number of studies on employee issues in co-operatives that take contextual factors into account (Basterretxea & Storey, 2018; Mohd Fuzi & Baki, 2025). Additionally, the findings provide management of CFIs with guidance on shaping HRM by identifying factors that influence the positive outcomes of employee participation.

Keywords: employee participation; job satisfaction; co-operative financial institutions; social exchange theory

Theme(s): Cooperative Governance and Management; Cooperative Banks and Mutual Insurers

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Fidelity of credit union members: evidence from Brazil

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Abstract

Background

In credit unions, member fidelity is crucial for competing with traditional banks and fostering growth. Here, fidelity is defined as the extent to which the credit union participates in a member's financial activities, thereby demonstrating the member's commitment through mutuality (Móglia et al., 2004).

Several factors can influence customer fidelity, extending beyond financial advantages like better rates and payment terms (Sparemberger et al., 2023). These include awareness of the importance of cooperation (Móglia et al., 2004), alignment with the cooperative's values (Zeithaml et al., 1993), convenience such as proximity and quality of service (Fiorin & Morais, 2018), personalisation (Kalpadakis & Spais, 2015), recognition and appreciation, social and educational consciousness (Fiorin & Morais, 2018), member participation and engagement, transparency and trust in the brand (AlHares et al., 2023), satisfaction with the products and services provided (Amuruth Raj, 2013), distribution of surpluses, and even opportunism (Serigati & Azevedo, 2013).

Aims and Methods

The aim of this study was to identify the key factors and determinants of member fidelity in credit unions. Methodologically, this is an applied, descriptive study employing a mixed-methods approach. The fidelity factors and elements discussed in the literature were identified through a systematic review. These indicators were assessed by nine credit union specialists, including commercial directors and branch managers. The assessment was conducted through semi-structured interviews, followed by content analysis. The resulting set of factors and elements was validated with members via a survey. A total of 200 valid responses were collected, and the data were analysed using exploratory factor analysis.

Results

As the main results, twenty-one fidelity factors were identified, organised into four categories: trust, cooperative education, product and service quality, and customer relationships. Of these, the following stand out: trust, responsiveness and access to credit at fair rates, quality of service, close customer relationships, products and services, transparency, credibility, and the performance of skilled and approachable managers.

The study also revealed that perceptions of how they differ from traditional banks are still weak, and most members lack a clear understanding of the principles of cooperativism, as well as their rights and responsibilities as members.

Although cooperative members recognise the positive qualities of cooperatives, there are still gaps in their perception of added value, which makes it difficult to clearly distinguish them from traditional banks. Many members do not see evident tangible benefits that justify centralising their banking transactions within the cooperative. This can be attributed both to a lack of effective communication and to an absence of strategies that reinforce the advantages of fidelity, such as bonuses, cashback, tiered discounts, or even recognition of the most active members — elements that are already widely adopted by private banks.

The results also showed that credit terms—including interest rates, repayment periods, credit limits, and the speed of approval—are key factors influencing members' choice of primary financial institution. Attractive credit options, such as special credit lines and simplified processes, greatly impact this decision.

This situation presents cooperatives with a strategic dilemma: how to offer competitive credit while upholding cooperative principles, especially regarding financial sustainability and democratic governance?

Internally, staff performance is recognised as a key factor in building trust. The relationship with managers, along with their availability and competence, strengthens members' positive perceptions. However, this relational advantage must be consistently nurtured through training, strategic alignment, and immersing staff in the principles of cooperation.

Discussion

In summary, the study indicates that customer fidelity extends beyond immediate financial gains — it relates to building relationships, a sense of belonging, and a clear sense of purpose. To effectively set themselves apart within the financial sector, cooperatives must strengthen their position as democratic, solidarity-based organisations committed to the common good.

Contributions and Implications

As contributions and implications, we can infer that many members view the cooperative merely as another financial institution, emphasising the need for strategic repositioning. Educational marketing initiatives centred on the cooperative's identity, values, and value proposition are vital. Member fidelity now depends not only on product competitiveness but also on fostering a sense of purpose and belonging among members.

For members to centre their financial lives around cooperatives, it is not enough to offer good products; it is essential to provide meaning, purpose, and a sense of belonging. Fidelity extends beyond interest rates or credit limits; it relies on a collective, transparent project that enables members to see themselves reflected in the cooperative process.

Keywords: Fidelity; credit unions; cooperativism

Theme(s): Cooperative Banks and Mutual Insurers

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6. Education, Youth, Gender and Inclusiveness

Research streams: Education and Training about / for Cooperatives · Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

10 contributions

Values, Knowledge and Cooperative Professional Orientation: A Study Among University Students

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Abstract

Background

Employability has become a central mission of universities, and the matching of graduates with employers increasingly depends not only on person–job fit but also on person–organization (P-O) fit, that is, the compatibility between individual values and those of the organization (Kristof, 1996; Kristof-Brown et al., 2005). Research on this fit has rarely considered the institutional form of the employer beyond the public–private divide, even though cooperatives, the core business model of the social economy, rest on a distinctive identity of values (self-help, democracy, equality, solidarity, honesty, social responsibility) and governance rules (ICA, 2023). Several authors expect this identity to attract individuals whose values are compatible with it (Besley and Ghatak, 2017), yet empirical evidence is scarce. Previous work with business students in Quebec, the Canadian province with the highest cooperative penetration, showed that knowledge of the cooperative model is the decisive factor in cooperative job preference (Buendía-Martínez et al., 2020). It also showed that students oriented towards cooperatives share symbolic values consistent with the cooperative identity, and that specific training shifts the orientation of most students who had no prior preference (Buendía-Martínez et al., 2025). Following the person–environment approach to career choice (Blau, 1956; Leung, 2008), those studies also pointed to the societal context as a possible driver of preferences. However, their multinomial and cluster-based designs described profiles rather than testing the joint and relative weight of each driver.

Aims

This paper aims to estimate how societal context, personal values and work values jointly explain the preference for working in a cooperative, and to test whether the congruence between students' own values and the values they attribute to cooperatives, together with gender and occupation, shapes that preference. The underlying question is whether cooperative job preference is rooted in a P-O fit of values or in what students seek from a job.

Methods

Data comes from a survey of 316 undergraduate business administration students in Quebec. Respondents chose three of ten options for each block: global problems, empowerment factors, technology trends, personal values, work values and values associated with cooperatives. Because almost every student lacking knowledge of cooperatives expressed no preference, the analysis focuses on the 178 who know the model, with a binary dependent variable. We estimate a partial least squares structural equation model (PLS-SEM) with formative composites (Hair et al., 2022). Societal context is specified as a formative–formative higher-order construct with three dimensions and estimated in two stages (Becker et al., 2012). The forced-choice format makes the items ipsative, so one reference category per block is omitted and weights are read relative to it. Personal values are grouped following Schwartz (1992) into self-transcendence (reference), conservation and self-enhancement; work values are grouped into extrinsic (reference), development/autonomy and social/participative. Value congruence counts how many of a student's personal values they also attribute to cooperatives (0–3). Inference combines bootstrapping (5,000 resamples), a permutation test of the structural paths (2,000 permutations), which guards against the upward bias of formative composites in small samples, and out-of-sample assessment with PLSpredict

(Shmueli et al., 2019). Moderation by gender, occupation and congruence is tested through interaction terms. A logistic regression with cross-fitted construct scores serves as a robustness check.

Results

All formative indicators show acceptable collinearity (VIF ≤ 2.68), and the three dimensions of societal context carry significant second-order weights (0.53–0.63). The model explains 25% of the variance in cooperative preference, well above the 6% obtained under random permutation, and shows predictive relevance (Q^2predict = 0.16; cross-validated AUC = 0.79). Personal values are the strongest driver (β = 0.33, p < 0.001). Compared with self-transcendence, self-enhancement values such as personal power and social success sharply reduce the propensity towards cooperatives (weight = −0.95), and so, to a lesser extent, conservation values (−0.44). Value congruence has a direct positive effect (β = 0.21, p = 0.004): each additional coincidence roughly doubles the odds of preferring a cooperative. The effect of societal context (β = 0.23) does not exceed what chance produces in the permutation test (p = 0.14), although concern with political and security problems and with automation technologies leans towards cooperatives. Work values, despite a well-defined social and participative component, have no effect once personal values are considered (β = 0.04). Neither gender nor occupation moderates any relationship. A saturated specification with all 44 original items fits the sample better (R^2 = 0.36) but predicts worse (Q^2predict = 0.09), since 0.21 of its R^2 arises by chance.

Discussion

The results support the view that cooperative job preference rests on a P-O fit of basic values rather than on job attributes. The decisive divide follows Schwartz's opposition between self-transcendence and self-enhancement, mirroring the ethical values of the cooperative identity. Value congruence, which operationalizes P-O fit directly, adds explanatory power beyond students' own values. Because congruence can only arise when students recognize what cooperatives stand for, the finding reinforces the earlier conclusion that knowledge is a precondition for the fit. It also refines that conclusion: knowledge makes the choice possible, whereas values determine its direction. The weak role of work values qualifies bivariate evidence that associated impact on society and participation with cooperative orientation, since those attributes seem to express deeper personal values. The limited effect of the societal context suggests that concerns about the world matter less than who students are, although the forced-choice measurement may understate it.

Contributions and Implications

The paper makes three contributions. Theoretically, it offers the first structural test of P-O fit in cooperative job preference, separating the role of personal values, work values, value congruence and context. Methodologically, it shows how forced-choice survey items can be modelled as formative composites and why permutation and predictive assessment are needed to avoid overstating effects in small samples. Practically, it indicates that universities, cooperative organizations and policymakers should make the cooperative model known through its values, not only its employment conditions, and target students whose self-transcendent values already fit it. Limitations include the single-institution sample, the small number of non-cooperative respondents and the cross-sectional design.

Keywords: Person–organization fit; cooperative job preference; personal values

Theme(s): Education and Training about / for Cooperatives; Public Policy and Institutional Support for Cooperatives

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Are Cooperatives a Buffer against Labour Precariousness? A Gender Perspective

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Abstract

Background

Labour market precariousness remains a major challenge in Spain, particularly from a gender perspective. Although cooperative enterprises are founded on principles of democracy, equality and decent work, empirical evidence on whether these organisational models effectively reduce employment precariousness and gender inequalities remains limited. Existing studies have largely focused on isolated dimensions of job quality, such as contract type or wages, overlooking the multidimensional nature of precarious employment and the role of workers' labour trajectories. Against this backdrop, cooperatives provide a valuable setting for assessing whether alternative business models translate into more stable, inclusive and equitable employment outcomes.

Aims

This study investigates employment quality in Spanish cooperative enterprises from a gender perspective. Its main objective is to measure the incidence of labour precariousness among cooperative employees and to identify the individual, employment-related and firm-level factors that explain gender differences in precariousness.

Methods

The analysis draws on administrative microdata from the Continuous Sample of Working Histories (MCVL, 2023), which enables the identification of cooperative enterprises and the reconstruction of detailed employment trajectories. Using binary logistic regression models, the study estimates the probability of experiencing precarious employment as a function of workers' socio-demographic characteristics, job attributes, firm characteristics and labour market histories. Separate models are estimated for women and men in order to identify gender-specific drivers of precariousness. Results are presented through marginal effects to facilitate interpretation.

Results

The findings reveal that employment precariousness is generally lower in cooperative enterprises than in the Spanish labour market as a whole. Nevertheless, gender disparities persist. Women face a higher likelihood of experiencing precarious employment, largely associated with employment interruptions, part-time work and less continuous career paths. At the same time, both the overall incidence of precariousness and the magnitude of gender gaps appear more moderate in cooperatives than in conventional firms.

Discussion

These results suggest that cooperative enterprises contribute positively to employment quality and labour market inclusion, but do not fully overcome the structural factors underlying gender inequalities. Employment trajectories and broader labour market dynamics continue to shape precariousness outcomes, even within organisations committed to democratic governance and equality. By providing novel evidence based on administrative microdata at the national level, this study contributes to the literature on decent

work, gender equality and the Social Economy, while offering valuable insights for policymakers and cooperative organisations seeking to promote more equitable and sustainable employment.

Keywords: Cooperatives; Labour precariousness; Gender; Multidimensional indicators; Continuous Sample of Working Histories (MCVL); Spain

Theme(s): Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

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The Use of Artificial Intelligence and Active Methodologies in Cooperative Management Education: An Experience Report in Distance Learning

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Abstract

Background

Higher education in Cooperative Management faces the constant challenge of balancing doctrinal depth with the executive agility required by the market. In the Distance Learning (DL) scenario, this complexity is heightened by the need to break the student's perception of isolation and promote a real connection between the foundations of cooperativism and the daily crises of organizations.

In this context, Faculdade Unimed (Minas Gerais, Brazil), acting as an educational arm focused on innovation and ESG practices for the sustainable development of the Unimed System, implemented pedagogical strategies that integrate Artificial Intelligence (AI) and Active Methodologies. The central premise is that fluency in emerging technologies should not be seen merely as a technical competency, but as a sustainability requirement for cooperatives to maintain competitiveness without losing their human essence.

The intervention reported here involved an expressive group of 145 students from the undergraduate program in Cooperative Management. The goal was to provide an environment where the student assumed the role of protagonist of their own learning, using Generative AI not as a passive automation tool, but as a critical interlocutor for resolving complex managerial dilemmas.

Based on the logic of Bacich and Moran (2018), the experience sought to develop what is termed "algorithmic literacy": the ability to interrogate the machine under the filter of doctrinal values. Thus, the use of role-playing prompts allowed academics to confront technological modernity with the ethical rigor of the Rochdale founding principles, validating the premise that cooperative practice must be experienced to be fully understood, even in virtual environments.

Methods

The pedagogical intervention was structured under the aegis of active methodologies, aiming to position the student as the protagonist in the knowledge construction process. The target audience consisted of 145 students from the Cooperative Management DL undergraduate program. The activity was designed to occur in a cycle of two synchronous classes, mediated by digital technologies and continuous faculty support.

Stage 1: Preparation and Doctrinal Research

In the initial class, students were introduced to the proposal and oriented to work in groups. As a starting point, all received a real-life case study detailing a liquidity and governance crisis in a cooperative. From this critical scenario, students were challenged to choose one of the Rochdale Pioneers to conduct a fictional interview, asking this pioneer for advice on solving the problem. To ensure the scientific basis of the activity, students conducted prior research on the life, work, and historical context of the chosen personality, establishing the necessary framework to validate subsequent interactions with technology.

Stage 2: Technological Intervention and the Role-Playing Prompt

The technological experimentation phase required students to use at least two different Generative AI tools (such as ChatGPT, Gemini, or Copilot) for comparative analysis. The interaction was guided by a

meticulously structured role-playing prompt so that the AI would assume the persona of the chosen historical figure: "Hello! For an academic assignment, I would like to conduct a fictional interview. I ask you to assume the persona of [Full Name of the Personality]... respond to my questions as if you were [him/her], using the knowledge, opinions, and communication style that would be characteristic of them...". In this stage, the focus was on algorithmic literacy. Students formulated creative questions aimed at solving contemporary management problems, confronting the machine-generated answers with historical facts and current Brazilian legislation.

These commands instructed the AI to adopt the mindset of the Rochdale Pioneers, allowing students to question how the 5th and 7th cooperative principles could mitigate the crisis. As Schneider (2012) points out, cooperative education is the foundation of the model's identity, and the use of technology served to simulate this doctrinal application.

Stage 3: Socialization and Mediated Debate

The process culminated in sharing results on a digital curation platform (Padlet), where each group posted an interview summary and a critical evaluation of the veracity and quality of the AI's responses. To optimize dynamics and ensure the effective participation of all 145 students, the second class was organized into four simultaneous virtual rooms, containing approximately six groups each. In each room, two professors acted as mediators, instigating debate on the impressions gathered and connecting the students' statements to the fundamental concepts of cooperative management and technological ethics.

Results and Discussion

The analysis of data collected through Padlet and the debates in the synchronous rooms revealed a landscape of high pedagogical density. Among the most requested personalities for interviews, the following stood out, in order of preference: Charles Howarth, William Cooper, Miles Ashworth, James Smithies, and Ann Tweedale.

The majority choice for Howarth and Cooper highlights the students' interest in understanding the genesis of cooperative norms and administration directly from their intellectual formulators.

The atmosphere observed in the four debate rooms was one of intense participation, breaking the isolation barrier common to the DL modality. The results demonstrated a significant increase in engagement and cooperation among the 145 students. The activity confirmed Pinho's (2011) premise that cooperative practice must be experienced to be understood, even in virtual environments.

A highlight of the discussion was the analytical capacity shown when confronting AI tools. Students identified specific errors in the AI responses by comparing the tools' outputs with Brazilian legislation and their historical research. However, despite technological limitations, there was unanimity in describing the activity as dynamic and providing deep theoretical insight. Immediate application of concepts was observed in the cooperatives where the students already work, positioning AI as decision support rather than a substitute for ethical and human judgment.

As discussed by Bacich and Moran (2018), technology was kept at the service of pedagogy, acting as a catalyst for reflection that allowed the leader to confront executive modernity with the ethical rigor of the Rochdale principles.

Final Considerations

The reported experience demonstrates that the integration of Artificial Intelligence into Cooperative Education, when mediated by active methodologies, transcends simple technical mastery. Learning to formulate prompts that respect cooperative identity ensures that technological innovation serves the collective purpose and does not become an end in itself.

This work contributes to the field of education by validating a replicable and scalable pedagogical model of technological integration in DL. Beyond teaching tools, the activity promoted "algorithmic literacy,"

essential for forming leaders capable of managing the dual nature inherent to the cooperative model: the search for operational efficiency combined with social purpose.

Ultimately, the implications of this report suggest that the ethical mastery of AI is a sustainability requirement. For cooperatives to maintain competitiveness in the global market without losing their human essence, it is imperative that innovation is anchored in the values of mutual aid and permanent education.

Keywords: Cooperative Education; Cooperative Management; Active Methodologies; Artificial Intelligence; Distance Learning

Theme(s): Education and Training about / for Cooperatives

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Do Cooperative Principles Close Gender Wage Gap? Evidence From Spain

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Abstract

Background

The gender wage gap has been widely analysed from different theoretical perspectives, such as Becker's human capital theory (1962) and labour segregation (Acker, 2006). However, its existence is not only explained by individual factors, but also by structural and organizational dynamics. In this context, the social economy, and cooperatives in particular, stand out for their potential to mitigate these inequalities through their guiding principles.

Their social purpose places well-being and equality at the core of organizational strategy, fostering a commitment to equal opportunities between men and women, as well as to the creation of stable and high-quality employment. The literature highlights that women tend to show a stronger affinity for the values that characterize these organizations (Costantini & Sebillo, 2022), which encourages their participation in this sector (Hillenkamp & Dos Santos, 2019).

The principle of democratic governance reduces power asymmetries and facilitates women's access to decision-making positions. This greater presence of women on boards within the social economy (OECD, 2023) contributes to narrowing the gender wage gap (Arando & Lekuona, 2025). Additionally, the primacy of people over capital translates into more compressed wage structures (Castro Núñez et al., 2025) and greater work–life balance opportunities. This aspect may be particularly relevant for women of reproductive age and in rural contexts, where wage penalties may be more pronounced. Adi

Overall, cooperatives constitute an organizational environment with the potential to reduce the gender wage gap, although this depends on their capacity to consolidate more egalitarian models in the face of conventional labour market dynamics.

Aims

The aim of this study is to analyse the contribution of cooperatives to reducing wage gaps between men and women, providing evidence on the effective implementation of cooperative guiding principles.

Methods

This study draws on the 2024 edition of Spain's Continuous Sample of Working Histories (CSWH), using 2023 data. The CSWH allows direct identification of cooperatives through the entity code prefix "F". A control group of equivalent corporations is constructed, matched by firm size and economic sector.

To isolate the effect of entity type on wages, and thereby focus on employer-driven job quality, the analysis is restricted to a subsample of full-time workers who remained continuously employed throughout 2023. This reduces the influence of supply-side factors and centers the analysis on employer-driven job quality. Thus, while the gender wage gap is examined without adjusting for personal characteristics, it is controlled for firm size and economic sector.

Comparative analysis is used to identify differential wage patterns between groups. Statistical significance tests are conducted to estimate gender gaps, with a significance threshold of 5%. The final subsample comprises 4,173 cooperative employees and a weighted control group. Due to CSWH limitations, the Basque Country and Navarre are excluded, and the analysis focuses on employees.

Results

The analysis reveals differences between cooperatives and other firms in terms of wage structure and gender gaps. Although average wages are higher in other firms, wage dispersion is also greater: percentile ratios indicate lower inequality in cooperatives (p90/p10: 2.9 vs. 3.6; p90/p50: 1.9 vs. 2.3), with smaller differences in the lower part of the distribution (p50/p10).

Overall, gender wage gaps are lower on average in cooperatives (10.56% vs. 12.42%). A more detailed analysis by percentiles and individual and job characteristics identifies some situations in which gaps in cooperatives are larger than in other corporate forms. In most percentiles, except for the central ones, the gap is smaller in cooperatives. Likewise, the gap is lower in cooperatives across all age groups, tenure levels, temporary and permanent contracts, high and low skill levels, and in urban areas. However, larger gaps are observed in seasonal permanent contracts, medium skill levels, and rural areas.

For the 30–45 age group, associated with the reproductive stage, the gap is also generally lower in cooperatives. It is particularly noteworthy that it is nearly zero for permanent contracts (0.3%) and negative for tenures exceeding 10 years (−0.5%). Nevertheless, larger gaps persist in cooperatives among temporary contracts, medium and low educational levels, and medium and low skill levels. Overall, cooperatives exhibit more egalitarian wage structures and, in general, smaller gender gaps, albeit with some heterogeneity.

Discussion

While greater wage equality is observed within cooperatives, they also remain permeable to broader social dynamics that continue to produce gender wage gaps. In this regard, it is important to implement job evaluation systems and pay transparency measures to reduce disparities. Additionally, strengthening career development plans and internal promotion policies with a gender perspective would help consolidate career trajectories and further reduce wage gaps.

Contributions and Implications

This study contributes to a better understanding of the dynamics underlying gender wage gaps. By focusing on a specific group, those who have worked full-time throughout the entire year, it sheds light on the situation of individuals with more stable career paths. As such, it provides a useful framework for designing actions and policies aimed at reducing wage gaps within firms, particularly in terms of career development, promotion, and other measures with medium and long-term impact.

Keywords: Cooperatives; wage gap; workers owned firms; women; gender

Theme(s): Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

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Gender Equality and Governance in Cooperatives: Evidence from Rural Europe and the GRASS CEILING Project

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Abstract

Background. Cooperatives are democratic, member-based organisations whose principles of participation, equality, solidarity and concern for the community make them important potential drivers of inclusive rural development. In agricultural areas, they can help members share knowledge, obtain training and technical advice, reach markets and build networks that would be difficult to access individually. Yet these formal commitments do not guarantee equal influence in practice. Women in rural Europe continue to face unequal access to land, finance, professional networks and recognition, and remain underrepresented in positions of responsibility. Evidence from the Spanish Living Lab of the GRASS CEILING project helps explain how these inequalities take shape. In declining rural territories in northern Spain, women and men shared a strong commitment to product, production and technological innovation, while women also pursued a broader range of diversification and social or relational activities. At the same time, women more often described having to establish their competence before others recognised them as legitimate decision-makers (Rico et al., 2026). These findings invite closer attention to how cooperative membership and governance can translate women's contributions into voice and authority.

Objectives. This paper examines how cooperatives can support rural women's innovation and socio-economic inclusion, and how their governance can either widen or restrict women's participation in decision-making. It connects evidence on gendered agrarian innovation with debates on cooperative democracy to identify the gap between formal equality and effective influence. It also considers whether gender quotas, alongside other institutional reforms, can strengthen women's representation and substantive participation in cooperative leadership.

Methods. The study brings together project-level learning from the European GRASS CEILING project, which used Living Labs in nine countries, a qualitative analysis of its Spanish Living Lab, and a review of European rural-development and cooperative-governance frameworks. The Spanish research adopted a comparative, participatory approach with twenty-three participants: eight women agrarian innovators, five men working in comparable farming or livestock contexts, and ten institutional, sectoral and academic stakeholders. The material included questionnaires, individual interviews, gender-differentiated focus groups and a joint stakeholder focus group. A thematic analysis examined similarities and differences in innovation orientations and explored motivations, support networks, legitimacy and structural constraints. The analysis considers cooperatives as part of the institutional and relational environment for rural innovation; it does not directly measure the gender composition of cooperative boards. The small, purposively selected sample offers contextual insight rather than statistical representativeness.

Results. The evidence points to a two-sided role for cooperatives. Collective organisation can make knowledge, training, advice, market access and peer learning available to rural producers, thereby supporting innovation and reducing the isolation of small or remote holdings. These resources are particularly relevant where women have less access to finance, professional networks and institutional recognition. In the Spanish Living Lab, women and men drew on overlapping networks, including family members, other farmers, advisers and sectoral organisations, but described using them in different ways. Women gave greater weight to training, relational learning, exchanges with other women and the confidence gained through meetings and workshops; men referred more often to technical advice and procedural support. Women's innovation was not confined to production: four of the eight women pursued diversification or market initiatives, while seven engaged in social or relational innovation, including networking, supporting other entrepreneurs and increasing the sector's visibility. The clearest

reported gender difference concerned legitimacy. Some women did not initially identify themselves as innovators despite having introduced significant changes, and several recounted instances in which suppliers, clients or other farmers questioned their competence or sought to negotiate with a male relative. The findings do not establish that cooperative boards reproduce these patterns directly. They do, however, show why access to collective organisations alone may not ensure equal influence: recognition, time, resources and access to informal networks affect whether members can convert participation into decision-making power.

Discussion. The findings highlight a distinction between democratic rights on paper and the conditions that allow members to exercise them. Cooperative principles provide a strong basis for equal participation, but women's capacity to shape decisions can remain limited when their work is less visible, their expertise is questioned, or care responsibilities and unequal access to resources restrict their time and networks. In this context, gender quotas can help address persistent underrepresentation and make governing bodies more reflective of their membership. Their value depends on how they are implemented: numerical targets should be accompanied by transparent nomination and election procedures, sex-disaggregated monitoring, leadership training and mentoring, care-compatible meeting arrangements, and support for networking and access to finance, digital connectivity and administrative resources. These measures can help ensure that representation brings voice, influence and accountability.

Contributions and Implications. The paper links cooperative governance with empirical research on gender and agrarian innovation. It shows how evidence from the Spanish Living Lab can inform the analysis of women's access to leadership without treating a study of innovation pathways as direct evidence about board composition. Women in the study contributed technological, productive, market, social and relational innovations; the institutional challenge is to ensure that these contributions are recognised and represented in collective decisions. Cooperatives can respond by embedding equality objectives in their statutes and internal rules, setting measurable representation goals, publishing progress indicators and creating clear routes from membership, training and committee work into governing roles. Public authorities and rural-development programmes can reinforce these efforts by including inclusive governance in funding criteria and evaluation. Such measures would support members' equal rights while strengthening democratic legitimacy, broadening the knowledge available to cooperative decision-makers and contributing to more resilient and inclusive rural economies.

Keywords: Cooperatives; Gender equality; Governance; Women's leadership; Rural innovation

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Beyond Tokenism? Gender Diversity, Female Leadership and Profitability in Male-Dominated Cooperative Governance

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Abstract

Background

Gender diversity in governing bodies has become a strategic determinant of performance (Pham et al., 2025; Fernández-Guadaño et al., 2025). Its effect depends on "critical mass": token minorities remain invisible (Kanter, 1977), whereas three or more women can change decisions (Konrad et al., 2008; Arora, 2022). Upper echelons theory adds that board composition shapes strategic decisions (Hambrick & Mason, 1984).

Despite their equality values, cooperatives show persistent gender gaps and a "glass ceiling" that democratic governance does not automatically correct (Bouchard et al., 2025).

In Spain, Organic Law 2/2024 makes board parity mandatory for social economy entities only above 125 employees and €20 million in budget, excluding most cooperatives. In cooperatives, prior evidence on board gender diversity has focused on employee productivity (Meliá-Martí et al., 2024); its link with profitability, its non-linearity and the Management Board remain largely unexplored.

Aims

The study tests four hypotheses (Figure 1): gender diversity on the Board of Directors (H1.1) and on the Management Board (H2.1) has a non-linear relationship with ROE and ROA, and a female Chair (H1.2) or CEO (H2.2), i.e. a leader from the gender under-represented in leadership, moderates it.

Methods

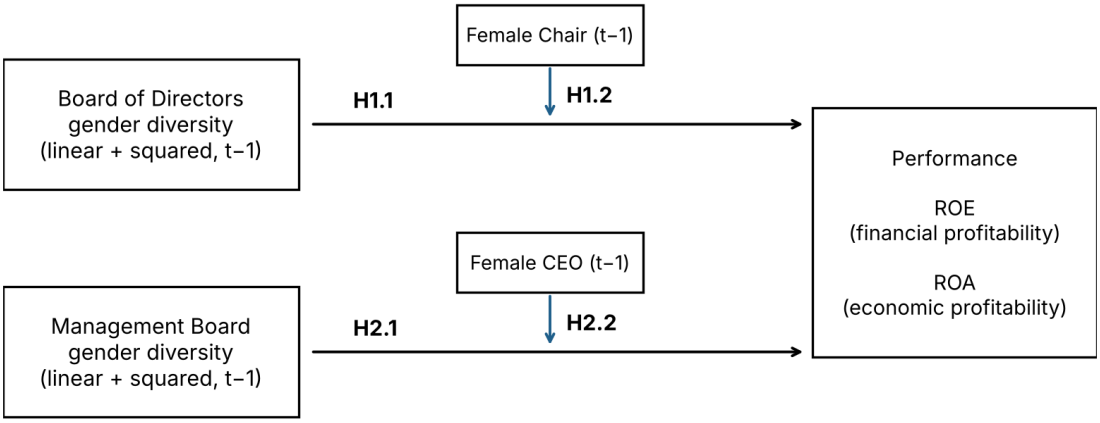
A sample of 150 Spanish cooperatives of all types with valid survey responses was drawn from the 1,329 with financial data in ORBIS. Annual accounts (2022–2024) are combined with a survey on the composition of governing bodies (2022–2023), lagged one year to reduce reverse causality. The analytical sample comprises 133 cooperatives (246 observations) for the Board of Directors and 51 (100 observations) for the Management Board, an optional executive body.

Four random-effects models (ROE and ROA for each governing body) share the specification:

$$Performance_{i,t} = \alpha + \beta_1 \cdot Women_{i,t-1} + \beta_2 \cdot Women^2_{i,t-1} + \beta_3 \cdot FemLeader_{i,t-1} + \beta_4 \cdot (Women \times FemLeader)_{i,t-1} + \beta_5 \cdot (Women^2 \times FemLeader)_{i,t-1} + \gamma \cdot Controls_{i,t-1} + \varepsilon_{i,t}$$

Performance is ROE or ROA; Women, the proportion of women on the Board of Directors or Management Board, measures gender diversity and is conditionally centered by leadership profile to reduce multicollinearity; FemLeader equals 1 if the Chair or CEO, respectively, is a woman. Controls (Table 1) include size, cooperative type, members' age and education, years of activity, women members and survey indices of barriers and enablers. Fixed effects are unfeasible because leadership barely varies within two years. As Sargan-Hansen tests detect correlation between unobserved cooperative effects and regressors in three models, a Mundlak (1978) check is run: it supports the Board results but not those for the Management Board.

Figure 1. Research model: gender diversity, female leadership and profitability in cooperatives



Controls (t−1): size, cooperative class, board age and education, years of activity, % women members, perceived barriers and enablers

Results

Women are under-represented at every level, and the higher the position, the lower their share: 34.4% of members, 27.8% of Management Board seats, 26% of CEOs, 22.5% of board seats and 20% of Chairs. Boards are also homogeneous: women hold on average 7.3% of seats on male-chaired boards and 86.2% on the few female-chaired ones.

In Board of Directors models (Table 1), greater diversity (more women) on male-chaired boards raises ROE up to 22.3% women, after which it declines. A female Chair reshapes the relationship, cancelling the gains from diversity (Wald test, $p = 0.16$).

For ROA, both curves are concave: the optimum is 22.4% women under a male Chair and around 61.5% under a female Chair (both significant), so in both profiles diversity improves efficiency up to a point. At each profile's usual composition (7.3% vs 86.2% women), ROA is equal (4.7% vs 4.8%, $p = 0.98$), and the gap between peaks (5.9% vs 9.6%) is not significant ($p = 0.47$), whereas ROE is 21 points lower under a female Chair (−0.210, $p < 0.01$).

Older cooperatives show lower ROE and ROA; boards averaging over 60, a 5.2-point lower ROA ($p < 0.05$).

In Management Board models, no gender term is significant at 5%. Under the Mundlak specification, however, a female CEO is associated with lower ROA (−3.2 points, $p < 0.05$) and ROE (−5.5, $p < 0.10$).

Discussion

H1.1 and H1.2 are supported, whereas H2.1 and H2.2 are not.

Diversity matters, but its effect depends on the starting composition, the Chair's gender and the profitability measure. The Blau diversity index is not significant at 5%, as it ignores whether boards are male- or female-dominated: adding women to male-dominated boards improves ROE and ROA up to about one in five seats, whereas adding men to female-dominated boards improves only ROA, at an asymmetric optimum. This only partly fits critical-mass predictions.

Equal ROA but lower ROE under female Chairs fits the DuPont decomposition (Soliman, 2008): equal asset efficiency may yield different equity returns under different financing, leverage or reinvestment policies.

Diversity matters at the Board's strategic level rather than in executive management; the negative female CEO result deserves further study.

Results mainly reflect structural differences between two segregated profiles rather than changes over time. Self-selection cannot be ruled out; findings are associations, and longer panels are needed.

Contributions and Implications

One of the first analyses of gender diversity and profitability covering all Spanish cooperative types, the study shows that:

1. Board gender diversity improves profitability up to a point, depending on the board's composition and the Chair's gender; female Chairs do not compromise efficiency (equal ROA), although ROE is lower.
2. Board diversity matters more than executive diversity, and boards averaging over 60 show lower ROA, calling for joint gender and generational renewal.

For policy, extending parity and transparency requirements to cooperatives below the thresholds of Organic Law 2/2024 would be consistent with cooperative values, alongside measures addressing barriers such as work-life balance and the lack of female role models.

Table 1. Random-effects estimates of gender diversity and profitability by governing body

Variables	Board of Directors: ROE	Board of Directors: ROA	Management Board: ROE	Management Board: ROA
Proportion of women (t−1)	0.9130***	0.1567**	−0.1211	−0.0720
Proportion of women² (t−1)	−3.0412***	−0.5180***	0.1833	0.0917
Female leader (t−1)	−0.2095***	0.0010	−0.0235	−0.0146
Female leader × women	−0.7144**	−0.5416***	0.1943*	0.0984
Female leader × women²	3.8508***	−0.2616	0.1575	−0.0063
Size (ln total assets)	−0.0070	−0.0013	0.0186	0.0110
Years of activity	−0.0017***	−0.0006***	−0.0008	−0.0003
Average age 50–60 (ref. 30–40)	−0.0118	−0.0284	0.0295	−0.0044
Average age over 60 (ref. 30–40)	−0.0646	−0.0519**	0.0798	0.0227
Members' education	0.0205	−0.0044	0.0028	−0.0223
% women members	−0.0925	−0.0332	−0.1969***	−0.0802**
Enablers index	0.0069	−0.0006	0.0109	0.0037
Barriers index	0.0113	−0.0031	0.0135	0.0056
Cooperative type	YES	YES	YES	YES
Observations / cooperatives	246 / 133	246 / 133	100 / 51	100 / 51
R^2 overall (between)	0.374 (0.563)	0.233 (0.286)	0.358 (0.473)	0.321 (0.388)
Wald χ^2 (model)	130.73***	205.95***	168.12***	48.40***
Women's share joint test, p (male / female leader)	<0.001 / 0.157	<0.001 / 0.035	—	—
Sargan-Hansen χ^2 (p)	4.28 (0.370)	9.79 (0.044)	14.93 (0.011)	13.40 (0.020)
Breusch-Pagan χ^2 (p)	7.53 (0.003)	9.26 (0.001)	0.07 (0.394)	2.83 (0.046)
Mean VIF	3.36	3.36	3.54	3.54

Note: Female leader = female Chair (Board of Directors) or CEO (Management Board). Random-effects models; robust standard errors clustered by cooperative (not shown). Wald tests (χ^2, 2 df) of the joint significance of the linear and squared terms of women's share within each leadership profile. Mundlak checks (Wald test on cooperative means): Board ROA, $\chi^2 = 1.21$ ($p = 0.55$); Management Board, $\chi^2 = 12.30$ (ROE) and 9.59 (ROA), $p < 0.01$. Under Mundlak, female CEO coefficients are −0.0548* (ROE) and −0.0322** (ROA).

*** $p < 0.01$; ** $p < 0.05$; * $p < 0.10$.

Keywords: Social Economy; Corporate Governance; Gender Diversity; Female Leadership; Cooperatives; Profitability

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Who sees the cooperative culture? Evidence from Brazil's first national survey of cooperative identity

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Abstract

Background

Cooperatives claim a distinctive identity, which the International Co-operative Alliance defines as a set of values and principles that members are expected to share and to practise (International Co-operative Alliance, 1995). Whether that identity survives growth is an old question. The degeneration thesis holds that cooperatives drift towards conventional business as they grow and professionalise (Cornforth, 1995; Bretos et al., 2020), institutional theory expects cooperatives under the same rules as investor-owned firms to come to resemble them (DiMaggio & Powell, 1983; Bager, 1994), and the oligarchy argument predicts that growth separates those who decide from those they represent (Michels, 1915; Spear, 2004). Most of the evidence rests on case studies and structural indicators, so little is known about how the people inside cooperatives perceive their culture at scale, or about whether leaders and members see the same organisation.

Aims

This paper asks whether cooperative culture erodes as cooperatives grow, and who inside a cooperative sees it. It uses Brazil's first national survey of cooperative culture, run in 2026 by Sistema OCB, the country's apex cooperative organisation, to test the degeneration and isomorphism predictions with registry measures of size, professionalisation and regulatory exposure, to compare leaders and members of the same cooperative, and to relate members' participation and the barriers they report to how they see their cooperative. A secondary objective is to give the survey instrument, developed by researchers at the Pontifical Catholic University of Paraná, its first confirmatory test (Weymer et al., 2025).

Methods

The survey reached 9,753 members, employees, elected councillors and hired executives in 1,321 cooperatives, and 88% of respondents were linked to the national cooperative registry. The instrument has 32 items in five dimensions on a five-point agreement scale, and the total score is the IGIC. We fitted ordinal confirmatory factor models with a WLSMV-type estimator clustered by cooperative, tested measurement invariance across role, sector, age band and region, and compared the proposed structure with random groupings of the same items. Role and age effects use cooperative fixed effects, so they compare respondents of the same cooperative; sector and cooperative characteristics use random-intercept models with registry covariates. Effects are standardised differences with Holm-corrected p-values. The analyses of the leader-member gap by cooperative size, of the items on which leaders and members diverge, and of participation and barriers were defined after the confirmatory results and are reported as exploratory.

Results

The instrument measures one dominant construct with full scalar invariance across the four groupings, so every comparison below compares the same construct. Average culture scores show no association with cooperative size, professionalisation or regulatory exposure: within sector, the effects of size, staffing and years since foundation are near zero with narrow confidence limits, and credit cooperatives, the most regulated sector, score slightly higher than agricultural ones. Within the same cooperative, elected councillors and hired executives rate the culture about four tenths of a standard deviation above members.

This gap widens with size. It is close to zero in the smallest fifth of cooperatives and reaches 0.68 standard deviations in the largest, where members' scores fall and leaders' scores rise while the average holds. Leaders and members diverge least on the items about cooperative values and most on access, that is, on cooperative education, information, support and voice. Members who take part in general assemblies rate the culture about one standard deviation above other members of the same cooperative, at the level of councillors. Members who report dominant groups they dislike, or who see no benefit in taking part, score close to a full standard deviation below members who report neither, and those with no information on how to take part score about half a standard deviation below. Lack of time, the most frequent barrier, reported by about a third of members, is unrelated to culture. Personal values exceed perceived practice in every role, sector, age band and region, and the ten lowest-rated items all describe organisational practice, led by having room to voice one's opinions.

Discussion

The classic degeneration thesis predicts lower culture in larger cooperatives. In this survey, growth leaves the average unchanged and widens the distance between leaders and members. This is the pattern that the oligarchy argument describes and that governance research on member-based organisations anticipates (Michels, 1915; Spear, 2004; Cornforth, 1995), and it may explain why studies of average levels find no degeneration: the divergence cancels out in the mean. The analysis is exploratory, and size is correlated with the age and staffing of the cooperative, so the more cautious reading is that the gap is larger in larger and older cooperatives. Members hold cooperative values almost as firmly as leaders and see less of what the cooperative offers, which locates the deficit in organisational practice and in members' access to it. The direction of the participation associations is open, since members who value the culture may be the ones who take part. Still, information about how to take part and the openness of governance to newcomers are within a cooperative's control, and they are the conditions under which members come to see the cooperative as its leaders do (Birchall & Simmons, 2004).

Contributions and Implications

The paper gives the first large-scale test of the degeneration and isomorphism predictions with perception data from inside cooperatives, on a national sample linked to registry data, and the first confirmatory evidence on a Brazilian instrument of cooperative identity. Its main contribution is to relocate the degeneration question from the level of culture to the distance between those who govern and those who are governed. For federations, four uses follow. Report the leader-member distance next to the level. Focus on large cooperatives, where mechanisms that bring members closer to decisions, such as local nuclei and committees, matter most. Act on information and on the openness of governance, the two barriers that relate most strongly to how members see the cooperative and that lie within its control. Measure again with the same core, since scalar invariance makes results comparable across groups and waves, and other national federations can run the same core and compare.

Keywords: cooperative identity; degeneration; governance; participation; Brazil

Theme(s): Education and Training about / for Cooperatives; Measuring Impact and Performance of Cooperatives

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Legitimate but Illegible: The Vicious Circle of Cooperative Invisibility

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Abstract

Cooperatives are among the world's most widespread and economically significant organizational forms, yet research repeatedly suggests that they remain poorly understood by the general public. This article examines how cooperative awareness is perceived internationally and explores the mechanisms through which organizational visibility fails to translate into recognition of the cooperative form itself. Drawing on qualitative data collected from cooperative experts, researchers, and practitioners representing 22 countries, the study adopts an abductive approach combining thematic analysis with organizational legitimacy and category theories.

Results

The findings reveal four recurring patterns shaping cooperative awareness: surface-level familiarity, historical associations, invisibility in public discourse, and sector-specific recognition. These patterns are interpreted as mechanisms that help explain why cooperatives remain widely used but poorly recognized as a distinct organizational form. Building on these findings, the article introduces the concept of form illegibility, referring to a situation in which organizations enjoy high levels of pragmatic legitimacy while the organizational form itself lacks cognitive legitimacy. The analysis identifies four mutually reinforcing mechanisms underlying this condition: non-aggregation, sector absorption, legacy stigma, and institutional neglect.

Contributions and Implications

The study contributes to legitimacy theory by demonstrating that organization-level legitimacy does not automatically aggregate into form-level cognitive legitimacy. It further distinguishes between two forms of invisibility: taken-for-granted invisibility, which reflects institutional strength, and unrecognized invisibility, which indicates a failure of institutional reproduction. By explaining how cooperative awareness, education, and research become locked into a self-reinforcing cycle, the article offers a theoretical framework for understanding the persistence of organizational forms that remain socially important yet cognitively illegible.

Keywords: Cooperatives; Legitimacy; Cognitive legitimacy; Cooperative education; Cooperative awareness; Form illegibility

Theme(s): Education and Training about / for Cooperatives

INCITE INOVASOL: Intercooperation Network of Technological Incubators for the Solidarity Economy and Popular Cooperativism in Bahia – Brazil

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Abstract

The Popular and Solidarity Economy constitutes a field of economic and social organization built upon collective practices of work, production, commercialization, and consumption, grounded in cooperation, self-management, solidarity, and democratic participation. Within this field, Solidarity Economy Enterprises (SEEs), cooperatives, associations, workers' networks, support organizations, universities, and public institutions play an important role in constructing alternatives for employment and income generation and territorial development. Beyond their economic dimension, cooperatives constitute spaces for collective organization, participation, learning, and the exercise of self-management. However, these enterprises face challenges related to management, commercialization, access to credit, technologies, training, innovation, and public policies, requiring support processes that consider the social, economic, and territorial specificities of the actors involved. In this context, Technological Incubators of Popular Cooperatives (ITCPs), linked to public universities, play an important role in connecting academic knowledge with knowledge produced by workers and communities. Through teaching, research, and extension activities, incubators develop training processes, advisory activities, follow-up, and knowledge production aimed at strengthening collective organizations and expanding their autonomy. ITCPs thus establish relationships between universities and society and contribute to strategies that respond to the concrete demands of solidarity economy enterprises. However, given the diversity and complexity of challenges found across different territories, coordinated action among incubators can expand opportunities for sharing experiences, methodologies, and social technologies. It is within this perspective that the INCITE INOVASOL Bahia Network emerges as an experience of institutional and territorial intercooperation among incubators, universities, collective enterprises, and partner institutions. This paper aims to analyze the experience of the INCITE INOVASOL Bahia Network as an intercooperation strategy among Technological Incubators of Popular Cooperatives, highlighting its contributions to training, shared knowledge production, the development of social technologies, and the strengthening of the autonomy of cooperatives and other Popular and Solidarity Economy enterprises. It also seeks to understand how collaboration among universities, collective organizations, and partner institutions contributes to addressing challenges related to management, training, commercialization, innovation, and access to public policies. The study adopts a qualitative, descriptive, and analytical approach based on the systematization and reflection upon the experience of the INCITE INOVASOL Bahia Network. The analysis considers the activities developed by the network and the articulation processes involving researchers, students, scholarship holders, collective enterprises, social organizations, and public institutions. The experience is examined through the dimensions of education and training for cooperation, the production and circulation of knowledge and social technologies, and institutional and territorial articulation. The activities include training processes, advisory services, and support for enterprises, taking into account their specificities and demands. The main topics addressed include management, commercialization, communication, solidarity finance, agroecological transition, and access to public policies. The coordinated work of researchers and scholarship holders, together with a shared management structure, enables exchanges among different experiences and promotes the circulation of knowledge and methodologies

developed within the territories. The experience of INCITE INOVASOL demonstrates that networking expands the contribution of incubators to strengthening the Popular and Solidarity Economy. Sharing methodologies, experiences, and social technologies enables knowledge produced in different contexts to be collectively disseminated, discussed, and re-elaborated. This dynamic helps overcome the fragmentation of initiatives and supports the construction of common strategies in response to challenges affecting different enterprises and territories. Intercooperation, therefore, is not limited to administrative coordination among institutions; rather, it constitutes a process of collective learning and capacity building. One relevant dimension concerns education for cooperation. Training processes developed through incubation go beyond technical capacity building for enterprise management and incorporate self-management, democratic participation, collective organization, decision-making, and networking. This approach strengthens the ability of participants to engage in decision-making processes and develop their own strategies for organizational sustainability. Training is thus understood as an ongoing process of building autonomy and strengthening cooperative relationships. The diversity of the enterprises involved is another important element of the experience. Interaction among family farming cooperatives, associations, waste-picker groups, artisan networks, and other organizations promotes the exchange of knowledge and experiences and fosters mutual learning. Strategies developed by different groups can be shared and reworked according to the specificities of each territory, recognizing the knowledge produced by the actors themselves. Network-based action therefore acknowledges that there is no single organizational model or universal solution to the challenges faced by the Popular and Solidarity Economy. Another important dimension concerns the articulation of economic, social, environmental, and territorial aspects. Issues such as production organization, value addition, commercialization, agroecological transition, communication, and access to public policies are connected to the concrete living and working conditions of the actors involved. Territories are therefore understood as spaces of relationships, knowledge, practices, identities, and conflicts in which different strategies of social reproduction are constructed. Incubator activities must consequently consider territorial specificities and value the knowledge and experiences of the groups involved. The production and circulation of social technologies is also a strategic dimension of intercooperation. Training methodologies, management tools, commercialization strategies, and organizational experiences developed by incubators and enterprises can be systematized and shared, expanding their potential application in different contexts. Such circulation does not imply the automatic reproduction of models, but rather creates possibilities for adaptation and re-elaboration based on the needs and knowledge of each territory. The network therefore functions as a space for collective knowledge production and circulation, strengthening both the enterprises and the institutions involved in incubation processes. In the context of Bahia, this experience is particularly relevant given the territory's diversity and the presence of different forms of family farming and Popular and Solidarity Economy organization. Networking makes it possible to connect experiences, strengthen organizations, and expand their capacity to influence territorial development processes. At the same time, it strengthens the role of public universities in socially engaged initiatives in which teaching, research, and extension are connected to concrete societal demands. The INCITE INOVASOL experience demonstrates that intercooperation can articulate different scales and actors. At the enterprise level, it contributes to organizational strengthening and autonomy; at the territorial level, it promotes articulation among organizations and institutions; and at the network level, it enables the shared production and circulation of knowledge, methodologies, and social technologies. It is concluded that the INCITE INOVASOL Bahia Network constitutes an experience of institutional and territorial intercooperation that contributes to strengthening the Popular and Solidarity Economy and popular cooperativism. By promoting the circulation of knowledge, methodologies, and social technologies, the network expands collective capacity for action, strengthens enterprise autonomy, and contributes to territorial development processes based on cooperation, solidarity, social participation, and autonomy.

Keywords: Popular and Solidarity Economy; Popular Cooperativism; Technological Incubators; Intercooperation; Territorial Development

Theme(s): Education and Training about / for Cooperatives; Public Policy and Institutional Support for Cooperatives

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Cooperative Education: Contributions of the Training Process in Family Farming Agro-Industries

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Abstract

Family farming plays a strategic role in promoting food security, generating employment and income, and fostering territorial development in Brazil. It accounts for a large proportion of agricultural establishments, although it continues to face structural constraints related to market access, value addition, management, and collective organization. Wanderley (2009) understands family farming as encompassing a diverse range of social actors, including small-scale farmers, agrarian reform settlers, forest and water peoples, Indigenous peoples, and quilombola communities. Within the framework of public policies, Law No. 11,326/2006 defines family farmers based on criteria related to the size of the establishment, the predominant use of family labor, income, and family management. The 2017 Agricultural Census identified 3,897,408 family farming establishments in Brazil, representing 76.8% of all agricultural establishments. In Bahia, 762,848 agricultural establishments were recorded, of which 593,411 were classified as family farming establishments, representing 77.8% of the state's total establishments and approximately 15.2% of the country's family farming establishments (IBGE, 2019). In this context, collective organization through associations and cooperatives constitutes an important strategy for strengthening production, marketing, management, and access to public policies. The objective of this study is to analyze the process of strengthening family farming in the state of Bahia through the articulation of collective organization, cooperative education, and public policies aimed at agro-industrial development, value addition, income generation, and the revitalization of local economies, considering the training of professionals working with family farming associations and cooperatives and the participatory development of planning and management instruments for family farming agro-industries. The research adopted a qualitative approach based on the principles of action research, understood as a cooperative and participatory process of knowledge production articulated with the transformation of reality (Thiollent, 2011). The training and analytical process was based on initiatives developed by the Companhia de Desenvolvimento e Ação Regional (CAR), affiliated with the Secretaria de Desenvolvimento Rural (SDR), particularly within the framework of policies aimed at strengthening family farming agro-industries. The study considered the experiences of the Bahia Produtiva Project, developed between 2015 and 2022, and the Bahia que Produz e Alimenta Project, implemented from 2022 onward, both financed by the World Bank. The analysis addressed the training of professionals working with family farming agro-industries, institutional collaboration between universities and family farming organizations, and the development of the Participatory Business Plan as a methodological and educational strategy. The Bahia Produtiva Project promoted investments in infrastructure, technical assistance, and market access, with emphasis on the establishment and upgrading of approximately 400 agro-industries. From 2022 onward, the Bahia que Produz e Alimenta Project continued investments in productive infrastructure, technical assistance, productive inclusion, and market access, strengthening the integration of production, processing, and marketing. In 2024, multidisciplinary technical teams were established, comprising Business Agents, Technical Management Agents (ATEGs), and Specialized Technical Production Agents (ATEPs), working with family farming associations and cooperatives. In 2023, in partnership with the Universidade Federal do Recôncavo da Bahia (UFRB), a network was established involving the Universidade Federal do Sul da Bahia (UFSB), the Universidade Federal do Oeste da Bahia (UFOB), the Universidade do Estado da Bahia (UNEB),

the Universidade Estadual de Feira de Santana (UEFS), the Universidade Federal de Sergipe (UFS) e the UNICAFES Bahia, with the aim of developing a Cooperative Education training program grounded in the principles of Rural Education. The training involved 313 professionals from family farming agro-industries and 32 educators from the network, in partnership with the Minitério do Desenvolvimento Agrário e Agricultura Familiar (MDA) of the Federal Government. As an outcome, a Participatory Business Plan for family farming agro-industries was developed, conceived as a collective process for knowledge construction, decision-making, and strengthening the autonomy of individuals and organizations within the territories. The process brought together scientific knowledge, local knowledge, and family farmers' experiences to identify the potential, needs, resources, and strategies related to production, organization, marketing, and the sustainability of collective enterprises. The results indicate that Cooperative Education training, grounded in the principles of Rural Education, goes beyond a strictly technical training perspective by recognizing family farmers as protagonists in their organizational and development processes. From this perspective, professionals act as educational advisors and mediators of dialogical learning processes, integrating democratic management, collective organization, ethnic-racial relations, gender and generational dimensions, technological production and innovation, food sovereignty and security, agroecology, solidarity economy, and territorial development. The training approach proved to be comprehensive, territorially grounded, and socially committed by integrating scientific knowledge, the knowledge of social actors, and the concrete realities of the territories. Within this process, the Participatory Business Plan assumes both an educational and political character, as it enables participants to collectively analyze their circumstances, establish priorities, make decisions, and develop strategies for the development of their enterprises. The experience therefore demonstrates that educational processes articulated with public policies can contribute to overcoming a strictly technical conception of technical assistance and management, strengthening processes of autonomy, participation, and collective organization. The experience analyzed contributed to the integration of public policies aimed at strengthening family farming, education, agro-industrial development, and territorial development. The articulation between Cooperative Education and Rural Education enabled the development of training processes linked to the concrete needs of collective organizations and family farming agro-industries. As an outcome of this process, the training experience culminated in the institutionalization, in 2025, of the Lato sensu Graduate Program in Management of Family Farming Agro-industries, with a total workload of 408 hours. The experience demonstrates that professional training connected to territories, combined with the participatory development of planning and management instruments, can strengthen the governance of associations and cooperatives, expand the autonomy of social actors, improve management processes, and contribute to the economic and social sustainability of family farming agro-industries. It is concluded that Cooperative Education, grounded in the principles of Rural Education, constitutes a relevant strategy for integrating public policies, strengthening collective organization, and promoting socially grounded territorial development processes in the state of Bahia.

Keywords: Cooperative Education; Rural Education; Family Farming; Family Farming Agro-industries; Collective Management

Theme(s): Education and Training about / for Cooperatives

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7. Agri-Food Cooperatives

Research streams: Agri-Food Cooperatives

23 contributions

Scaling community-supported food businesses through regional umbrella organizations: A Qualitative Comparative Analysis of 15 cases in Germany and Switzerland

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Abstract

Background

Community-Supported Food Businesses (CSFBs) exchange goods or services for money through solidarity-based, membership-driven, transparent mechanisms rather than conventional market pricing (Rommel et al., 2024). By circumventing price pressures in food markets, CSFBs gain greater freedom for sustainable practices and become more economically resilient. Community-Supported Agriculture (CSA) is the most prominent CSFB model; examples from food processing and retail include community-supported bakeries, breweries, and retailer-cooperatives. Despite their increasing popularity in Germany, CSFBs remain niche. Scaling this emerging community-supported food economy (CSFE) is crucial to amplify its positive impacts (Lam et al. 2020) and strengthen regional food-system resilience.

This study focuses on scaling impact - not the size of individual organizations. Regional scaling means cultivating a broader, more diverse CSFE landscape with more numerous, resilient, and well-connected businesses along the value chain, embedded in a supportive entrepreneurial ecosystem. Two central levers for such scaling are (I) strong regional networks among existing CSFBs and (II) system service providers (SSPs) delivering tailored key services such as financing and consulting (Zech et al., 2025). While several regional CSFB networks have been initiated across Germany to accelerate this process, it remains unclear which specific configurations of network properties, network actions and context factors actually drive successful scaling.

Objectives

The objective is to identify the necessary and sufficient configurations of conditions that enable impact-scaling of the regional community-supported food economy. This addresses several research gaps by broadening the focus from the CSA-movement to the wider CSFB context. It examines the role of inter-organizational collaboration and extends the research on system service providers and their relevance for scaling within post-growth organizations.

Methods

The study employs a Qualitative Comparative Analysis (QCA) design to compare regional CSFB networks in German-speaking countries. Unlike traditional linear models, QCA uses Boolean algebra to identify causal pathways and equifinality—recognizing that different combinations of conditions can lead to the same outcome. The study applies QCA to a mid-n sample of 15 cases, ensuring a wide variation in conditions to guarantee empirical diversity (Ragin, 2000). Each of the cases is a regional umbrella organization (“network”) of CSFBs in a German-speaking country. The sample includes a broad range of configurations, ranging from loosely coupled groups of CSAs to highly integrated multi-stakeholder cooperatives.

Data analysis involves systematic coding of qualitative case descriptions, semi-structured interviews and quantitative indicators. We use a fuzzy-set approach (fsQCA) for calibration to account for the variety of cases and provide a more fine-grained analysis.

The outcome of interest – scaling of the impact of CSFBs on a regional level - is operationalized as a composite indicator on two levels: (1) the business level (aggregate) and (2) the network level. The analysis is structured around three dimensions of conditions regarding their role in the (non-)occurence of this outcome, namely (I) *network properties*, including cooperative business models and the degree of formal and functional integration, (II) *network activities*, specifically focusing on the scaling effects of activities and (III) *context*, understood as characteristics of the Regional Entrepreneurial Ecosystem (REE), such as the availability of supportive System Service Providers (SSPs), and the overall market environment for sustainable, regional food

Results & Discussion

Data collection and data analysis are still ongoing. We expect preliminary results and discussion items to be available at the time of presentation.

Potential Contributions & Implications

The study will contribute to debates on agri-food transitions by demonstrating how community-supported business models can expand their impact through cooperation and ecosystem support rather than market expansion. Conceptually, the study extends the literature on scaling frameworks to clarify how collaboration and supportive infrastructures enable scaling in a post-growth era. It furthermore illuminates interesting parallels and differences between different variants of CSFB-networks with regards to scaling dynamics. Methodologically, it expands the slim body of empirical QCA-studies on scaling. Practically, it will provide guidance for CSFBs, regional networks, and SSPs by identifying which specific configurations of network activities and regional support best foster resilience and regional scaling.

Keywords: cooperative food economy, scaling, regional networks, community-supported agriculture, Qualitative Comparative Analysis

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Cooperativism, innovation, and university-territory integration: strengthening the licuri production chain within sustainable family farming in Bahia, Brazil

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Abstract

This study analyzes the interplay between the university, rural education, and cooperativism in upgrading the licuri (*Syagrus coronata*) production chain in the semi-arid region of Bahia, Brazil. It takes as its unit of analysis the cooperative experience involving the Federal University of Recôncavo da Bahia (UFRB), the Sertão Agricultural Family School (EFASE), and the Regional Cooperative of Family Farmers and Extractive Workers of the Solidarity Economy (COOPERSABOR). The study addresses how the integration of scientific knowledge, traditional knowledge, place-based training, and collective organization can help overcome technological limitations and increase the value added to licuri within family farming. Analytically, the experience is understood through the concepts of solidarity economy, sociotechnical innovation, knowledge co-construction, and territorial development; this perspective recognizes that innovation is not limited to the generation of technology but involves adapting it to the practices, production structures, and collective strategies of local stakeholders. The objective was to analyze how this institutional collaboration contributed to the development, validation, and transfer of technologies for processing and preserving licuri products, as well as to the strengthening of the cooperative organization. The study employed a case study approach, combining a documentary analysis of the project and its results with experimental evidence generated during the development of licuri flour. Sources of evidence included information on the history and production structures of EFASE and COOPERSABOR; records of processing and technology transfer activities; and physicochemical and nutritional composition data obtained from an experimental study linked to the initiative. Regarding the technological component, a comparison was made between flours produced from dried licuri kernels and from licuri press cake a byproduct of oil extraction using the Controlled Drying Method with a Dehydrator (MSCD). The flours were characterized in terms of pH, water activity, moisture, acidity, protein, carbohydrate, mineral, and lipid content, as well as fat profile and vitamin C levels. The results showed that the press-cake flour contained 23.33% protein, 38.50% carbohydrates, and 4.01% minerals, while the kernel flour contained 62.67% lipids and 9.95 mg/100 g of vitamin C. Both exhibited a water activity of 0.164, indicating high stability regarding water availability and good preservation potential when properly packaged. These results demonstrate that technological processing can transform a raw material and a by-product already integrated into local practices into ingredients with unique characteristics and potential for use in new food products. From an organizational standpoint, COOPERSABOR provides a collective infrastructure for coordinating farmers and extractivists, as well as for production, processing, and marketing, underpinned by a history rooted in the solidarity economy. The cooperative already markets various licuri-derived products and recorded a gross revenue of R$ 2.4 million in 2022, highlighting an economic foundation upon which technological diversification can build. EFASE, in turn, functions simultaneously as a space for education, production, and experimentation; it operates a licuri processing unit and maintains ties with local agro-extractivists. The university contributes laboratories, analytical methods, student training, and intellectual property support, while

EFASE enables field-based experimentation, and COOPERSABOR represents the production organization and marketing arm. The primary evidence of knowledge co-construction lies, therefore, in the combination of these diverse resources and competencies: existing community knowledge and products guide the identification of technological challenges; the university systematizes and validates methods; and territorial institutions participate in adapting and transferring the solutions. Experience also demonstrates that technology transfer is more robust when it takes place during the development process itself through testing at partner sites, the preparation of technical materials, and the participation of students acting as intermediaries between the laboratory and the local setting. Rather than a linear relationship of knowledge transfer, a learning loop emerges in which local production challenges inform research, and scientific findings flow back to the organizations for application and refinement. The findings lead to the conclusion that the strengthening of the cooperative stems not merely from the creation of new products, but from the expansion of the collective capacity to produce, standardize, ensure quality, and master technologies related to licuri. The UFRB–EFASE–COOPERSABOR integration demonstrates the potential to bridge the gap between academic research and production needs, strengthen the organizations' technological autonomy, and expand opportunities for value addition. However, the available evidence primarily supports outcomes related to technology, organization, and institutional coordination; at this stage, it does not allow for claims regarding long-term quantitative effects on income, adoption at scale, or actual market expansion. The initiative's central contribution lies in building a territorial innovation architecture where cooperativism, rural education, and science complement one another to valorize socio-biodiversity, support strategies for living with the semi-arid environment, and strengthen family farming. The experience suggests that innovation policies and projects focused on socio-biodiversity can achieve greater effectiveness when designed with local organizations rather than merely for them by coordinating scientific infrastructure, training, collective production, and mechanisms for technological mastery.

Keywords: Solidarity economy; Socio-biodiversity; University extension; Caatinga; Agro-extractivism

Theme(s): Agri-Food Cooperatives; Social Innovation, Community Development, and Civic Wealth Creation

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Values-based value chain organization in the US Midwest: cooperative spirit over structure?

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Abstract

Key research question: value chains, as meso-levels that operationalize exchanges from production to consumption, can either impede or empower stakeholders in implementing sustainable practices. Yet understanding how value-chain organization contributes to transformative efforts remains challenging. Transformative initiatives emerge from mixed institutional logics and build on existing institutional developments, leading to diverse transformative pathways (De Herde, 2023; Vermunt et al., 2020). This research engages with an empirical gap highlighted in both institutional innovation (Cholez et al., 2023) and social-ecological literature (Baldwin et al., 2024). Examining the social-ecological fit of value-chain configurations, understood as the extent to which governance arrangements, stakeholder interactions, and context jointly support stakeholders' transformative efforts, helps clarify the leverage that meso-level organizational constructs offer in sustainability transitions, complementing indicator-based assessments of sustainability outcomes.

Theory: the research builds on a configurational framework that views value chains as dynamic meso-level analytical units composed of interacting dimensions of governance, stakeholder interactions, and context. These dimensions jointly shape social-ecological fit, understood as an emergent and continuously reassessed property of value-chain configurations, and thereby influence stakeholders' capacity to sustain transformative efforts over time (De Herde & Dufays, 2024).

Methods: The inquiry relied on semi-structured interviews conducted in 2025-26 with stakeholders (farmers, cooperative managers, processors, wholesalers, brandholders) involved in values-based value chains in the US Midwest across horticulture, cereal, dairy, and meat production. The interviews combined open-ended questions about stakeholders' experiences and positionality within value-chain developments with follow-up questions informed by the framework dimensions. Publicly available information was used to contextualize and complement the interview material. This presentation outlines the preliminary findings of this inquiry, examining how cooperation dynamics enable diverse value-chain configurations to support transformative efforts.

Findings: The cases reveal a strong diversity of value chain organizational features. From the farmers' perspective, they are characterized by context-dependent choices regarding collective or individual integration of processing, wholesaling and/or branding. Collective values-based developments cluster around mid-scale processing plants, wholesaling facilities and brands still held or redeveloped by farmers. Significant cases hinge on individual farmers' initiatives compensating for the lack of remaining infrastructures at regional scale, for themselves first, and by extension for other farmers.

Integration is not only a means to reclaim value added and bargaining power along the chain. It also reflects the re-development of processing practices that preserve the nutritional or gustative qualities of differentiated raw products. In both individual and collective strategies, farmers balance the challenge of navigating the profitability of downstream value chain stages against short-term profitability goals as suppliers. They also weigh the opportunity to absorb and redistribute costs that mainstream, larger-scale stakeholders would not cover to support heterogeneous farming profiles within the community.

Privileging cooperative spirit over formal governance structure and contractual formalization, navigating the social dilemma this lack of formalization generates, the Midwestern cases are permeated with concerns for reciprocity and long-term community development. They channel a constellation of hope and initiative

for change into pragmatic, incremental value chain developments. However, they remain dependent on close-knit community relationships that foster trust and reciprocity among farmers and with other, sometimes co-existing, food system stakeholders providing institutional relays and diverse values-appreciative outcomes.

Potential implications: values-based value chains present variably formalized and context-dependent profiles. The cases examined rely on immaterial resources that anchor cost redistribution and reciprocity in diffused, long-term community concerns. The pragmatic prioritization of cooperative spirit over formalized structures in the US Midwest illustrates the diverse ways farmers engage, with others, in re-developing values-based, multistakeholder ecosystems.

Keywords: social-ecological fit, food system transformation, sustainability transition, supply chain coordination, informal cooperation

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Degeneration by digitalisation? The case of the Spanish cooperative Hortacuina

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Abstract

Background

Since 2025, seven planetary boundaries have been crossed (Williams et al., 2025), which calls for deep changes in societal systems (Kallis et al., 2025), including in the case of agroecology (AE) through "profound systemic changes" (Dale, 2023: 9). To cope with these challenges, social economy actors can "channel a sufficient and decent income to the producers" (Meliá-Martí, 2024: 13), who include smallholding farmers struggling with a growing "industrialisation of organic agricultural systems" (Galiana-Carballo et al., 2024: 9). The latter also face increasing pressures to improve their productivity through digitalisation (Meliá-Martí, 2024, p. 11), and risk depending on large corporations since "many innovation processes taking place in the agri-food sector are driven by large business organizations" (Meliá-Martí, 2024: 12).

AE relies upon core principles such as "Soil & animal health" or "Participation" (Wezel et al., 2020), and its mission-driven organisations aim for systemic changes through the multiplication of place-based experimentations. Those involve using external digital technologies, and thus small-scale farmers risk being excluded from technology design and adoption processes. Public policies at the European level are pushing in that direction (Barabanova et al., 2023: 5), and their institutional logic tends to focus on the economic dimension of sustainability (Lezoche et al., 2020). Besides, "digitalization can disempower rural communities, resulting in an uneven balance of power between the more and the less digitally connected and skilled local users" (Barabanova et al., 2023: 27). Indeed, instruments like digital technologies are not neutral and can clash with AE principles, affecting "prefigurative organizing" and generating "organisational degeneration" (Schiller-Merkens, 2024: 469).

Digitalisation can create new dependencies (Duncan et al., 2021) and risks such as data ownership and control (Rose et al., 2023), especially if power lies in the hands of a few incumbents (Kenney et al. 2020). It could marginalise actors with low digital literacy, erode traditional livelihoods and local knowledge, or generate "bias towards collecting quantitative data" (Barabanova et al., 2023: 29). Indeed, alternative production modes facilitated by digitalisation are contested by AE actors (Duff et al., 2022; González Molina, 2026), who remain sceptical about technology-driven solutions to societal problems because of potential increased inequalities, resource-use intensity, loss of autonomy and power asymmetries within the agrifood system. But there are other ways to manage distributed irresponsibility in sociotechnical systems (Gossart & Srnec, 2024). For example, actors can "encourage the adoption of open-source software and promote the standardisation of data formats" (Barabanova et al., 2023: 36), which implies seeking "sufficiency in digitalisation" (Lange et al., 2022).

Aims

In this paper, we study the digital transformation of a Spanish agroecological cooperative and discuss possible risks of that digitalisation, notably mission-drift in the form of a distancing from AE principles.

RQ1: How can smallholding AE farmers diversify outlets to promote sustainable food systems?

RQ2: To what extent can the digitalisation of Hortacuina generate mission-drift?

We define AE as "the science of ecological processes applied to farming production systems." (AEP, 2024: 3). Regarding the Hortacuina SAT (*Sociedad Agraria de Transformación*), her collaborators talk about it as a cooperative and so do we in this paper. Indeed SATs are civic societies with socioeconomic mission (cf. Royal Decree 1981 "*Huertos familiars*"), which are "defined by cooperative values, efficient resource use, and mutual aid" (Román-Cervantes & Suárez-Domínguez, 2024: 107). As for digitalisation, it is the use of digital technology (software or hardware) to transform functions of the organisation (finance, HR…) and its core operations (food production, education…) (Matt et al., 2015). Concerning mission-drift, it means that an organisation gets further away from its core mission (Cornforth, 2014), which in the case of Hortacuina indicates that it seeks to scale deep and transform its local ecosystem, and the entire agrifood sociotechnical system (source: Hortacuina's legal status).

Methods

We used qualitative methods and carried out semi-structured interviews that were fully transcribed, complemented by documents from the cooperative and academic publications as well as grey literature. For their analysis, we are using immersive engagement that involves inductive readings ("reading parts or the whole data set for insights, themes, and patterns") followed by theme generation (Ravitch & Carl, 2016: 245-6).

Results

Our results provide an in-depth account of the creation of Hortacuina and its digitalisation process, and enables us to answer our RQ1. Follows a discussion to address RQ2 where we provide evidence of the type of digitalisation that can avoid mission-drift such as human centric design (Gasson, 2003).

Discussion

In the literature there is a lack of discussion about cooperatives' mission-drift due to their inability to target and contribute to systemic changes. We provide a discussion about Hortacuina: does that "(re-emerging mode of production, commons-based peer production has such potential"? Notably by supporting "innovation underlined by counter-hegemonic values" (Robra et al., 2023: 1)?

Contributions and Implications

Our main contribution sheds light on how small AE farmers join forces to gain resilience and achieve systemic changes in the digital era. It provides valuable insights for other AE organisations facing similar struggles, and offers promising comparative analyses, for example between our Spanish case and French organisations such as *L'atelier paysan* or *Manger Bio Services*.

Keywords: agroecology; digitalisation; systems change; mission-drift; sovereignty

Theme(s): Agri-Food Cooperatives; Technology, Digitalization, and Platform Cooperatives

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Absorptive Capacity, Innovation Capability and Performance in Agri-Food Cooperatives

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Abstract

Background

Agri-food cooperatives operate in increasingly complex and uncertain environments, characterized by market volatility, sustainability pressures, digitalization and the need to respond to the demands of members, customers and institutions. In this context, organizational capabilities are essential for explaining why some cooperatives are able to adapt and improve their performance. Among these capabilities, absorptive capacity - understood as the ability to acquire, assimilate, transform and exploit external knowledge - and innovation capability - understood as the ability to develop and implement new products, processes, practices and organizational solutions - are particularly relevant.

Aims

The aim of this study is to compare the independent influence of absorptive capacity and innovation capability on the performance of agri-food cooperatives. Specifically, the study analyses whether performance is explained to a greater extent by a cooperative's ability to absorb and use external knowledge or by its internal capability to innovate. It also examines whether both capabilities retain significant effects when they are introduced simultaneously into the model.

Methods

The research uses a firm-level database comprising 135 agri-food cooperatives in Spain. The empirical analysis is conducted using partial least squares structural equation modelling (PLS-SEM), following the SmartPLS approach and using the SmartPLS v. 1.4.1.8 software package (Ringle et al., 2024).

Absorptive capacity was measured using the scale proposed by Cohen and Levinthal (1990) and Lane et al. (2006), which comprises knowledge acquisition (three items), assimilation (four items), transformation (four items) and exploitation (three items). Innovation capability was assessed using the scale proposed by Prajogo and Sohal (2006), which comprises product innovation (five items) and process innovation (four items). Finally, a global measure of perceived firm performance relative to competitors was used (Olson et al., 2005). Specifically, performance was measured using a four-item scale combining the scales proposed by Chirico et al. (2011), Kellermanns et al. (2012), Kraus et al. (2012), Naldi et al. (2007) and Wiklund and Shepherd (2003). The dimensions included sales growth, profit growth, market share growth and return-on-equity growth. All dimensions were measured on a seven-point Likert scale ranging from 1 (strongly disagree) to 7 (strongly agree).

Three models were estimated in the study: a first model with absorptive capacity as the sole predictor of performance, a second model with innovation capability as the sole predictor, and a third model incorporating both capabilities simultaneously. Internal reliability, convergent validity, discriminant validity, collinearity and the significance of the coefficients were assessed using bootstrapping.

Results

The results show that the measurement model presents an adequate goodness of fit. Absorptive capacity reports a Cronbach's alpha of 0.934, composite reliability of 0.943 and an AVE of 0.543. Innovation capability reports a Cronbach's alpha of 0.956, composite reliability of 0.963 and an AVE of 0.743. The performance construct reports an alpha of 0.871, composite reliability of 0.922 and an AVE of 0.798. Discriminant validity is also adequate according to the Fornell-Larcker and HTMT criteria.

In the structural model, absorptive capacity has a positive and significant effect on performance (= 0.654; p < 0.001) and explains 42.8% of its variance. Innovation capability also has a positive and significant effect (= 0.536; p < 0.001), explaining 28.7% of the variance. When both capabilities are introduced jointly, absorptive capacity retains a stronger effect (= 0.520; p < 0.001), while innovation capability also remains significant (= 0.223; p = 0.006). The joint model explains 46.0% of the variance in performance.

Discussion

The results suggest that both capabilities are relevant to performance, but that absorptive capacity plays a more decisive role. In the context of agri-food cooperatives, internal innovation alone is not sufficient; it is particularly important to identify, assimilate and transform external knowledge from members, customers, inter-cooperative networks, public institutions, universities and technology centres. Innovation appears to contribute to performance, although part of its effect may depend on the organisation's prior ability to absorb useful knowledge.

Contributions and Implications

This study contributes to the literature on cooperative management by linking dynamic capabilities theory with the measurement of performance in agri-food cooperatives. From a practical perspective, the results suggest that management teams and governing bodies should strengthen mechanisms for external learning, collaboration, training, technology scouting and inter-cooperation. Likewise, public policies that support cooperatives could prioritize programs that strengthen knowledge. absorption and its translation into innovations oriented towards the market, members and sustainability.

Keywords: Agri-food cooperatives; absorptive capacity; innovation capability; performance; PLS-SEM

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Agri-Food Cooperatives and Fair Digitalization: Evidence from 18 Living Labs in Europe

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Abstract

Digital technologies are changing how farms plan production, use inputs, document activity, and coordinate with buyers and other service providers. Sensors, farm-management software, decision-support systems, digital platforms, and traceability tools may improve efficiency, precision, timeliness, and environmental performance. Their use also depends on access to connectivity, skills, finance, advice, and systems that can exchange data. Researchers have therefore emphasized that digital farming raises questions about uneven participation, socio-ethical risks, and the control of agricultural data, alongside questions about technical performance (Bronson, 2019; Eastwood et al., 2019; Wiseman et al., 2019). Recent European evidence on stakeholder perceptions of digitalization's costs and benefits provides a basis for examining these institutional questions through a cooperative lens (Iliopoulos et al., 2025). These questions matter to agri-food cooperatives because cooperatives can organize services and collective action for farmers, while their own governance arrangements shape whose interests digital systems serve.

This paper examines how stakeholders in European agriculture understand the benefits and costs of farm digitalization and what their accounts imply for the role of agri-food cooperatives. It asks which benefits and barriers recur across Living Labs, how concerns about data ownership, control, and benefit-sharing influence trust, and how cooperatives might help farmers access and govern digital technologies on fairer terms. The paper treats fairness as an institutional question: who can participate, who sets conditions for use, who bears costs and risks, and who can influence how value generated from data and digital services is distributed. It does not assume that cooperative involvement will automatically resolve these questions.

The analysis draws on qualitative material from 18 focus groups conducted in 18 Living Labs across 18 European countries within the CODECS project. Participants included farmers, advisers, researchers, policymakers, and, in some Living Labs, technology providers. The focus-group material was translated and examined through thematic coding. Intercoder calibration and cross-checking supported consistency in the analysis, while feedback from Living Lab coordinators provided a further validation step. The paper interprets the reported themes through cooperative research, with attention to member services, collective organization, ownership, control, and benefit-sharing. The material captures stakeholder perceptions and experiences; it is not designed to estimate the prevalence of particular views among all European farmers or to measure the causal effects of cooperative interventions.

Participants described a range of potential benefits. Digital tools were associated with more efficient farm operations, more precise and timely decisions, better planning, reduced or more targeted input use, and stronger traceability. In some contexts, participants also connected digital systems with improved coordination along value chains. Digitalization could contribute to a modern image of farming and appear attractive to younger people entering the sector. These accounts indicate that stakeholders see value in digital tools when they help solve practical production and coordination problems. The perceived benefits, however, were not presented as automatic outcomes of installing technology: they depend on fit with farm practices, access to support, and the ability to use information in decisions.

The focus groups also identified barriers that can restrict access to those benefits. Participants pointed to the initial investment and continuing maintenance costs of equipment and services, steep learning requirements, weak interoperability among systems, gaps in connectivity, and insufficient advisory support. Small and medium-sized farms were viewed as particularly exposed because they may have fewer financial and staff resources to assess technologies, adapt routines, or absorb the risks of experimentation. These concerns link digital exclusion to the distribution of organizational and technical capacity, rather than to farmers' willingness alone. If tools are expensive, difficult to combine, or poorly supported, the costs of adoption may outweigh their practical usefulness for some farms.

Questions of governance formed a second central pattern. Participants raised concerns about who owns farm data, who controls platforms and algorithms, how transparent contracts are, who carries the risks of digital dependence, and who captures the value created by data-driven services. Opaque terms, proprietary systems, hidden costs, and dependence on technology providers were described as sources of uncertainty. These concerns matter because data and platforms can influence decisions and relationships across the value chain. Stakeholders feared that value and decision-making power could move away from farmers toward upstream firms or actors with greater capital and technical capacity. From a cooperative perspective, these are questions of bargaining power and member control as well as data management.

The accounts further suggest that institutional context affects how stakeholders approach collective digital solutions. In Living Labs where cooperative traditions and advisory infrastructures were described as stronger, participants appeared more receptive to shared data platforms, farmer-led governance arrangements, and collective digital services. This cross-context pattern is suggestive rather than causal: the qualitative design does not isolate the effect of cooperative traditions from other differences among settings. It nevertheless points to the importance of the organizations and support systems surrounding technology adoption. Digitalization is shaped by more than the performance of a tool; it is also shaped by the rules, services, relationships, and capabilities that determine how the tool is introduced and used.

Taken together, the findings support understanding farm digitalization as a cooperative governance issue as well as a technology-adoption issue. Cooperatives may be able to pool investment, organize training and peer learning, provide trusted advisory support, coordinate procurement, negotiate contractual conditions, and develop or steward shared data infrastructures. These activities could reduce some of the costs and information gaps that individual farmers face and could give farmers a stronger collective voice in negotiations with technology providers. They also extend familiar cooperative functions: organizing services around member needs, addressing asymmetries in exchange, and enabling collective responses to problems that are difficult to solve individually. The evidence identifies these as plausible roles and opportunities, not as effects already demonstrated by the focus groups.

The paper contributes to cooperative studies by connecting empirical accounts of farm digitalization with questions of ownership, control, member value, and distribution. It positions agri-food cooperatives as potential digital governance actors, not only as users or purchasers of technology, and identifies practical domains for cooperative action, including training, advisory services, collective procurement, platform negotiation, and data stewardship. For cooperative managers, the implications are to assess members' needs and capabilities, build relevant technical and governance capacity, and make participation and data-use rules transparent. For policymakers, the findings support attention to public-interest and cooperative digital infrastructures, fair contractual conditions, interoperability, connectivity, and targeted assistance for smaller farms and digitally disadvantaged regions. Any such support should preserve farmers' ability to understand and influence how their data are used. Further research can compare cooperative initiatives and examine under what governance conditions they improve access, autonomy, and benefit-sharing. In line with research on digital farming's uneven engagements and socio-ethical challenges (Bronson, 2019; Eastwood et al., 2019; Prause et al., 2021), the central evaluative question is not only whether digital tools raise productivity, but also whether the institutional arrangements around them enable farmers to participate and share in the value they help create.

Keywords: Agri-food cooperatives; farm digitalization; data governance; member services; benefit-sharing

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From Collective Ownership to Stakeholding Governance: Adaptive Governance in Agricultural Cooperatives

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Abstract

Agricultural cooperatives are formed to coordinate transactions among users who jointly own an enterprise. Collective ownership can align control and benefits with member use, but the costs of organizing and governing a cooperative do not remain constant as the organization develops. Growth, diversification, mergers, and increased member heterogeneity can make coordination more demanding and can raise questions about whose needs receive attention, how information moves, and how decisions gain legitimacy. Institutional and cooperative theories explain the rationale for collective ownership and identify governance challenges over the cooperative life cycle, yet they offer less guidance on when structured participation by non-owner stakeholders can help preserve the efficiency and user orientation of a mature cooperative.

This paper develops an institutional-economic account of cooperative adaptation under rising organizational costs. It asks when and why an agricultural cooperative might move from undifferentiated member governance toward what the paper calls stakeholding governance: rule-bound participation by materially interdependent stakeholders who do not hold residual income rights in the cooperative. It also asks how such arrangements may respond to contemporary demands for coordination, accountability, and legitimacy while retaining a member-based ownership core. The analysis distinguishes participation and influence rights from residual ownership rights; extending a voice in specified decisions does not, by itself, transfer claims on residual income or make the cooperative investor-owned.

The paper uses theoretical synthesis and comparative institutional analysis rather than a statistical or causal research design. It brings together Hansmann's ownership-cost framework, Cook's life-cycle account of cooperative development, the distinction between formation and maintenance organizational costs developed by Iliopoulos and Cook, and Mintzberg's analysis of influence within and around organizations. The frameworks are used to identify how member heterogeneity and organizational complexity can increase governance costs, and how formal participation rules may alter information, coordination, and legitimacy (Hansmann, 1996; Cook, 1995, 2018; Iliopoulos & Cook, 2023; Mintzberg, 1983). European institutional examples—including federated structures, dual-class arrangements, stakeholder councils, social and solidarity cooperative forms such as SCICs, and platform-based food networks—serve to illustrate possible arrangements. They are comparative illustrations, not a matched sample from which the paper claims measured performance effects.

The analysis suggests that stakeholding governance becomes a plausible adaptive response when the costs of structuring stakeholder participation are lower than the coordination and legitimacy burdens of feasible member-only alternatives. This condition is more likely to arise where the cooperative's activities depend on sustained relationships with actors who are not members, where knowledge is distributed across groups, or where decisions affect parties whose cooperation is important to the enterprise. Scale, diversification, mergers, and sustainability-related pressures can intensify such interdependence. Under these conditions, advisory councils, outside directors, differentiated participation rights, and other formal arrangements may improve access to information, make conflicts more visible, and strengthen the

perceived legitimacy of decisions. These mechanisms do not guarantee agreement or efficiency; they create channels through which interdependent interests can be represented and negotiated.

The paper's comparative typology identifies a range of governance pathways. At one end, integrated member ownership and control links ownership, use, and decision rights closely, while newer cooperative models illustrate variation in ownership and control rights (Chaddad & Cook, 2004). As organizations become more complex, representative governance can delegate decisions while preserving member accountability. Capital-differentiated member ownership can adjust members' financial participation without necessarily abandoning cooperative control. Formal stakeholding governance adds defined roles for non-owner stakeholders while retaining members' residual claims. At the other end, investor-oriented governance gives greater weight to external capital and may weaken the link between user-membership and control. The typology is not a linear maturity scale or a normative ranking. It distinguishes institutional responses that distribute control and participation differently, and helps clarify what is altered and what remains member-based in each arrangement.

The central discussion is therefore about the conditions and safeguards under which wider participation can support cooperative purpose. Stakeholding should not be treated as an ideal governance model for every cooperative, nor as evidence by itself of departure from cooperative identity. Its relevance depends on the cooperative's ownership rules, the material interdependence of the parties, the scope of stakeholder voice, and the accountability of those who exercise influence. Formal participation can help address information gaps and representation problems, but it can also create new costs, blur lines of responsibility, or privilege well-resourced stakeholders. A cooperative that adopts such arrangements must define which decisions are open to stakeholder input, how representatives are selected, how members retain ultimate accountability, and how conflicts of interest are handled. These design questions determine whether additional participation complements or displaces member governance.

The paper contributes to cooperative theory in three ways. First, it conceptualizes stakeholding as a coordination mechanism that can complement markets and ownership when parties are materially interdependent. Second, it extends life-cycle and organizational-cost approaches by explaining how participation rights may be reallocated in response to governance strain without necessarily reallocating residual income rights. Third, it offers a comparative typology and propositions that can guide empirical research on cooperative governance redesign. The argument implies that organizational adaptation should be evaluated through total organizational costs, including the costs of coordination, participation, information, and legitimacy, rather than through financial performance alone. For practitioners, the framework offers questions for assessing whether a proposed council, board role, or participation arrangement addresses a specific governance problem and preserves clear member accountability. For policymakers, it suggests that legal and support frameworks should allow cooperatives to experiment with accountable forms of participation while making ownership, control, and income rights transparent.

The argument remains conceptual and should be tested against cooperative cases over time. Comparative research could examine whether stakeholder participation reduces governance burdens, which groups gain effective voice, and how these outcomes vary across legal forms and sectors. It could also distinguish formal participation from informal influence and examine whether arrangements change as the cooperative's scale and interdependencies evolve. By making these conditions explicit, the paper treats stakeholding governance as a possible efficiency-preserving adaptation to organizational change while keeping the cooperative's member-oriented character an empirical and institutional question (Valentinov, 2007).

Keywords: Stakeholding governance; agricultural cooperatives; organizational costs; member heterogeneity; cooperative adaptation

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Has Digitalization Drained Cooperative Marketing? A Seven-Channel Decomposition for Korean Farm Households, 2010–2020

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Abstract

Background

Digitalization is widely expected to erode the marketing role of agricultural cooperatives: as ICT lowers the cost of reaching alternative outlets, members can keep their membership while redirecting their sales. Evidence remains limited, because most studies are cross-sectional surveys that model a small subset of outlets (e.g., Zhang et al., 2025), so the channels that gain when the cooperative loses are never observed. Korea is a telling case, because there patronage, not affiliation, is the informative margin: memberships outnumber farm households, and affiliation does not predict selling to the cooperative itself (Hao et al., 2018). Between 2010 and 2020 the cooperative remained the primary outlet for a steady 31–32 percent of farm households, while direct-to-consumer sales rose from 19.9 to 26.6 percent and ICT utilization rose 44 percent. The strategic question is therefore not only whether digitalization drains cooperative marketing, but which channels gain around it. Three frameworks divide the explanatory work. Transaction-cost economics (Williamson, 1985) predicts which channels cheaper information favors; collective action (Olson, 1965) explains why organized, crop-anchored patronage resists that pull; and the cooperative's role as a value-chain coordinator determines whether outlets it runs, such as auction markets, capture what its core channel loses.

Methods

We examine how ICT utilization, crop structure, and producer organization participation relate to cooperative channel use and map the reallocation across all seven marketing channels. Following Deaton (1985) and Verbeek and Nijman (1992), we build a synthetic panel of 1,538 district–age cohorts (162 districts × ten age bands; 4,614 cohort-year observations) from three full enumerations of Korean farm households in the Census of Agriculture, Forestry and Fisheries (2010, 2015, 2020). The outcomes are the shares of households naming each outlet as their primary channel; because the shares are exhaustive, the seven channel coefficients sum to zero, giving a closed accounting decomposition of conditional associations. Because cohorts are age bands, within-cohort change mixes behavioral change with generational turnover, which a birth-cohort panel partly separates. Cohort fixed-effects estimates, with district-clustered errors, are checked against finer fixed effects, a birth-cohort panel, alternative weights, denominators, and functional forms, and a household-level re-estimation (N = 3.3 million); the aim is not to identify causal effects but to ask whether the associations survive increasingly demanding controls.

Results

Through 2020, and on the primary-outlet margin (partial side-selling within a household is invisible to the census), we find little sign that digitalization has drained the cooperative channel; rising ICT use has instead accompanied a re-sorting around it. Three findings stand out. First, rising ICT use goes with market entry and above all with direct-to-consumer sales (β=+0.086, $p<0.001$), a gain carried by information search that halves once age-band trends and district shocks are absorbed together, so technology and generational change cannot be separated. Its association with the cooperative is small and statistically fragile (β=−0.027, not significant under district clustering): at the decade's pace of diffusion it implies a loss of about one percentage point at most, concentrated in vegetable and other-crop cohorts. Second, crop structure, not

digital capability, is the strongest sorting variable: rice anchors households in the cooperative and public procurement channels, and in the aggregate the shrinking rice base subtracts 2.2 points from the cooperative share against 0.3 for ICT. Third, part of the re-sorting may stay inside the cooperative system: local auction markets, mostly cooperative-run, also gain (β=+0.033), so the combined cooperative and auction share shows no net ICT association in the baseline, although that gain rests on differences between districts. Regional contrasts, including one in producer organization participation, remain suggestive.

Contributions and Implications

Empirically, the study shows that through 2020 digitalization accompanied a re-sorting around cooperative marketing, with little sign of a drain on it; for cooperative economics, it measures patronage on the margin that varies in Korea; and methodologically, it brings a census-scale synthetic panel and a seven-channel accounting decomposition to cooperative channel choice, a design portable to any census that records one primary outlet from an exhaustive menu. Read as interpretation rather than measurement, technology, rather than the constitutional reform Svendsen (2007) envisaged, may be re-arming the member's outside option, so retention must now be earned rather than assumed from membership. Because the outflow concentrates among vegetable and other-crop growers and cannot be separated from generational change, shared progress means extending cooperative marketing to the members who are moving, not only retaining those who stay. For cooperative strategy, the implication is differentiated rather than uniform: digital marketing services within cooperatives for vegetable and other-crop growers, where the outflow appears; hybrid coordination through the auction markets cooperatives already run; and differentiated payment and branding for rice before its base erodes further. Our regional contrasts are too weak to support region-specific service models. Among the key references, Deaton (1985) and Verbeek and Nijman (1992) establish the synthetic-panel method, and Olson (1965) and Williamson (1985) supply the collective-action and transaction-cost frameworks.

Keywords: agricultural cooperatives; cooperative patronage; marketing channel choice; digitalization; synthetic panel

Theme(s): Agri-Food Cooperatives; Technology, Digitalization, and Platform Cooperatives

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Cooperative Members' Willingness to Invest in Sustainable Production Systems

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Abstract

Cooperative members are, in most cases, Small and Medium-sized enterprises (SMEs) that seek to enhance their innovation, gain market access, and increase their bargaining power through participation in cooperative business ventures. Research has shown that SMEs can respond quickly to changes in the market environment due to their size and flexible governance structures (Verhees et al., 2010). Unlike large corporations, SMEs are more easily inclined to switch to and/or invest in sustainable production systems (SPSs). Such systems entail the creation of goods and services through processes and systems that eliminate waste and pollution, conserve energy and natural resources, promote economic viability, ensure safe and healthy working conditions for workers, communities, and consumers, and achieve social and creative benefits for all working people. SPSs have become a new norm in business in response to the increasing consumer, societal, and governmental concerns (Kotler, 2011; Crittenden et al., 2011). Nowadays, an increasing number of SMEs worldwide, including farmers, are raising their incomes through premiums generated by the sale of differentiated (e.g., sustainable) food products and alternative energy-based accommodation services. On the one hand, SMEs may differentiate their products (e.g., by using sustainable, reused, or recycled materials; eliminating waste and pollution; and using alternative energy sources in their production processes). Hence, they aim to respond to the increasing demand for healthy/sustainable food. Since the 1990s, there has been improved access for the agri-food sector to remunerative, sustainable markets worldwide. On the other hand, while many SMEs are leading in implementing sustainable and circular practices, many others lack a long-term strategic mindset and relevant information about transitioning to SPSs (Condon, 2004). Despite policy initiatives aimed at professionalising market-oriented, sustainable, and circular chains, Dutch agri-food firms (e.g., food cooperatives) have substantial concerns about potential losses of either market share or competitive position if they pursue a differentiated (sustainable) production line. That is, such strategic decisions have a substantial impact on their established branding and positioning, are largely irreversible, and entail high risk (Pennings and Garcia, 2010). A key question is what drives SMEs' willingness to switch to or invest in SPSs. While the existing literature has focused on explaining how SMEs' characteristics and societal benefits influence the propensity to adopt sustainable practices, little attention has been paid to the underlying factors that drive SMEs' risk behaviour, such as cooperative members' willingness to switch to or invest in SPSs. This paper examines the impact of cooperative members' risk perceptions, risk attitudes, market orientation, level of understanding, and characteristics on their willingness to switch to or invest in SPSs. To the best of our knowledge, this is the first empirical study to examine the impact of several latent factors on cooperative members' strategic decision-making regarding the adoption of SPSs. Recognising the

dilemma cooperative members face in making such a strategic decision (to opt for an SPS) because they may be confronted with unexpected market constraints and uncertainty regarding their investment outputs (Kalogeras et al., 2012; 2022), we hypothesise that several latent (unobservable) factors drive their willingness to switch to or invest in SPSs (Trujillo-Barrera et al., 2016). Using measurement scales based on the psychometric literature, we empirically examine the impact of factors on cooperative members' willingness to switch to/invest in SPSs. With data from 57 in-depth interviews and 215 with cooperative members in agrifood markets (horticultural and dairy), in the Netherlands, we find that the risk perception of cooperative members has a negative impact on their decision to switch to/invest in SPSs, while innovativeness, market-orientation, education, age, and turnover of SMEs increase the likelihood of switching to/investing in SPSs. Yet, the importance and magnitude of these factors' impact differ among product markets. Members engaged in horticulture seem more prone to take risks and engage in SPSs than members of dairy cooperatives. These sectoral differences suggest that a one-size-fits-all approach to promoting SPSs is unlikely to be effective; instead, interventions should be tailored to the specific risk profile, market conditions, and investment horizon of each product market. Understanding the latent factors that play a crucial role in members' willingness to switch to or invest in SPSs may yield insights for agri-food cooperative policy-makers and industry managers seeking to increase the likelihood that farmers (cooperative members) will switch to SPSs. Hence, more informed decisions can be made regarding the design of policies and strategies to increase the adoption of SPSs. For example, our results indicate that members' risk perception appears to be a barrier to the adoption of SPSs. This barrier may be removed when members receive education and training on how to evaluate, manage and mitigate potential risks when they may opt to change their production practices. In addition, governmental agencies, public policy initiatives, and credit institutions may facilitate cooperative members (SMEs) by providing them with a minimum return (e.g., tax allowances) on their investment in SPSs during a specific time window, thereby temporarily reducing their risk-adjusted cost of capital and making the switch to SPSs more affordable.

Keywords: Members; Willingness; Sustainable Production

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Agri-food cooperatives, behavioral factors and sustainable practice adoption under climate change

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Abstract

Background

Mediterranean agriculture is increasingly exposed to the effects of climate change, particularly in regions characterized by water scarcity, soil degradation and strong pressure on natural resources (Claro et al., 2024; Harmanny et al., 2019). The intensification of agricultural production systems, together with growing environmental constraints and market demands, has reinforced the need to promote sustainable farming practices capable of improving resilience and ensuring the long-term viability of agricultural systems (Çakmakçi et al., 2025). In this context, practices such as regulated deficit irrigation, crop diversification, organic fertilization and biological pest control have gained relevance as strategies for climate change mitigation and adaptation (Benitez-Alfonso et al., 2023; Biswas & Das, 2024). These practices include water-saving measures, soil and nutrient management practices, biodiversity-oriented techniques and climate adaptation strategies linked to resource efficiency and environmental conservation. Nevertheless, despite their recognized environmental benefits, adoption rates among farmers remain heterogeneous and often limited (Autio et al., 2021; Negera et al., 2022).

Existing literature has traditionally explained adoption decisions through structural and economic determinants, such as farm size, investment capacity, access to technology and institutional support. However, recent studies increasingly highlight the importance of behavioral dimensions, including environmental attitudes, perceptions of risk and uncertainty, trust in institutions and subjective evaluations of costs and benefits (Gemtou et al., 2024; Serebrennikov et al., 2020). These aspects are particularly relevant in Mediterranean agriculture, where uncertainty regarding water availability and climate conditions increases farmers' risk aversion and affects their willingness to innovate (Timpanaro et al., 2023). Within this framework, agri-food cooperatives emerge as potentially important actors in facilitating sustainability transitions. Beyond their economic and commercial functions, cooperatives provide technical advice, training, information exchange and collective learning environments that may reduce barriers to adoption and shape farmers' perceptions regarding sustainable innovations (Chen et al., 2025; Slimi et al., 2021).

Aims

This study analyzes the role of agri-food cooperatives in promoting sustainable agricultural practices from a behavioral perspective. More specifically, it evaluates farmers' willingness to adopt climate change mitigation and adaptation practices, examines the perceived costs associated with their implementation, and explores how cooperative membership influences decision-making processes. The analysis seeks to determine whether cooperatives directly foster sustainable behavior or whether their influence operates indirectly through the reduction of informational asymmetries, improved technical support and changes in farmers' perceptions of risks and costs.

Methods

The study is based on face-to-face surveys conducted with 240 farmers in the Region of Murcia, Spain, one of the Mediterranean regions most affected by water scarcity and environmental stress. The sample mainly includes farmers involved in irrigated horticultural, fruit and citrus production systems, which are highly exposed to climate-related risks and strongly dependent on irrigation infrastructure. Both cooperative members and non-members were included, allowing comparative analysis between groups. Farmers were asked about their willingness to adopt seven sustainable agricultural practices associated with climate change adaptation and mitigation. In addition, perceived implementation costs were estimated through the contingent valuation method using willingness-to-accept measures. Several of the analyzed practices are partially supported through agri-environmental schemes and CAP eco-schemes, which may reduce adoption costs and shape farmers' incentives. However, farmers' perceptions regarding complexity, uncertainty and implementation requirements remain highly relevant in adoption decisions.

Results

The results reveal an overall positive disposition toward sustainable agricultural practices among farmers in the Region of Murcia. Certain practices, particularly regulated deficit irrigation and organic fertilization, present adoption willingness rates above 90%, reflecting growing awareness regarding environmental sustainability and water management challenges. However, cooperative membership does not exert a direct and homogeneous effect on adoption decisions. Instead, cooperatives appear to influence farmers indirectly by improving access to technical information, advisory services and training opportunities.

From a behavioral perspective, the findings show that farmers' decisions are influenced more strongly by perceived implementation costs than by actual economic costs, suggesting the presence of cognitive biases and significant levels of uncertainty aversion. In several cases, cooperative members report more conservative perceptions regarding the costs of adopting sustainable practices, possibly due to greater awareness of technical requirements and implementation complexities derived from their closer exposure to advisory services and technical information. At the same time, cooperative members display greater confidence in institutional support mechanisms and better access to practical knowledge that may facilitate implementation processes over time.

Discussion

The findings confirm that the adoption of sustainable agricultural practices cannot be fully explained by economic or structural variables alone. Behavioral dimensions play a crucial role in shaping farmers' decisions, particularly in contexts characterized by uncertainty and environmental vulnerability. The results suggest that cooperatives do not simply provide technical support but actively shape the institutional and social context in which farmers interpret sustainability-related decisions. Through collective norms, peer interaction, advisory systems and market coordination, cooperatives influence how risks, costs and environmental responsibilities are perceived. Moreover, cooperatives should not be interpreted solely as transmission mechanisms for environmental policies. They also act as collective organizations that represent farmers' interests, mediate between regulatory requirements and economic viability, and negotiate sustainability transitions under real market constraints.

Contributions and Implications

This study contributes to literature by integrating a behavioral economics perspective into the analysis of cooperative-driven sustainability in agriculture. Policy implications suggest that financial incentives alone may be insufficient to accelerate the adoption of sustainable practices. Instead, sustainability policies should combine economic support with behavioral-oriented interventions, including demonstration projects, peer-learning initiatives, clearer communication of real implementation costs and advisory services designed to reduce uncertainty and correct misperceptions. Future cooperative strategies could further strengthen sustainability transitions through participatory advisory models, demonstration farms, digital decision-support systems and stronger collaboration with public institutions. Expanding

cooperatives' role as trusted intermediaries between farmers, markets and environmental policies may become increasingly important under future climate uncertainty.

Keywords: Agri-food cooperatives; behavioral economics; sustainable agriculture; climate change; adoption decisions

Theme(s): Environmental and Social Sustainability in Cooperatives; Agri-Food Cooperatives

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Behavioral Biases in Cooperative Decision-Making: Evidence from Swedish Agricultural Cooperatives

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Abstract

Background

Decision-making in organizations has traditionally been analyzed through the lens of rational choice theory (Green and Shapiro,1994), which assumes that decision-makers select optimal alternatives based on complete information. However, research in behavioral economics and organizational decision-making has shown that individuals frequently rely on heuristics that may lead to systematic cognitive biases. The work of Kahneman & Tversky (1979) demonstrated that biases such as anchoring, loss aversion, and overconfidence can influence decision-making processes in both individuals and organizations. While these behavioral dynamics have been widely studied in investor-owned firms, much less attention has been given to cooperative organizations. Agricultural cooperatives represent a distinct governance form characterized by democratic member control, collective ownership, and long-term strategic orientation. These characteristics may shape how decision-makers interpret information, evaluate risks, and implement strategic decisions. Understanding how behavioral biases interact with cooperative governance structures is therefore essential for explaining decision-making processes within agricultural cooperatives.

Aims

This study aims to explore how behavioral biases influence decision-making processes in agricultural cooperatives. The research question guiding this study is “How do behavioral biases affect strategic decision-making processes in agricultural cooperatives?” We focus on Swedish agricultural cooperatives how behavioral barriers differ between members and managers across various types of agricultural cooperatives. Using a mixed-methods approach, combining qualitative interview data and quantitative cross-sectional survey data from Swedish agricultural cooperatives, the study examines how managers and members perceive decision-making processes and the extent to which behavioral biases influence these processes.

Methods

This study adopts a mixed-methods research design combining qualitative interviews with a cross-sectional survey. The qualitative component is based on semi-structured interviews with managers and board representatives of Swedish agricultural cooperatives. The interview guide was developed using the decision-quality checklist proposed by Kahneman et al., 2011, which identifies common cognitive biases affecting organizational decisions. Interviews explored two main dimensions: decision-making styles and behavioral biases. The empirical cases include integrated and non-integrated cooperatives. Interview transcripts were analyzed using thematic analysis based on deductive coding (Fife and Gossner, 2024).

The quantitative component employs a cross-sectional survey to investigate behavioral factors focused on decision-making related to cooperative vertical integration among Swedish farmers. The behavioral propositions and survey measures were primarily informed by prospect theory and related behavioral-decision literature. The behavioral part of the survey includes cognitive biases and personality traits. Most behavioral measures were asked using five-point Likert scale from (1) strongly disagree to (5) strongly

agree. In addition, the survey included scenario-based behavioral elicitation tasks and hypothetical decision-making situations designed to capture behavioral responses under uncertainty.

Results

The findings reveal notable differences between integrated and non-integrated cooperatives in both decision-making styles and the prevalence of behavioral biases. The interview results showed that non-integrated cooperatives rely more heavily on experience-based decision-making and member participation, even when formal decision procedures are in place. In contrast, integrated cooperatives demonstrate more professionalized and data-driven decision-making processes.

Several behavioral biases were identified in the interviews. Anchoring bias was observed in both cooperative types, as managers frequently relied on past financial performance and previous investments when evaluating new decisions. Loss aversion appeared particularly strong in non-integrated cooperatives, where decision-makers displayed significant caution toward risky investments. Sunk-cost bias was observed only slightly across the cases, indicating that cooperatives generally reassess investments based on current economic conditions. Self-interest bias was not observed in the non-integrated cooperative but appeared slightly in integrated cooperatives, potentially reflecting more complex organizational structures. Overall, the results suggest that cooperative governance mechanisms mitigate some biases while allowing others to persist in strategic decision-making.

The survey, based on responses from 1,135 Swedish farmers, findings showed that cognitive biases are more strongly associated with cooperative integration than are personality traits. Members of integrated cooperatives differed from those of non-integrated cooperatives, particularly in status quo bias, anchoring behavior, and sunk-cost-related decision-making.

Discussion

The findings indicate that cooperative governance structures play an important role in shaping decision-making processes and moderating behavioral biases. Democratic governance and collective oversight appear to reduce opportunistic behavior and self-interest bias. However, experience-based heuristics remain common in cooperative management, particularly in investment planning and financial decision-making. Anchoring and loss aversion appear to be the most influential biases affecting cooperative leaders. These findings suggest that while cooperative governance structures mitigate certain behavioral distortions, they do not eliminate cognitive biases entirely. Overall, the findings suggest that behavioural factors provide an important complement to traditional economic explanations of cooperative development.

Contributions and Implications

This study contributes to the literature in three ways. First, it extends behavioral decision theory to the context of cooperative organizations, which have received limited attention in previous research. Second, it demonstrates that cooperative governance structures can moderate certain behavioral biases in organizational decision-making. Third, it highlights structural differences between integrated and non-integrated cooperatives in terms of decision-making styles and risk perception. From a practical perspective, the findings suggest that cooperative leaders may benefit from decision-support mechanisms that help identify and mitigate behavioral biases in strategic investment decisions.

Keywords: behavioral biases; cooperative governance; decision-making; agricultural cooperatives; behavioral strategy

Theme(s): Cooperative Governance and Management; Agri-Food Cooperatives

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The Impact of Women's Cooperatives on Women's Economic and Social Well-being: A Case of Samsun Province, Türkiye

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Abstract

According to World Bank data, although progress has been made in increasing women's labor force participation and reducing gender inequalities, participation rates in developing countries remain significantly lower than in developed economies. It is noted that women worldwide still do not enjoy the full range of rights currently held by men, that the labor force participation rate stands at 53% for women compared to 80% for men, and that gender inequality in the labor market remains a major issue. However, while women's labor force participation and employment are of great importance for sustainable economic growth and balanced social development, for a country to be considered a developed nation, women's labor force participation and employment rates must be on par with those of men. Indeed, according to 2023 data, while the female employment rate stands at 64.1% in Organisation for Economic Co-operation and Development (OECD) countries and 70.2% in European Union (EU) countries, this rate is 31.7% in Türkiye. Furthermore, according to an OECD report, Türkiye has the highest gender gap in labor force participation in Europe. Cooperatives contribute to improving the quality of life for communities in many countries around the world. Especially in developed countries, social and economic development is based on organization. Women's cooperatives are regarded as one of the key policy tools for increasing women's participation in economic and social life, contributing to economic growth, combating threats such as poverty, and empowering women. Women's cooperatives, established and operated by women, bring together women entrepreneurs with limited capital, provide employment opportunities for women who cannot market their labor individually, and thus contribute to regional development. Additionally, they are organizations that fulfill economic and social functions for their members, generate income and employment through economic activities, encourage women's participation in economic and social life, and create opportunities for the exchange of knowledge and experience at both national and global levels. The purpose of this study is to determine the changes brought about by women's cooperatives in terms of women's economic and social well-being, as well as the factors influencing these changes. The data for the study consists of face-to-face surveys conducted with 64 women's cooperative members selected via simple random sampling from among the members of women's cooperatives operating in Samsun Province. In the study, the score reflecting the changes brought about by women's cooperatives in women's economic and social well-being was derived from 31 questions. The factors influencing these changes were identified using an Ordinal Probit Model. According to the research findings, female cooperative members were divided into three groups based on their well-being scores: low (17.18%), medium (64.06%), and high (18.76%) increases in well-being. The study found that women's cooperatives have a significantly greater impact on women's social well-being (0.542) than on their economic well-being (0.242). It was observed that women's cooperatives help women gain self-confidence, improve their social relationships, and participate more actively in social life. In the area of economic well-being, higher increases were observed in criteria such as product marketing capability, employment status, access to national and international support, and access to larger domestic and international markets. According to the results of the ordered probit model, the marital status, age, income obtained from the cooperative, and the distance of the cooperative from the provincial center were identified as variables that statistically positively influence economic and social well-being, while educational status, number of children, and duration of membership were identified as variables that statistically negatively influence economic and social well-being. In conclusion, while the model demonstrates that cooperatives are a strong source of well-being, particularly for women in rural areas, it also shows that education and family responsibilities

are factors that limit this benefit. The research findings indicate that women's cooperatives are an effective tool for women's empowerment. Therefore, public institutions and local governments should provide financial, technical, and institutional support to cooperatives; expanding cooperatives, particularly in rural areas, will enhance women's economic and social well-being.

Keywords: women; women's cooperatives; economic and social welfare; ordered probit model; Samsun; Türkiye
Theme(s): Agri-Food Cooperatives; Youth, Gender Equality, Diversity, and Inclusiveness in Cooperatives

Beyond Economics: Social, Strategic, Organizational and Governance Drivers of Generational Renewal in Spanish Agri-food Cooperatives

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Abstract

Background

Producer aging and the lack of generational renewal endanger rural territories and the agri-food sector's capacity to innovate. The CAP makes generational renewal a specific objective, with Member States setting an upper age limit of 35–40 years to qualify as a young farmer (Regulation (EU) 2021/2115). Cooperatives lower the costs and risks of entering farming and give young producers access to markets, services and investment, but their attractiveness depends on social inclusion, scale, integration and leadership. In literature, cooperative performance and governance are well studied (Bijman & Iliopoulos, 2014; Grashuis & Su, 2019), but the determinants of youth membership remain largely unexplored.

Aims

This study analyzes the determinants of generational renewal in Spanish agri-food cooperatives, exploring the interplay between social, strategic, organizational and governance dimensions.

Methods

We use an unbalanced panel of Spanish first-tier agri-food cooperatives (2016–2022). The dependent variable is the percentage of members under 40. Explanatory variables are social (women members); strategic (turnover, number of activities, organic and export shares, employment); organizational (PO, second-tier membership, SAT legal form); and governance (young board members, young president), plus sector dummies.

The initial sample for the static (fixed-effects) panel model comprises 2,782 first-tier cooperatives and SAT (Agricultural Processing Company), about 76% of the 3,669 agri-food cooperatives and SAT in Spain. Because data on the age of the President and Board members are only systematically available from 2018, the empirical strategy has two stages: (1) a fixed-effects model on the full 2016–2022 panel, excluding governance, identifies the structural (social, strategic and organizational) determinants; (2) a System-GMM model (Arellano & Bover, 1995; Blundell & Bond, 1998) on the 2018–2022 sub-panel adds the youth governance variables, addressing persistence and endogeneity to better identify the effect of young leadership.

Results

More than half of the cooperatives in the sample have no members under 40. In the leading quartile, young members average 19.9% of the membership, versus 1.6% in the rest; leaders are larger (€3.0 versus €1.5 million turnover), more diversified, more often Producer Organizations and more likely to have a young president (6.2% versus 2.4%).

Social dimension

Women's membership is the strongest, most stable predictor of generational renewal (coefficient 0.145, $p < 0.01$; Table 1, model 3): ten more points of female members go with 1.4 more points of young members.

Strategic dimension

Turnover shows a U-shaped relationship (linear term −0.0263, squared term 0.0012; $p < 0.01$; model 3) with a very low turning point (about €57,400), so almost all cooperatives lie on the rising branch. The marginal effects confirm this dynamic: whereas in small-scale cooperatives the impact of increasing

turnover on generational renewal is not significant, in large entities the marginal effect accelerates markedly. Specifically, the effect in large cooperatives (0.0193; $p < 0.01$) is twice that observed at intermediate scale (0.0089; $p < 0.01$), evidencing increasing returns to business scale in attracting young members. Diversification is positive and significant; export and organic shares are not.

Organizational dimension

PO recognition is associated with 8.2 more points of young members in independent cooperatives and 5.9 more points in those integrated into a second-tier cooperative ($p < 0.01$). Second-tier membership has no direct effect but acts as a moderator: it triples the marginal effect of diversification (0.0062 versus 0.0021; interaction 0.0042, $p < 0.01$) and weakens that of PO status (interaction −0.0230, $p < 0.01$). This suggests that second-tier structures provide the know-how and market access that make diversification effective and attractive to young members.

Governance dimension (dynamic model)

The dynamic model (Table 2) shows strong persistence in the share of young members (lagged coefficient 0.745, $p < 0.01$). Controlling for inertia and for the endogeneity of board composition, a young president is significantly associated with renewal (0.0266, $p < 0.01$; about 2.7 more points of young members); young board members are not. Women members (0.0423) and turnover (0.0026) remain significant ($p < 0.01$), while diversification and PO status lose significance, and export and organic shares remain non-significant.

Discussion

Renewal is highly persistent (about three quarters of the young-member share carries over each year), but three levers move it beyond this inertia.

First, leadership, the study's main contribution: once treated as endogenous, young board members lose significance, consistent with their being an outcome of a younger membership, whereas a young president pulls renewal. In line with signaling theory (Spence, 1973), a young president may act as a visible symbol that lowers entry barriers for new farmers.

Second, gender diversity, linked to youth in every specification: female membership goes hand in hand with generational renewal.

Third, scale and integration. Size is a precondition, with increasing returns. Second-tier integration is valuable instrumentally: its infrastructure makes diversification effective for local cooperatives and partly substitutes for PO status. Diversification losing significance in the dynamic model suggests a slow-building asset.

Contributions and Implications

Combining fixed-effects and System-GMM panel models, this study shows that youth membership is highly persistent and identifies what moves it beyond this inertia, distinguishing leadership that drives renewal (a young president) from leadership that reflects it (young board members). For policymakers, the results support promoting PO recognition, women's membership, young presidencies and second-tier integration, whose value is instrumental; CAP measures could reward cooperatives that open their presidency to young members. For managers, scale matters, diversification pays off within second-tier structures and over time, and renewing the presidency signals more than adding young board members.

Table 1. Fixed-effects regression results (full structural sample, 2016–2022)

Dimensions / Variables	(1) Linear	(2) Non-linear	(3) Interactions
SOCIAL DIMENSION			
Female members %	0.1467*** (7.00)	0.1463*** (6.99)	0.1447*** (6.93)
STRATEGIC DIMENSION			
Ln Turnover	0.0012 (0.62)	−0.0259*** (−3.45)	−0.0263*** (−3.47)
Ln Turnover²	—	0.0011*** (3.38)	0.0012*** (3.43)
Diversification	0.0047*** (6.31)	0.0047*** (6.22)	0.0021** (1.99)
Organic %	0.0261 (0.81)	0.0262 (0.82)	0.0208 (0.52)
Export %	0.0155 (0.95)	0.0142 (0.88)	0.0074 (0.40)

Employees (hundreds)	0.0101** (2.20)	0.0095** (2.07)	0.0093** (1.99)
ORGANIZATIONAL DIMENSION			
PO (Producer Organization)	0.0687*** (14.61)	0.0683*** (14.55)	0.0817*** (11.69)
Coop (member of 2nd-tier coop)	0.0007 (0.15)	0.0007 (0.14)	0.0300 (0.80)
SAT	0.0057 (0.13)	0.0067 (0.15)	0.0075 (0.17)
INTERACTIONS			
Coop × ln Turnover	—	—	−0.0035 (−1.31)
Coop × PO	—	—	−0.0230*** (−2.66)
Coop × Diversification	—	—	0.0042*** (3.64)
Coop × Organic %	—	—	0.0216 (0.57)
Coop × Export %	—	—	0.0133 (0.65)
Constant	−0.0079 (−0.27)	0.1484*** (3.28)	0.1507*** (3.41)
Sector controls	YES	YES	YES
Observations / Cooperatives	16,366 / 2,782	16,366 / 2,782	16,366 / 2,782
R^2 (within)	0.0637	0.0644	0.0673
F-test (Prob > F)	20.51 (0.000)	20.59 (0.000)	16.95 (0.000)
Hausman test (Prob > χ^2)	124.30 (0.000)	135.27 (0.000)	146.53 (0.000)

Note: Fixed-effects (within) estimates. Dependent variable: percentage of members under 40. t-statistics in parentheses, based on robust standard errors clustered at the cooperative level. *** p < 0.01; ** p < 0.05; * p < 0.1.

Table 2. Dynamic determinants of generational renewal: System-GMM (2018–2022)

Dimensions / Variables	System-GMM
INERTIA	
Young members % (t−1)	0.7452*** (0.0285)
SOCIAL DIMENSION	
Female members %	0.0423*** (0.0081)
GOVERNANCE AND LEADERSHIP	
Young president	0.0266*** (0.0082)
Young board members (endogenous)	0.0036 (0.0034)
STRATEGIC DIMENSION	
Ln Turnover	0.0026*** (0.0006)
Diversification	−0.0003 (0.0003)
Organic %	0.0015 (0.0064)
Export %	0.0058 (0.0053)
Employees (hundreds)	0.0003 (0.0013)
ORGANIZATIONAL DIMENSION	
PO (Producer Organization)	0.0011 (0.0032)
SAT	0.0046 (0.0049)
Coop (member of 2nd-tier coop)	−0.0009 (0.0018)
Sector and year controls	YES
Observations / Cooperatives	10,843 / 2,547
Instruments	26
AR(1) / AR(2) p-value	0.000 / 0.927
Sargan / Hansen p-value	0.273 / 0.366

Note: Two-step System-GMM with orthogonal deviations and collapsed instruments. Windmeijer-corrected robust standard errors in parentheses. The lagged dependent variable and young board members are treated as endogenous and instrumented with their lags. *** **p < 0.01; ** ** p < 0.05; * p < 0.1.

Keywords: Generational renewal; Agri-food cooperatives; Governance; Youth leadership; Gender diversity; Fixed effects; System-GMM; Rural sustainability

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Can agro-product certification improve economic performance of farmer cooperatives?

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Abstract

Background

Agricultural green production is fundamental to ensuring food security, advancing rural modernization, and improving livelihoods. It plays a critical role in addressing climate change and fostering sustainable development by integrating ecological and socio-economic objectives. In China, the agricultural sector has long relied on high-input and resource-intensive practices, with excessive use of fertilizers and pesticides posing risks to both the environment and product safety (Wang et al., 2020). In response, the Chinese government has implemented various policies to promote greener agricultural practices.

Agro-product certification has emerged as a key instrument for advancing sustainability in agriculture. Certified production strictly regulates chemical inputs, encourages the adoption of green technologies, and promotes the sustainable management of agricultural waste. Among the various certification schemes, green food and organic product certifications are the most widely adopted in China (Yin et al., 2017). By the end of 2021, the number of valid certificates for these two types reached 17,797 and 8,371, respectively.

Despite its significance, smallholder farmers often face barriers to obtaining certification due to limited financial resources, technical knowledge, and market access. Scholars highlight that smallholders typically rely on agricultural organizations—such as companies and cooperatives—to facilitate certification (Asfaw et al., 2010; Handschuch et al., 2013). Farmer cooperatives, in particular, play a vital role in enabling certification among smallholders (Jena et al., 2012; Li and Guo, 2019; Liang et al., 2020).

While existing research has extensively examined the determinants and outcomes of certification for individual farmers and firms (e.g., Handschuch et al., 2013; Tran and Goto, 2019; Brako et al., 2021; Liu et al., 2021; Dong and Liang, 2023), limited attention has been given to the role of cooperatives. Li and Zhao (2019) found that cooperatives' certification willingness is positively influenced by expected economic benefits and government support, with those in fruit, vegetable, and aquatic sectors showing greater interest. Snider et al. (2017) reported inconsistent economic returns from certification due to high management costs and difficulties in securing price premiums. Their study also highlighted the potential of Fairtrade certification in strengthening cooperative capacities. These findings underscore the need for further empirical investigation into the role of cooperatives in agro-product certification.

Aims and Methods

This study aims to identify the factors influencing the adoption of agro-product quality certification by farmer cooperatives in China and investigate the impact of certification on the economic performance of cooperatives, thereby contributing to achieving environmental sustainability and improving cooperatives' economic performance. To achieve this, research employs Propensity Score Matching (PSM) and Ordinary Least Squares (OLS) methods to analyze the causal relationship between certification and economic outcomes, using a comprehensive dataset comprising 180,281 farmer cooperatives.

Results

The results reveal that the adoption of product quality certification by farmer cooperatives is influenced by factors such as cooperatives' operational years, membership size, geographical location, and product

sectors. Product quality certification significantly enhances economic performance, measured by revenue, total profit, per capita revenue, and per capita profit. Green food certification shows stronger effects than organic certification, and the impacts vary across product sectors and cooperative characteristics. Positive effects of certification are also found to be time-bound, lasting for a limited number of years.

Contributions and Implications

By systematically assessing the heterogeneous and dynamic economic effects of agro-product certification on farmer cooperatives, this study bridges the gap in systematically assessing the heterogeneous and dynamic economic effects of agro-product certification on farmer cooperatives. The value of the research lies in that it offers scientific evidence for agricultural producers and policy makers to develop strategies of certification which is an essential part of sustainable agriculture.

Keywords: Agricultural Sustainable Development; Agro-product Certification; Farmer Cooperatives; Performance; Dynamic Effect

Theme(s): Environmental and Social Sustainability in Cooperatives; Agri-Food Cooperatives

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A descriptive analysis of Italian agricultural cooperatives. Micro-economic evidence from the FADN database

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Abstract

Background

Agricultural cooperatives have long represented an important organizational response to the structural fragmentation of agriculture, particularly where farms face limited bargaining power, difficulties in exploiting economies of scale, and the need to coordinate processing and marketing activities beyond the farm gate. In this perspective, the cooperative can be interpreted primarily as a coordination mechanism through which independent producers aggregate supply and jointly manage selected stages of the value chain. However, no organizational form is intrinsically more efficient in every context: the potential advantages of cooperation depend on sector-specific production conditions, the scale and organization of farms, the ability to coordinate product flows, and the incentives governing the relationship between farmers and cooperative organizations (Cook, 1995; Bijman et al., 2011). These issues are especially relevant in Italy, where farm structure remains highly fragmented and the development of agricultural cooperation differs markedly across sectors and territories (Licciardo & Fontanari, 2024). This calls for farm-level evidence that distinguishes between the incidence of cooperating farms, their productive weight and the share of their output actually marketed through cooperatives, while considering sectoral and territorial differences.

Aims

This study provides a descriptive farm-level comparison between agricultural holdings that cooperate and those that do not, using the Italian Farm Accountancy Data Network (FADN/RICA). It examines structural characteristics, territorial and sectoral heterogeneity, the concentration of agricultural production within the cooperative system, the share of product value marketed through cooperatives, and selected indicators of economic performance. Rather than estimating a causal cooperative effect, the analysis explores how these dimensions vary across farm structures, sectors and territories, and whether differences in economic performance are consistent across contexts.

Methods

The analysis covers 2017–2022. A farm observation is classified as “cooperating” in a given year when the farm reports membership in a cooperative for product delivery, use of services or technical inputs and/or reports sales or deliveries of products to cooperatives. A cooperating farm is therefore not necessarily a formal cooperative member. The dataset includes 5,366 cooperating farms, corresponding to 16,941 annual observations, and 13,758 non-cooperating farms, corresponding to 48,311 observations. FADN weighting coefficients were applied. However, cooperative participation and sales to cooperatives are not stratification variables in the Italian FADN sampling design, and participation is not randomly assigned. The results should therefore be interpreted as descriptive comparisons: observed differences may also reflect sectoral, territorial and farm-size composition and should not be read as causal effects of cooperation. Economic size, Type of Farming and territory are used to disaggregate and interpret the observed patterns. Economic performance is assessed mainly through Net Income (NI) and Net Income per Annual Work Unit (NI/AWU).

Results

At aggregate level, cooperating farms have a smaller average Utilized Agricultural Area than non-cooperating farms, 16.1 versus 20.9 hectares, and a lower average Standard Output, €174,250 versus €196,383. At the same time, they are not concentrated predominantly among the smallest farms. Holdings in the intermediate €25,000–100,000 Standard Output range account for 50.4% of cooperating farms and 43.6% of non-cooperating farms, while farms below €25,000 account for 15.5% and 22.4%, respectively. The share above €100,000 is virtually identical, at 34.1% and 34.0%. Cooperating farms also show higher mechanization per hectare, 8.8 versus 6.5 kW/ha, and higher labour intensity, 23.0 versus 18.1 working days/ha, indicating more intensive production processes on average.

Cooperative participation varies substantially by Type of Farming. Cooperating farms account for 47.9% of holdings in viticulture, 39.0% in dairy cattle and 28.9% in fruit farming, compared with 25.3% across the full sample. Territorial heterogeneity is equally pronounced. The share of regional Gross Saleable Production (GSP) generated by cooperating farms ranges from 5% in Campania to 93% in each of the Autonomous Provinces of Trento and Bolzano. These differences show that the relevance of the cooperative channel cannot be inferred from national averages alone.

A further distinction concerns the production generated by cooperating farms and the share actually marketed through cooperatives. Cooperating farms generate 37% of total GSP in fruit farming, 34% in viticulture and 32% in dairy cattle. Among cooperating farms themselves, however, the share of their GSP actually sold or delivered to cooperatives reaches 73.4% in fruit farming, 67.5% in viticulture and 61.1% in dairy cattle. Because the cooperating group may include both formal members and farms that sell to cooperatives without membership, this second indicator should not be interpreted as a direct measure of member loyalty. It is more appropriately considered a proxy for the intensity of the cooperative commercial relationship, with a higher share indicating stronger reliance on cooperatives as a marketing channel.

Economic results also reveal substantial heterogeneity. Average NI is very similar across the two groups, at approximately €30,000 for cooperating farms and €29,000 for non-cooperating farms. This aggregate similarity masks marked sectoral contrasts. Cooperating fruit farms record an average NI 36% higher than non-cooperating fruit farms, whereas the difference is approximately -60% in viticulture and -24% in dairy cattle. Differences in farm-size composition may contribute to some of these gaps. The evidence therefore does not indicate a uniform cooperative performance premium. A similar pattern emerges for labour profitability. Compared with non-cooperating farms, NI/AWU is 15% higher for cooperating farms in the €25,000–50,000 Standard Output class and 11% higher in the €50,000–100,000 class, whereas the largest class, above €1 million, shows a 53% lower value.

Discussion

Overall, the findings are consistent with interpreting agricultural cooperation as a context-dependent coordination mechanism rather than as a uniform source of farm-level economic advantage. Cooperation is more widespread in some sectors and territories, and the farm-level profiles associated with it differ in size, production intensity and economic outcomes. The results also show that cooperative presence and actual product flows through cooperatives are distinct dimensions: a relatively high incidence of cooperating farms, or of GSP generated by them, does not imply that all production is marketed through the cooperative channel. This distinction is relevant for understanding the capacity of cooperatives to aggregate supply and exploit scale economies in downstream activities. The distinction between the productive weight of cooperating farms and the share of their output actually marketed is therefore important, as these indicators capture different aspects of the relationship between farms and cooperative organizations.

Contributions and Implications

The study contributes by integrating farm-level evidence on cooperative participation, structural characteristics, territorial and sectoral heterogeneity, actual product flows and economic performance within a common multi-year FADN framework. Its main limitation is that the FADN design does not stratify farms by cooperative participation and the analysis does not control for self-selection or other confounding factors. The study therefore does not identify a causal "cooperative effect". Rather, it provides a coherent descriptive framework that can support further research aimed at distinguishing compositional differences from effects associated with cooperation. These findings imply that assessments of the economic relevance of agricultural cooperation should not rely on the incidence of cooperating farms alone. For research and policy analysis, the incidence of cooperating farms should therefore be considered alongside their productive weight and the share of output actually marketed through cooperatives.

Keywords: Agricultural cooperatives; FADN; farm performance; supply concentration; Italy

Theme(s): Agri-Food Cooperatives; Measuring Impact and Performance of Cooperatives

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Contractual Flexibility and Value Creation in Circular Agri-Food Chains: A Literature Review from the Perspective of Cooperatives

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Abstract

Introduction and Rationale

The transition of the European agri-food sector toward circular economy models faces structural challenges related to how contractual relationships between operators are configured. Although the literature on agri-food circularity has grown considerably, most studies focus on waste and by-product management, paying little attention to the institutional and contractual mechanisms that enable or hinder this transition (Esposito et al., 2020). This predominantly technical orientation leaves a central economic question unresolved, namely who bears the costs and risks of closing material loops and how the value generated by closing them is shared. The nature of food chains—perishable products, high differentiation, and strict safety requirements—contributes to the scale of food loss and waste. Around 14% of food is lost between harvest and retail (Food and Agriculture Organization of the United Nations, 2019), and nearly 19% of the food available to consumers is wasted in retail, food service, and households (United Nations Environment Programme, 2024). Added to this are the seasonality of supply, yield variability, and uncertainty about the quality and availability of secondary flows, features that shape operators' decisions (Rico Lugo et al., 2023) and make rigid contracts more costly when conditions change.

In this context, agri-food cooperatives play an essential role. In Spain, they are the main instrument for the collective organization of producers and contribute to the cohesion of rural areas and to balance in the value chain (Bombal, 2010). Their hybrid structure, situated between market and hierarchy, makes them an ideal model for studying how contractual flexibility can foster the adoption of circular business models (Ménard, 2018; Martino & Pampanini, 2006). Moreover, the cooperative occupies a dual position in the chain. It coordinates its members' deliveries while also negotiating as a seller with processors and retailers, and it therefore manages risks in both directions. In its relationship with the member, who is both owner and supplier, instruments provided for in cooperative legislation (Law 27/1999 and regional laws), such as the delivery obligation, minimum membership commitments, or withdrawal conditions, serve, from an economic perspective, as clauses governing the modification and termination of the relationship.

Recent regulatory change also bears directly on this issue. Directive (EU) 2019/633, transposed into Spanish law through Law 16/2021 amending Law 12/2013, seeks to balance relationships between operators with unequal bargaining power (Talavera Cordero, 2024). To this end, it strengthens elements such as written contracts, reference to production costs in price setting, and the prohibition of unilateral modifications. In the case of cooperatives, the reform replaces the full exclusion of their relationship with members with a partial exemption, conditional essentially on the bylaws or corporate resolutions establishing in advance how the price is determined and when it is settled, which could generate internal tensions and affect competitiveness (García Companys, 2023). For its part, Law 1/2025 on the prevention of food loss and waste adds obligations for chain operators that reinforce interest in circularity. Compounding this is the growing concentration of power in the chain, which tends to shift risks and costs toward the weakest links (Cafaggi & Iamiceli, 2019).

Objective

The objective of this study is to conduct a scoping review of the literature that analyzes how flexibility in the design, modification, and termination of agri-food contracts can facilitate the transition toward circular models and value creation, with particular attention to the role of cooperatives. Flexibility is understood to

encompass both flexibility agreed upon ex ante (price review or indexation clauses, quantity bands, duration) and ex post adaptation through renegotiation. This distinction makes it possible to frame the central tension of the study, since food chain regulation protects the weaker party by limiting unilateral modifications, whereas operators in circular chains value the capacity to adapt. The regulatory framework is approached from the perspective of organizational economics, as part of the institutional environment that shapes incentives and risk allocation, without attempting a legal analysis of its content. Three questions derive from this objective, namely (i) which features of contract design are associated in the literature with the adoption of circular practices; (ii) to what extent the cooperative form alters the allocation of risks and of the value generated; and (iii) how the regulatory framework conditions operators' scope for flexibility.

Methodology

The study takes the form of a scoping review and follows the PRISMA-ScR extension, which is better suited than a conventional systematic review to mapping a field in which empirical studies, theoretical work, and technical reports coexist. Searches are conducted in Scopus and Web of Science and supplemented with Dialnet, to capture the Spanish literature on cooperatives and the food chain, and with Google Scholar, limited to the first 200 results per search string sorted by relevance (Haddaway et al., 2015), to incorporate gray literature. The search is organized around four thematic axes, namely contractual flexibility in the agri-food sector; the circular economy and sustainable business models; cooperatives as governance structures; and risk allocation within the European and Spanish regulatory framework (Law 12/2013, Directive 2019/633, and Article 210a of Regulation (EU) 1308/2013). After duplicates are removed, records are screened first by title and abstract and then by full text. Studies are coded according to their theoretical approach—Transaction Cost Economics, incomplete contract theory, relational governance—level of analysis, geographic context, type of contractual clause studied, and circular outcome considered (by-product valorization, loss reduction, or value-added sharing).

Thematic Axes of the Review

The review is organized into four blocks. The first, on contract design for sustainability, shows that contracts with adaptive capacity and coordination mechanisms facilitate the adoption of sustainable practices, although environmental objectives require a broader distribution of responsibilities among operators (Ciliberti et al., 2020). In circular chains, actors prefer flexible contracts with a renegotiation option, short duration, and a guaranteed minimum price (Raimondo et al., 2021). These preferences reveal a characteristic tension. Flexibility facilitates participation in emerging by-product markets, whose value and demand are still volatile, yet stability remains necessary to recoup the specific investments that valorization requires.

The second block examines cooperatives as forms of hybrid governance. According to Transaction Cost Economics, cooperatives and producer organizations act as complementary mechanisms that determine decision rights (Martino & Pampanini, 2006; Ciliberti et al., 2018). By centralizing bargaining power, cooperatives also have collective risk management mechanisms at their disposal, such as shared quality systems (Wever, 2012), which could be extended to the organization of by-product flows that, in isolation, would lack sufficient scale to be valorized.

The third block addresses risk allocation within the regulatory framework. Law 12/2013 and its amendments seek to ensure an equitable distribution of value and risks among actors in the chain (Sánchez Hernández, 2015). However, vertical integration contracts can give rise to abuses when farmers, after making specific investments, face unilaterally imposed renegotiation terms (Albanese, 2015). This risk of opportunistic behavior, known as the hold-up problem, is especially relevant in circular chains, where valorization requires specialized assets with little value outside the relationship. This raises a design dilemma, since clauses that allow the contract to be adapted protect against unforeseen changes but can become an instrument for shifting risks onto the party with less bargaining power (Cafaggi & Iamiceli, 2019).

The fourth block analyzes sustainability agreements between operators. Article 210a of Regulation (EU) 1308/2013 permits voluntary agreements between producers and other operators that exceed minimum legal requirements and include value-sharing clauses (Baayen et al., 2023). These agreements, whether horizontal or vertical, fall outside the general prohibition on anticompetitive agreements provided that the restrictions are indispensable to the sustainability objective pursued. For cooperatives, this instrument offers a means of articulating collective circularity commitments and compensating members for the additional costs these entail.

Expected Contribution

The review aims to make three contributions. First, it seeks to provide a systematic map that integrates approaches to the agri-food circular economy, incomplete contract theory, and cooperative governance, three streams that have developed in parallel with little dialogue among them. Second, it seeks to identify research gaps, particularly the lack of empirical studies linking contractual modification or termination clauses to observable circular outcomes, as well as the scarcity of economic analysis of how the reform of Law 12/2013 affects the internal management of cooperatives. Third, it proposes an analytical framework relating clause type, governance form, and circular outcome, intended to guide future empirical studies on how cooperatives can design flexible relationships that drive circularity without compromising equity in the distribution of value.

Keywords: scoping review; contractual flexibility; circular economy; agri-food cooperatives; hybrid governance; transaction costs; food chain; risk allocation

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The Internal Governance of Agricultural Cooperatives: When Tough-Riders Step In

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Abstract

The paper presents a game-theoretical analysis of the internal governance of agricultural cooperatives, focusing on collective action problems associated with multiple principal–agent relationships between members, boards of directors, and chief executive officers. In these relationships, informational asymmetries create opportunities for opportunistic behavior by self-interested actors (Easy-Riders). While collaboration-oriented actors (Hard-Riders) promote collective outcomes based on trust, they cannot enforce collaboration on their own. This paper identifies a mechanism of endogenous enforcement within cooperative governance, whereby Tough-Riders (a subset of Hard-Riders) alter incentive structures to restore collaboration under conditions of opportunism. Using stylized game-theoretical models, we demonstrate how Tough-Rider interventions enable interest alignment and the implementation of strategies that serve members' long-term interests. The findings contribute to the literature on cooperative governance by identifying a key mechanism through which collective action problems can be mitigated and by highlighting the importance of governance structures that enable effective intervention.

Background

Many agricultural cooperatives make difficult decisions about mergers and acquisitions (Nilsson and Hakelius, 2026), and the members' property rights and decision rights are continually being modified (Chaddad and Cook, 2004). Agricultural cooperatives increasingly adopt new ownership structures, governance arrangements, and strategic alliances in response to intensified competition (Hansen et al., 2024; Höhler et al, 2026). The management is gaining increasing power (Bijman et al., 2013). Boards of directors formally make many strategic decisions, while CEOs implement them and members provide authorization or consent through the cooperative's representative governance system. Thus, there is an interesting agency problem in the relation between the board and the chief executive officer. However, researchers seldom discuss the other agency problem, namely that between the membership and the board of directors. Both agency relationships should be considered if it should be possible to understand whether the decisions about structural reorientation are in accordance with the long-term interests of the farmer-members.

Aims

The study identifies Tough-Riders as a mechanism of endogenous enforcement in cooperative governance. It shows how institutional, economic, and social resources can be used to realign the interests of members, boards, and chief executive officers when opportunistic behavior threatens collective outcomes. Effective cooperative governance therefore depends not only on formal institutional design, but also on the presence of actors who are willing and able to activate enforcement mechanisms.

Methods

The agency relationships between the membership and the board of directors as well as the one between the board and the top management can be analyzed in terms of game theory (Hendrikse and Nilsson, 2023, Svendsen et al., 2023). The models distinguish between self-interested Easy-Riders, collaboration-oriented Hard-Riders, and Tough-Riders, who are Hard-Riders willing and able to use rewards, sanctions, or social pressure when collaboration is threatened.

Results

The agency relationships between the boards of directors and their chief executive officers are treated in many previous studies, which almost unanimously consider these relationships to be skewed to the advantage of the top management (Bijman et al., 2013; Chaddad and Iliopoulos 2013). The other agency relationship – that between the membership (the principal) and the board (the agent) is hardly touched upon by researchers. This study agrees that both agency relationships are problematic, but in both cases, there may be limits to the problems. If there are games only between the principals and the agents, the latter one often wins the game. The problem may be mitigated when Tough-Riders step in and use institutional, economic, or social resources to change the Easy-Rider's payoff structure. Tough-Rider capacity may be located among board members, active member groups, auditors, nomination committees, or other governance actors with the resources and legitimacy to discipline opportunism.

Discussion

The discussion relates the stylized games to documented cases of cooperative mergers, restructuring, and organizational failure reported in the existing literature. The examples illustrate how trust, social capital, information asymmetry, and enforcement capacity shape governance outcomes. Even though most members are passive in the internal governance of their cooperatives, their interests are considered. The analysis suggests that cooperative memberships and governance structures may contain actors capable of performing the Tough-Rider role, although their presence and effectiveness vary across organizations and situations.

Contributions and Implications

This study has implications for our understanding of how cooperatives' structural decisions are made. The study implies that the interests of the membership, the boards and the CEOs may be aligned.

Keywords: Board of directors; Chief executive officer; Elected representative; Membership; Trust

Theme(s): Cooperative Governance and Management; Agri-Food Cooperatives

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“Specialities and Fundamentals” The specific rules governing Hungarian agricultural cooperatives in relation to the general regulatory framework for cooperatives

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Abstract

In Hungary, the general regulatory framework governing cooperatives is set out in the Act V of 2013 on the Civil Code (Civil Code) and Act X of 2006 on Cooperatives (Cooperative Act). In addition to the general provisions, the Cooperative Act also contains specific rules applicable to certain types of cooperatives, including agricultural cooperatives. The purpose of this analysis is to examine the specific regulatory provisions applicable to agricultural cooperatives under the Cooperative Act, with particular emphasis on the areas of regulation concerned, the substantive content of these provisions, and the rationale for their introduction. The analysis examines the structural framework of the Cooperative Act. It also identifies the specific provisions concerning agricultural cooperatives and their position within the overall structure of the Cooperative Act. In this context, the presentation highlights the sectors in which agricultural cooperatives are established and operate. The analysis notes that, within the regulatory framework governing agricultural cooperatives, the Hungarian legislature identifies three principal sectors in which an agricultural cooperative may operate: the agricultural sector, the forestry sector, and the food-processing sector. The analysis presents the main, specific activities that the legislature designates as the operations of agricultural cooperatives and that serve the members' benefit. The presentation also discusses the fundamental definition of a cooperative in the Civil Code, upon which the specific regulatory framework for agricultural cooperatives is based. In examining the concept of a cooperative under the Civil Code, the presentation places particular emphasis on the dual obligations of cooperative members, namely, the obligation to make a capital contribution to the cooperative and the obligation to provide personal contribution to its activities. The analysis highlights the legal nature of the capital contribution, its mandatory character according to Hungarian law, and the flexibility of the applicable regulatory framework. In this regard, neither the Civil Code nor the Cooperative Act lays down detailed rules governing the capital contribution; consequently, the relevant provisions set out in the bylaws of the agricultural cooperative constitute the applicable framework in this respect. The analysis also points out that both the Civil Code and the Cooperative Act are underpinned by the international cooperative principles, which consequently also shape the specific regulatory framework applicable to agricultural cooperatives. The presentation also addresses the specific rules governing the operational basis of agricultural cooperatives and their membership under the Civil Code. In addition, the analysis addresses the property-law provisions applicable to agricultural cooperatives, demonstrating the specific features of the regulatory framework in this area as well. In this area, the analysis presents the specific asset-based framework governing the operation of agricultural cooperatives, which constitutes a ‘differentia specifica’ of the Hungarian legal framework governing agricultural cooperative property relations. It also highlights the guarantee function of the relevant provisions, which helps ensure the transparent and efficient management of agricultural cooperatives. The analysis highlights that this approach provides an optimal regulatory solution, as members must regulate this specific property-law basis in the bylaws of the agricultural cooperative. The analysis concludes that the characteristics of agricultural cooperatives become evident through the presentation of the regulations, and it highlights the advantages of this type of cooperative. The analysis contributes to promoting this type of cooperative, which has a long history and continues to yield complex results. The analysis also contributes by outlining a possible regulatory framework specifically tailored to agricultural cooperatives. The analysis employs a legal-dogmatic and

comparative methodology, using the provisions of the Civil Code and the Cooperative Act as the principal points of reference for the legal comparison.

Keywords: agricultural cooperative; Hungarian Civil Code; Hungarian Cooperative Act; specific cooperative rules

Theme(s): Cooperative Law; Agri-Food Cooperatives

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From Affective to Real Commitment: How Agri-food Cooperatives Drive Sustainable Agricultural Practices

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Abstract

Background

The transition towards sustainable agricultural management models that promote healthier soils capable of maintaining the ecosystem services they provide has become a global priority (Sharma et al., 2024; Ţopa et al., 2025). In this context, fostering the adoption of sustainable soil management practices in agriculture, such as regulated deficit irrigation, crop diversification, or biological pest control, is essential. Consequently, it is particularly relevant to understand which farm-related factors, as well as which attitudinal or motivational aspects of farmers, condition the adoption of such practices.

In this regard, most scientific literature argues that adoption depends primarily on technical and economic factors, such as the availability of the productive resources required for implementation. Among the main barriers identified, previous studies highlight the lack of specialized knowledge, the need for additional investments, the small size of farms, and difficulties in accessing both technical advice and financial resources (Autio et al., 2021; Pedersen et al., 2024). However, another stream of research maintains that the psychological dimension, that is, environmental sensitivity, attitudes, or the degree of ecological commitment of farmers themselves, also constitutes a key factor for the implementation of these practices (Savari et al., 2023; Swart et al., 2023).

In this scenario, agri-food cooperatives position themselves as key actors in promoting agricultural sustainability. These organizations not only perform market-related functions linked to commercialization and input supply, but also provide information, training, and technical advisory services to their members, helping them overcome the barriers mentioned above and thereby facilitating the adoption of sustainable agricultural practices (Arcas et al., 2022; Bijman et al., 2012). Likewise, they contribute to reducing information asymmetries and adoption costs associated with such practices (Candemir et al., 2021), while also playing an important role in the diffusion of agricultural innovations and in helping farms adapt to increasing environmental requirements arising from public policies and agri-food markets (Kumar et al., 2020; Manda et al., 2020). It is expected that this broad range of services, in addition to influencing technical and economic factors, may also impact on the cognitive sphere of farmers, reinforcing their environmental awareness and commitment to sustainability, ultimately leading them to adopt sustainable practices.

More specifically, from the perspective of sustainable commitment, environmental psychology has widely described the phenomenon known as the Value-Action Gap, that is, the gap between “wanting to act” and actually “acting” (Franco et al., 2022; Nguyen et al., 2018; Vieira et al., 2023). This phenomenon explains how, in some cases, individuals with high theoretical environmental sensitivity fail to engage in actual behaviors due to various barriers, such as those previously mentioned regarding the adoption of sustainable practices. In this context, agri-food cooperatives emerge as strategic organizations because, as noted above, they may help farmers overcome such barriers. However, an important question remains

unresolved: Do cooperatives act by transforming farmers' psychology and internal values, or do they function as pragmatic structures that facilitate action regardless of farmers' prior convictions?

Aims

To address this question, this study analyzes whether membership in an agri-food cooperative influences farmers' ecological commitment by considering three dimensions of such commitment: affective, verbal, and real.

Methods

The study is based on data collected through a survey conducted among agricultural producers in the Region of Murcia, including both cooperative members and non-members. This dataset allows comparison of affective, verbal, and real ecological commitment levels and thus helps identify the impact of cooperatives in this regard. Since the decision to join an agri-food cooperative is made voluntarily by individuals, comparing observed commitment levels between members and non-members may lead to biased estimates of the cooperative effect on farmers' environmental commitment. For example, farmers with stronger verbal commitment may perceive cooperatives as a viable means of materializing their environmental concerns, given that the services provided by these organizations can support sustainable practices and therefore may be more likely to become cooperative members.

To correct potential selection bias problems and isolate the true effect of cooperatives on farmers' environmental commitment, the Propensity Score Matching (PSM) technique is applied.

Results

Preliminary results reveal, first, the existence of self-selection bias, as the results obtained through a simple comparison of means (ANOVA) differ from those derived from the PSM technique. Second, results show that while affective commitment is higher among non-members compared to cooperative members, real commitment is higher among cooperative members. These findings highlight the role played by cooperatives in fostering real ecological commitment and position them as a powerful institutional mechanism capable of bridging the gap between low predisposition and low actual environmental action. In other words, farmers do not necessarily join cooperatives out of environmental concern (indeed, the profile of cooperative members appears to be less affectively sensitive than that of independent farmers, probably because members are more focused on economic and market viability). However, once inside the cooperative, the organization compensates for this lower individual sensitivity through collective channels and support services that ultimately promote real environmental commitment.

Keywords: Agri-food cooperatives; ecological commitment; agricultural sustainability; environmental behavior; sustainability

Theme(s): Environmental and Social Sustainability in Cooperatives; Agri-Food Cooperatives

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Technological Innovation and Strengthening of Cooperativism in Family Farming: Social Technologies for the Qualification of Licuri Oil in Bahia, Brazil

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Abstract

Family farming in Bahia plays a strategic role in food security, employment, and the reproduction of rural livelihoods, yet many family farmers and agroextractivist communities remain excluded from regulated and higher-value markets because production is fragmented and quality-assurance services are costly or geographically inaccessible. In the semi-arid Sisal Territory, the extraction and processing of licuri (Syagrus coronata), a native palm of the Caatinga biome, provide food and income while reinforcing territorial identity and ecological resilience. However, variability in raw materials, insufficiently standardised processing, weak batch traceability, and dependence on external laboratories constrain the commercial expansion of licuri oil. These challenges are not merely technical. They reduce the ability of small producers to coordinate production, negotiate collectively, comply with food regulations, and retain value within their territory. This study focuses on COOPERSABOR, the Regional Cooperative of Family Farmers and Extractivists of the Popular and Solidarity Economy. Established in 2014, COOPERSABOR organises solidarity-based producer groups, many involving women and young people, and coordinates the commercialisation of products derived from licuri and other Caatinga resources (Associação Regional dos Grupos Solidários de Geração de Renda [ARESOL], 2024). In accordance with cooperative principles of democratic member control, education, cooperation, and concern for community (International Cooperative Alliance [ICA], 2015), the cooperative is understood here as the central organisational setting in which the project's technological, economic, and social outcomes are defined and assessed. Against this background, the study aims to examine how cooperative-centred technology co-design can strengthen COOPERSABOR's capacity to govern quality, coordinate member production, and improve its position in the licuri value chain. More specifically, it seeks to develop accessible analytical and processing technologies in response to priorities established with the cooperative; integrate these tools into collective quality-assurance, traceability, and commercial decision-making routines; and assess their potential contribution to technical autonomy, regulatory readiness, market access, fairer value distribution, and the participation of women and young people. Methodologically, the research is structured as a participatory action-research case study involving COOPERSABOR, Universidade Federal do Recôncavo da Bahia (UFRB), and Escola Família Agrícola do Sertão (EFASE). COOPERSABOR is treated not as a final beneficiary but as a research and governance partner. It will identify production and market bottlenecks, help establish technological priorities, nominate local operators, evaluate usability, and incorporate validated solutions into its collective routines. UFRB provides analytical and engineering expertise, while EFASE serves as the educational and community interface and hosts field-based experimentation. The research comprises participatory workshops, interviews, and mapping of production and decision processes; co-definition of performance, maintenance, cost, and accessibility requirements; development and analytical validation of low-cost digital image colorimetry systems for acidity, peroxide, and iodine indices; automation using Arduino and Raspberry Pi; and construction of cleaning sieves, temperature-controlled hydraulic presses, and stainless-steel pre-filter tanks. Smartphone-based digital image colorimetry is especially relevant

because it can reduce equipment costs and support portable measurements, although controlled illumination, geometry, calibration, and device variability must be addressed to ensure reliable results (Fan et al., 2021). Field validation will link EFASE's productive unit to COOPERSABOR's quality and commercialisation workflows. The evaluation will combine analytical indicators, including accuracy, precision, working range, and robustness, with cooperative indicators such as testing cost and time, operator usability, adoption in collective routines, batch traceability, conformity rates, new market opportunities, member participation, and perceived distribution of benefits. The principal result of the project's initial design stage is a cooperative innovation framework that connects technological development to four interdependent organisational bottlenecks: dependence on external laboratories; absence of shared production and quality protocols; insufficient traceability across community-based suppliers; and ergonomic burdens associated with manual licuri processing, particularly for women. These bottlenecks direct the technological work towards cooperative-scale solutions that can be operated, maintained, and governed locally. The planned portfolio therefore combines analytical devices, processing equipment, shared operating procedures, training, and a traceability framework rather than treating each prototype as an isolated laboratory output. Planned joint intellectual-property ownership among UFRB, COOPERSABOR, and EFASE further positions the resulting technologies as collectively controlled assets. Expected operational results include lower testing costs, reduced external dependency, greater product consistency, more transparent quality decisions, improved regulatory readiness, and stronger bargaining power for the cooperative and its member groups. These results support the interpretation that cooperative organisation is not a contextual detail but a condition for converting technical innovation into durable territorial development. Agricultural cooperatives can reduce coordination and transaction problems, although their long-term performance depends on appropriate governance arrangements and member incentives (Cook, 1995). Similarly, the collective management of equipment, protocols, data, and knowledge requires locally legitimate rules for access, monitoring, maintenance, and benefit sharing (Ostrom, 1990). Placing COOPERSABOR at the centre therefore changes the initiative from a conventional technology-transfer project into a cooperative innovation process. The cooperative aggregates demand, establishes common standards, coordinates market entry, manages shared resources, and connects scientific outputs to collective economic action. EFASE supports learning and community participation, and UFRB supplies scientific rigour, but COOPERSABOR provides the institutional continuity required for adoption after the research cycle ends. This study contributes to the literature on agri-food cooperatives by presenting a Global South case in which a member-oriented enterprise simultaneously acts as an innovation partner, a governance structure for shared technology, and a mechanism for territorial value retention. The proposed model is potentially transferable to other biodiversity-based value chains in which small producers face high quality-assurance costs and unequal access to digital technologies. By linking technological autonomy to democratic coordination, gender-sensitive improvements in work, ecological valorisation, and fairer market participation, the study demonstrates how cooperative enterprises can address economic, social, technological, and environmental challenges together.

Keywords: Agri-food cooperatives; participatory innovation; digital image colorimetry; licuri; cooperative governance

Theme(s): Agri-Food Cooperatives; Social Innovation, Community Development, and Civic Wealth Creation

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Contract farming concluded by cooperatives in the agri-food chain – selected issues under Polish and EU law

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Abstract

Background

Agricultural cooperatives' operations are significantly influenced by the agricultural contracts they enter into as a result of their farming activities. These primarily involve contracts for the procurement and sale of agricultural products. A procurement contract aims to link agricultural production with its distribution to the market by ensuring that the agricultural producer has a market for the products they produce. Its characteristic features include the production and delivery of specific agricultural products. Importantly, agricultural cooperatives can act both as agricultural producers (agricultural production cooperatives, social cooperatives, agricultural producer groups, and farmers' cooperatives engaged in agricultural activities) and as contracting parties (e.g., dairy cooperatives or others). These contracts have a long tradition and are popular almost worldwide, although they take various legal forms. They are not only of practical importance; the topic is also addressed by organizations such as the FAO, UNIDROIT, and COGECA.

The need for such contracts stems, for example, from the seasonal nature of agricultural activity, its dependence on weather conditions, and the relatively long production process. On the one hand, a contracting agreement helps ensure food security (i.e., consistent access to sufficient quantities of safe and nutrient-rich food). On the other hand, it contributes to the quality of agricultural products and food safety (the set of conditions that must be met and actions that must be taken at all stages of food production or distribution to ensure human health and life).

Contract farming is an important issue in light of the challenges that will arise in the coming years. Current challenges include strengthening the legal position of agricultural producers in the agri-food chain—particularly those running family farms—as well as food security, sustainable agriculture, and climate change. As a rule, each country has its own domestic legal regulations regarding contract farming agreements. In the European Union, however, procurement contracts are influenced not only by the laws of member states but also by EU regulations. Of particular note is Regulation 1308/2013 establishing a common organization of the markets in agricultural products, which addresses the form and content of such contracts.

The topic of contract farming is also highly relevant in light of Regulation (EU) 2026/1739 of the European Parliament and of the Council of July 8, 2026, adopted in July, amending Regulations (EU) No. 1308/2013, (EU) 2021/2115, and (EU) 2021/2116 with regard to strengthening the position of farmers in the food supply chain in relation to sustainable agricultural development through contracts, which introduces changes regarding contracts, including those concluded by cooperatives, groups, or agricultural producer organizations.

The aim of this paper (article) is to attempt to determine whether and to what extent Polish and EU regulations concerning contractual agreements protect cooperatives and their members within the agri-food chain, as well as which elements are particularly important in terms of maintaining food security and food safety or achieving sustainable development goals. It is worth noting that Goal 2 of the 2030 Agenda calls for "End hunger, achieve food security and improved nutrition, and promote sustainable agriculture".

Methods

The primary research method was a dogmatic analysis of normative texts, characteristic of legal scholarship. The study primarily examined legal acts in the fields of civil law, EU administrative law, and financial law, with consideration given to agricultural aspects. Reference was made to statistical data.

Discussion

This section will present selected issues concerning contract farming agreements under Polish law, such as the duration, form, and content of the contract farming agreement, additional benefits, and the determination of payment terms for agricultural products. One of the characteristic features of a contract farming agreement is the contracting party's right to supervision and control, as specified in Article 617 of the Civil Code. This is a right, not an obligation. This provision relates to the producer's performance of the contract. These rights pertain to the production cycle of the agricultural product and concern, in particular, the technical conditions of cultivation or breeding. This is an important provision in the context of food safety. This is because the contract can specify the conditions and rules for the production of agricultural products, the general conditions that must be met, and the actions that must be taken at all stages of production. Reference will be made to the possibility of continuing the contract in the event of a change in ownership, such as the transfer of a farm to the younger generation.

Another important part of the paper will be a discussion of EU Regulation No. 1308 on agricultural markets, other EU regulations, and an attempt to determine how EU regulations concerning agricultural markets and emergency situations affect the conclusion and implementation of contract farming agreements, as well as specific elements related to individual agricultural markets.

Reference will be made to Directive (EU) 2019/633 of the European Parliament and of the Council of April 17, 2019, on unfair trading practices in business-to-business relationships in the agricultural and food supply chain, as well as to the Polish Act of November 17, 2021, on counteracting the unfair exploitation of contractual advantage in trade in agricultural and food products. The Act sets forth the rules and procedures for counteracting, in order to protect the public interest, practices that unfairly exploit contractual advantage by buyers of agricultural or food products or by suppliers of such products. Under this Polish law, practices that unfairly exploit a buyer's contractual advantage over a supplier—or a supplier's contractual advantage over a buyer—are prohibited. The exploitation of a contractual advantage is considered unfair if it threatens or infringes upon a material interest of the other party. The significance of the Office of Competition and Consumer Protection in combating unfair practices in procurement contracts will be presented in paper.

Conclusions

In summary, the author stated, among other things, that the contract farming agreement is an important instrument in the agri-food chain, and that Polish and EU legislators are introducing regulations designed to protect agricultural producers, cooperatives, and strengthen their position in the agricultural market. The contract farming agreement is a key instrument influencing the organization and management of agricultural markets, the modernization of agriculture, and the assurance of technological progress (the function of modernizing agricultural production). Polish and EU regulations on contract farming include legal provisions that support food security and food safety, such as those concerning control and supervision by the contracting party, financial support for agricultural producers, and the possibility of entering into long-term contract farming agreements. Sustainable development is promoted, for example, through contract farming agreements that take into account economic, social, and environmental factors, while the provisions of many of them also consider future generations (e.g., legal succession in the event of a farm transfer). A contract farming agreement typically imposes obligations related to environmental protection, the appropriate type of seeds and fertilizers, and cultivation practices. It provides a stable source of income and helps strengthen the legal position of the agricultural producer and cooperatives within the agri-food chain.

Keywords: agricultural cooperatives; food supply chain; contract farming; unfair trading practices; cooperative groups of agricultural producers; dairy cooperatives

Theme(s): Cooperative Law; Agri-Food Cooperatives

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Commentary on the Civil Code Regarding Contract Farming Agreements in Poland

Directive (EU) 2019/633 of the European Parliament and of the Council of April 17, 2019, on unfair trading practices in business-to-business relations in the agricultural and food supply chain

Regulation (EU) 2026/1739 of the European Parliament and of the Council of July 8, 2026, amending Regulations (EU) No. 1308/2013, (EU) 2021/2115, and (EU) 2021/2116 with regard to strengthening the position of farmers in the food supply chain

Regulation (EU) No. 1308/2013 of the European Parliament and of the Council of December 17, 2013, establishing a common organization of the markets in agricultural products

The Act of November 17, 2021, on counteracting the unfair exploitation of contractual advantage in trade in agricultural and food products.

Agri-food cooperatives in the Balearic Islands: legal challenges posed by touristification and insularity and opportunities for sustainable development

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Abstract

Agri-food cooperativism has demonstrated its resilience throughout recent global crises -economic, political and even health-related-, supporting stable employment, cooperative continuity and, insofar as possible, community development (ALFONSO, 2021: 207; CHAVES, 2020: 30-31). This territorial permanence is especially relevant in rural and peripheral contexts.

The adaptability of the cooperative model, together with the cooperative principles of the International Cooperative Alliance and the values inherent to this type of company, makes cooperative societies particularly suitable for addressing the dual ecological and digital transition affecting the agri-food sector, as well as the challenges of supply concentration, professionalization, technological innovation and producers' bargaining position (DE ÍSCAR, 2025: 66-67). From a commercial-law perspective, this derives from combining business activity and democratic participation, prioritizing cooperative activity over capital remuneration and enabling economic integration while preserving autonomy.

Agri-food cooperativism in the Balearic Islands faces the common challenges of digitalization, triple economic, environmental and social sustainability and generational renewal (JULIÁ, 2024: 27), together with difficulties arising from insularity and the archipelago's economic structure. These include market fragmentation, higher logistics and transport costs, dependence on external supplies, small farm size and pressure from tourism and urban development on agricultural land.

Water management is another major constraint. Tourism seasonality increases pressure on limited resources precisely when irrigation and production needs are greatest. The issue therefore concerns availability, governance, efficiency and climate adaptation. Cooperative planning may facilitate common investment in irrigation modernization and access to control, storage and reuse technologies.

Access to Common Agricultural Policy aid and other financing is likewise difficult for small farms and entities because of the administrative, technical and financial costs involved. (CUBERO, MORIES, & TORIBIO, 2024) Cooperatives can therefore provide intermediation, technical assistance and supply concentration, reducing transaction costs for small-scale producers.

The most recent official data confirm this structural characterization. According to the CAIB, in 2022 the Balearic agri-food cooperative sector comprised 30 first-tier cooperatives, five SATs and one second-tier cooperative, generating €112 million in turnover and bringing together 7,789 farmers and livestock breeders across four islands, mainly in dried fruit, cereals, and fruit and vegetables. Moreover, 65.50% had a turnover below €2 million and 82.70% below €5 million.

This atomized structure may constrain investment, marketing, digitalization and bargaining capacity, but can be addressed through second-tier cooperatives, cooperative groups, inter-cooperative agreements and structural operations (VARGAS & CANO, 2018). Regional aid similarly supports integration, mergers and digitalization, including expenditure aimed at improving efficiency and competitiveness.

Pressure on rural land is another specific challenge. Urban expansion, changes in land use and touristification may reduce agricultural land and increase prices, hindering access for young farmers and new cooperative projects. In an island community, loss of agricultural land affects food production, landscape, territorial management, fire prevention, biodiversity and the islands' territorial identity. From

this perspective, the cooperative principle of concern for community acquires particular relevance. (HERNÁNDEZ, 2021).

Generational renewal is a broader challenge for Spanish agri-food cooperativism: ageing membership, difficulties accessing land and financing, limited profitability and competing land uses may affect agricultural continuity and cooperative governance. The challenge is not merely to incorporate young members, but to ensure their participation in management and decision-making, knowledge transfer and professionalization (DE ÍSCAR, 2024). In the Balearic Islands, however, available data show a positive evolution. According to the latest OSCAE report, published in 2024 and referring to 2023, people under forty represented 17% of members, 18% of governing boards, 20% of presidencies and 29% of management positions. Particularly significant is the increase in presidencies, from no representation in 2018 to 20% in 2023, indicating growing youth leadership and opportunities for business continuity and territorial embeddedness.

The Balearic agri-food cooperative sector also benefits from opportunities linked to demand for organic, local and proximity products, traceability and sustainability. The islands have several protected quality schemes, including the DOP Oli de Mallorca, the DOP Mahón-Menorca, the DOP Sobrassada de Mallorca, the IGP Ensaimada de Mallorca and wine designations such as Binissalem or Pla i Llevant. These schemes strengthen the territorial identity and added value of cooperative products, particularly in tourism and the HORECA channel.

In this regard, Law 3/2022, of 15 June, on urgent measures for the sustainability and circularity of tourism in the Balearic Islands, establishes measures capable of strengthening links between tourism and agri-food production. It introduces circularity plans for certain establishments and identifies water, energy, food, materials and waste as priorities. Article 102 bis of Law 8/2012, introduced by Law 3/2022, requires, where applicable, a minimum consumption of 3% of fresh agricultural, livestock and fishery products of Balearic origin, rising to 4% in certain four- and five-star hotels and to 5% in agrotourism establishments.

The measure may strengthen local demand and short marketing circuits, although its effectiveness depends on local supply, cooperatives' capacity to ensure seasonal availability and monitoring. As no systematic public evaluation of compliance has been identified, the paper examines whether it genuinely integrates agri-food and tourism value chains or remains a formal obligation difficult to monitor.

The analysis also incorporates a gender dimension. In 2022, women represented over 23% of members of Balearic agri-food cooperatives, but only 9.2% of governing boards, despite their growing representation. Women also accounted for 30.7% of the workforce of agricultural associative entities. Thus, although female participation is increasing, it remains limited in decision-making. In this sense, Article 11 of Law 5/2023 promotes equal opportunities and balanced governing bodies, and allows cooperatives with 50 or more members to establish an equality committee.Within our field of research -commercial law and company law-, the paper analyzes Law 5/2023, of 8 March, on cooperative societies of the Balearic Islands.

The law repeals Law 1/2003, of 20 March, and incorporates the micro-cooperative regime previously regulated by Law 4/2019, of 31 January, establishing a unified framework that reconciles cooperative principles with greater organizational flexibility and competitiveness.

The legislation is particularly relevant for its commitment to digital transformation. As demonstrated in previous research through a comparative analysis of Spanish regional cooperative legislation, Balearic regulation is among the most advanced in incorporating digital instruments into the organization, operation and decision-making of corporate bodies. It recognizes the corporate website as a communication channel, permits electronic means in relations with members and allows telematic or hybrid meetings, subject to safeguards concerning identification, participation, voting and recording of decisions (DE ÍSCAR, 2025).

This modernization may facilitate members' political and economic rights, strengthen transparency, reduce management and travel costs and promote participation. These possibilities are particularly relevant in the

archipelago, where insularity creates barriers to face-to-face participation, although physical deliberation remains important to cooperative democratic culture.

Law 5/2023 also addresses the limited scale of many agri-food cooperatives. The micro-cooperative regime facilitates small-scale projects, while second-tier cooperatives, cooperative groups and inter-cooperative agreements promote economic cooperation, supply concentration and competitiveness while preserving legal autonomy. The framework therefore combines organizational flexibility with integration mechanisms.

The paper also examines cooperatives as instruments of business restructuring, considering transformation, merger and other structural operations, together with the pre-insolvency mechanisms introduced by Law 16/2022. In particular, restructuring plans and debt capitalization will be assessed for their potential to ensure viable continuity, address indebtedness and facilitate generational renewal, including through the incorporation of new members (THOMÀS, 2024).

Overall, the study highlights the potential of Balearic agri-food cooperativism to address insularity, limited scale, access to land, tourism pressure and climate change. Law 5/2023 provides a relevant framework by combining digitalization, equality, organizational flexibility and business integration.

Keywords: Agri-food cooperatives; Balearic Islands; touristification; legal challenges

Theme(s): Cooperative Law; Agri-Food Cooperatives

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Generational Renewal as a Challenge for Cooperative Agriculture: Evidence from Multi-Level Cooperative Initiatives in Rural Spain

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Abstract

Background

Generational renewal has become one of the most pressing structural challenges facing European agriculture. The ageing of farmers and the declining share of young farm managers threaten the long-term sustainability of agricultural production and rural cohesion (European Commission, 2025). In addition, economic uncertainty, labor instability, significant entry costs, and the relatively low social recognition of agricultural work continue to limit the attractiveness of farming for younger generations.

In Mediterranean regions characterized by small-scale farms and fragmented landholdings, generational renewal is closely linked to broader constraints affecting agricultural systems. In several Spanish cooperative areas, land abandonment and the decline in active farmers can directly reduce supply volumes and weaken the economic viability of agri-food value chains (Piñeiro et al., 2021; Calafat-Marzal et al., 2023).

Empirical research conducted at Universitat Politècnica de València (UPV) suggests that entry barriers for young farmers are multidimensional. Configurational analyses indicate that generational renewal depends on combinations of factors rather than on isolated variables. These include farm structure, territorial characteristics, and the dynamism of local agri-food systems. (Calafat-Marzal et al., 2026). Generational renewal should be understood not only as a demographic issue but also as a systemic challenge involving land governance, value-chain organization, and rural economic dynamics.

Within this context, this contribution explores the contribution of cooperative organizations as coordinating institutions to facilitate entry into farming by providing technical support, improving access to markets, and coordinating collective responses to structural constraints (Garcia-Alvarez-Coque & Piñeiro, 2022; Juliá-Igual, et al., 2012). By linking production, industrialization, knowledge, and commercialization systems, cooperatives help to reduce some of the uncertainties faced by new farmers.

A configurational study of 542 Valencian municipalities found that no single condition explains youth attraction. Larger farm structures featured in all three configurations associated with high youth attraction, while agribusiness dynamism appeared in all three high-attraction configurations and was absent in the two low-attraction configurations. However, agribusiness dynamism was not strictly necessary as an individual condition. This supports combining farm-level measures with territorial cooperative support (Calafat-Marzal et al., 2026a).

Methods

This study combines quantitative and qualitative evidence to analyze generational renewal in Mediterranean Spain and the role of cooperative initiatives in supporting new entrants.

First, the analysis synthesizes recent empirical research conducted at UPV on land markets, territorial pressures, and the conditions affecting young farmer entry. This includes regional statistical evidence on farm demographics and territorial characteristics in rural areas of the Valencian Community, including the presence of agri-food cooperatives. Data were collected at a municipal level from diverse sources, including the Spanish Statistical Institute (INE) and the Statistical Gate of Generalitat Valenciana.

Second, the study incorporates qualitative evidence from agri-food cooperatives and focuses on a case study of the *Releva* initiative, promoted by ANECOOP, a major second-tier cooperative that integrates numerous local cooperatives. Data sources include program documentation, in-depth interviews with cooperative leaders and participating young farmers, and operational insights from Agencia AGROA, which coordinated the design and implementation of the initiative.

The qualitative material is interpreted thematically around recurring dimensions identified in the research questions: barriers to entry, forms of cooperative support, market integration and opportunities for organisational participation. Evidence from programme documentation, interviews and implementation experience is brought together to identify plausible mechanisms rather than to estimate causal effects. As the material includes practitioner perspectives, the analysis treats operational accounts as contextual evidence and avoids generalising programme experiences to all cooperatives or entrants.

Results

The analysis confirms that generational renewal in Mediterranean Spain is shaped by a combination of territorial, economic, and institutional factors. Access to land remains a key constraint due to farm fragmentation, rising land values in peri-urban areas, and the limited mobility of agricultural plots.

At the same time, the profile of new entrants into agriculture appears to be evolving. Entry into farming increasingly occurs outside traditional family succession pathways. A growing number of young farmers have higher levels of formal education and approach agriculture as an entrepreneurial activity. These entrants often require new forms of support, not only financial but also related to technical guidance, organizational assistance, and access to stable marketing channels. In this context, cooperatives reduce entry barriers by providing integrated support structures.

Experience from the Innoland initiative also suggests a complementary practical lesson: generational renewal does not depend only on older farmers being willing to make their plots available. It also requires identifying and supporting new entrants who are willing and able to cultivate them. This practice-based observation, not a measured impact, suggests linking land mobilisation to technical support and viable cooperative farming projects. It provides a useful antecedent for interpreting the integrated approach pursued by RELEVA.

By leveraging established commercial networks and value-chain infrastructures, cooperatives enable new farmers to industrialize their products and capture higher added value. These collective structures facilitate market access, strengthen bargaining power, and drive innovation through joint R&D&I investments that would otherwise only be feasible for large-scale producers.

A further dimension concerns governance renewal within cooperative organizations. As new farmers enter cooperative structures, they may progressively participate in governing bodies and decision-making processes. This participation can contribute to the generational renewal of cooperative leadership and help align organizational strategies with the perspectives of younger members.

The *Releva* initiative, promoted by ANECOOP, illustrates how these elements can be operationalized in practice. The program aims to attract and support young farmers through technical mentoring, professional training, and integration into cooperative marketing networks. In addition, it encourages the involvement of new farmers in cooperative organizational structures and long-term strategic planning processes.

The case illustrates a potential division of complementary roles: a second-tier cooperative can connect participants to established value chains; local cooperatives provide proximity to production contexts; and specialised technical advisers help translate objectives into individual farm-development plans. The significance of this arrangement lies in coordinating these functions rather than treating training, business planning and marketing as isolated interventions. Early programme activities should nevertheless be distinguished from verified long-term outcomes.

Discussion and Implications

Cooperative initiatives such as Releva can be interpreted as multi-actor arrangements in which cooperatives, advisory services, and new entrants jointly coordinate resources and knowledge to facilitate farm establishment.

Seen together, the territorial evidence and the practical experience underline the cooperative's potential intermediary role in linking access to land with the conditions needed for viable new farming projects.

This kind of arrangements present several elements that may contribute to strengthening generational renewal processes. First, comprehensive support systems that combine technical, financial, and organizational assistance can help new farmers overcome early-stage barriers. Second, structured integration into agri-food value chains can provide access to coordinated production strategies, industrialization, processing and stable marketing channels. Third, opportunities for participation in cooperative governance may allow new entrants to contribute to leadership renewal and strategic decision-making within cooperative organizations. This, in turn, fosters the modernization of the cooperative's strategy, making the organization more attractive to younger generations.

The potential contribution to governance requires particular caution. Participation in training or membership does not by itself demonstrate greater influence in decision-making. Future research should examine whether younger members gain meaningful opportunities to engage in cooperative bodies, how organisations respond to their priorities, and whether these processes affect retention and leadership over time.

These findings suggest that embedding generational renewal within cooperative development strategies may represent a promising pathway for the long-term sustainability of Mediterranean agricultural systems.

The findings are exploratory and context-dependent. The study does not establish programme-attributable effects on farm entry, profitability, retention or governance. Comparative longitudinal evidence across cooperatives and territories would be needed to test transferability and identify which combinations of support are most effective. For practitioners and policymakers, the immediate implication is to design coordinated support pathways and evaluate them against clearly defined economic, social and organisational outcomes.

Keywords: Generational renewal; cooperative governance; young farmers; institutional entrepreneurship; agri-food value chains

Theme(s): Agri-Food Cooperatives; Public Policy and Institutional Support for Cooperatives

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8. Worker, Housing and Consumer Cooperatives

Research streams: Worker Cooperatives · Housing Cooperatives · Consumer Cooperatives

13 contributions

Times of Polarization: The Dark Side of Affect Within Alternative Organizations

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Abstract

Background

Alternative organizations seek to challenge dominant modes of organizing by embedding alternative principles of ownership, governance, authority, and relationality into organizational life (Parker et al., 2014; Vijay et al., 2025). Worker cooperatives constitute a particularly salient expression of alternative organizing, as members are simultaneously workers, owners, and participants in democratic decision-making, and have provided an important empirical setting for research on workplace democracy, self-management, organizational dualities, and alternative forms of relationality (Ashforth & Reingen, 2014; Huber & Knights, 2023; Kokkinidis, 2015). Yet putting alternative principles into practice remains difficult. Alternative organizations remain entangled with the dominant arrangements they seek to challenge and recurrently experience struggles over organizational purpose, strategy, democratic participation, and the enactment of alternative principles (Parker et al., 2014; Shanahan, 2025; Vijay et al., 2025). These difficulties are especially relevant for cooperatives, where tensions can contribute to processes of degeneration and the erosion of democratic and alternative practices (Amon, 2026; Shanahan, 2025).

Existing research has increasingly examined how alternative organizations navigate such tensions through relational and affective processes. Close interpersonal ties, democratic participation, and practices grounded in responsibility and care can help members sustain relationships across disagreement and preserve plurality over time (Ashforth & Reingen, 2014; Friedrich & Lüthy, 2025; Huber & Knights, 2023). Similarly, emerging research on affect in alternative organizations has primarily emphasized its generative and reparative potential, showing how affective dynamics can facilitate organizational learning, collective action, and the navigation of tensions (Friedrich & Lüthy, 2025; Vijay et al., 2025). Yet affect is not necessarily reparative. Organizational research increasingly recognizes that emotions may also intensify interpersonal and intergroup conflict (Bradley et al., 2024; Zietsma et al., 2019), while the phenomenon of affective polarization—the growing emotional distance between ingroups and outgroups—has been studied predominantly in political and partisan contexts rather than within organizations (Iyengar et al., 2019). However, despite growing calls to examine polarization as an organizational phenomenon (Bednar et al., 2025), we still know comparatively little about how affective polarization develops within organizations and how organizational arrangements themselves may become implicated in its escalation.

Aims

Accordingly, this study asks: *How do the constitutive properties of alternative organizations turn from resources for navigating tensions into amplifiers of affective polarization?* We address this question through the study of escalating conflict within a Spanish not-for-profit worker cooperative in the renewable energy sector. We conceptualize affective polarization as an organizational process through which disagreements become increasingly charged with negative affect, producing growing emotional distance between groups and progressively transforming how members interpret one another, interact, and engage with organizational governance mechanisms. To capture this process, we mobilize Portocarrero et al.'s (2025) distinction between emotions as intense and relatively short-lived reactions to particular events, moods as more diffuse affective states that constitute the background of everyday experience, and sentiments as more stable orientations of liking and disliking toward particular people, groups, or objects.

Methods

We build on a longitudinal organizational ethnography conducted between June 2024 and June 2026. The first author became closely embedded in the cooperative's everyday organizational life, including an immersive period from November 2024 to March 2026. The dataset comprises 43 weeks of fieldwork, approximately 480 hours of participant observation rendering 550 pages of fieldnotes, 70 semi-structured interviews, and s7 focus groups. Particularly important was an external mediation process initiated by the cooperative to address escalating internal tensions. The first author observed the six mediation sessions and followed how members subsequently interpreted and responded to them in everyday organizational life. Methodologically, we adopt an affective ethnographic approach (Gherardi, 2019), attending not only to members' verbal accounts but also to embodied reactions, emotional expressions, atmospheres, avoidance patterns, changing interactional practices, and shifts in the affective tone of collective spaces.

Data were analyzed abductively and processually. We used temporal bracketing to divide the ongoing stream of organizational events into analytically meaningful periods and examine how dynamics unfolding in one phase shaped the emergence of the next (Langley, 1999; Langley et al., 2013). Through repeated comparison of events, interactions, and changes in affective dynamics across the empirical timeline, we reconstructed the escalation of conflict across five phases, identifying what we term as the affective cycle of polarization. In Phase 1, disagreements around politically and morally charged issues, including a proposal concerning humanitarian support for Gaza and an internal abuse-of-power conflict, triggered intense emotions of anger and fear. Because the cooperative lacked centralized hierarchical authority and strategic decisions required collective deliberation, these disagreements entered the organization's democratic spaces and remained unresolved. In Phase 2, recurrent conflicts caused episodic emotions to accumulate into a pervasive background mood of distress and irritation. Members increasingly avoided sensitive conversations, informal collective spaces eroded, and everyday interactions became more defensive. Over time, recurrent affective experiences began to sediment into more durable sentiments of mistrust, panic, and hatred.

Results

Phase 3 appeared temporarily to interrupt this trajectory. Seeking to repair relationships, members hired external mediators and participated in six facilitated sessions structured around conflict resolution, deliberation, non-violent communication, and care. These encounters temporarily generated hope and empathy and opened moments in which members could again imagine reconciliation. However, these emotions remained episodic. New conflicts in everyday organizational life repeatedly undermined progress made during mediation, and the contrast between hope inside facilitated spaces and renewed conflict outside them intensified members' disappointment.

In Phase 4, the collapse of mediation consolidated the affective cycle. Hope and empathy disappeared, while disappointment joined already sedimenting sentiments of mistrust, panic, and hatred. Crucially, care itself became reinterpreted. Whereas it had previously constituted a genuine relational resource, members increasingly interpreted the other group's conciliatory behaviour and engagement with mediation as strategic and insincere. Failed attempts at care were no longer understood as part of an imperfect collective effort but as evidence of the other group's bad faith. Members increasingly concluded that coexistence was impossible.

This transition generated three relational mechanisms of polarization: strategizing, instrumentalizing, and imposing. Members began meeting separately to coordinate positions and assess the balance of organizational power; formal governance arenas, including assemblies and the board of directors, became increasingly instrumentalized to advance group-specific objectives; and both groups attempted to impose their preferred organizational direction. In Phase 5, these dynamics culminated in organizational fragmentation. Following highly conflictual assemblies, disciplinary actions, and contested governance decisions, ten members associated with one group left the cooperative, representing approximately 40 percent of its membership. Their departure effectively dissolved the polarized two-group configuration,

after which the remaining members began rebuilding collaborative practices and creating new internal democracy and conflict-management mechanisms.

Discussion

Our findings show that affect does not merely accompany organizational polarization but actively mediates the transformation of organizational tensions into polarized coexistence. Crucially, this process was amplified by characteristics that prior literature frequently associates with the capacity of alternative organizations to navigate disagreement constructively. Reduced hierarchy and distributed authority support self-determination and democratic participation (Slade Shantz et al., 2020), yet in our case they also limited the possibility of authoritatively containing escalating disputes. Democratic governance created arenas for collective deliberation, but once conflict became affectively charged these spaces could be entered strategically and instrumentalized for group-specific purposes. Finally, an ethos of care can sustain plurality and relationships across disagreement (Friedrich & Lüthy, 2025), yet strong expectations of care also heightened the consequences of its perceived failure. When conciliatory efforts repeatedly broke down, members increasingly interpreted these failures as betrayal and evidence of bad faith. The organizational properties that initially sustained relational closeness and democratic collaboration thus progressively became implicated in the escalation of conflict.

Contributions and Implications

Overall, our study makes three contributions. First, we contribute to research on alternative and cooperative organizing by specifying conditions under which horizontality, democratic governance, and care become sources of vulnerability rather than resources for tension navigation (Friedrich & Lüthy, 2025; Vijay et al., 2025). In doing so, we extend research on cooperative degeneration by identifying an affective pathway to fragmentation, complementing explanations centred primarily on governance, commercialization, scale, and organizational design (Amon, 2026; Shanahan, 2025).

Second, we contribute to research on affect in organizations (Bradley et al., 2024; Zietsma et al., 2019) by offering a processual account of how distinct affective elements interact over time. Rather than treating affect as a static or undifferentiated force, we show how episodic emotions accumulate into organizational moods and sediment into durable sentiments, which subsequently condition interpretation and action (Portocarrero et al., 2025). This allows us to explain how fleeting emotional episodes can progressively generate a self-reproducing affective environment.

Third, we contribute to emerging research on polarization in management and organization studies (Bednar et al., 2025) by uncovering the affective dynamics through which polarization is generated from within organizations. Whereas affective polarization has primarily been theorized and studied in societal and partisan settings (Iyengar et al., 2019), our process model links individual affective experiences with collective and organizational-level mechanisms, showing how polarization becomes enacted through both everyday relationships and formal governance structures.

Practically, our findings suggest that democratic governance and care should not be assumed to automatically de-escalate conflict. Cooperatives may require explicit mechanisms capable of preventing disagreements from becoming affectively entrenched, protecting deliberative spaces before trust collapses, and recognizing when practices intended as care begin to be interpreted through suspicion. This is particularly consequential in worker cooperatives because close relational ties, democratic participation, ownership, and strong value commitments can increase both members' attachment to the organization and the affective stakes of disagreement (Jussila et al., 2012; Pierce et al., 2001).

Keywords: Worker cooperatives; Alternative organizing; Affective polarization; Ethnography

Theme(s): Cooperative Governance and Management; Worker Cooperatives

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A special cooperative type for elderly people in Hungary: the public-interest pensioner cooperative

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Abstract

In Hungary, provisions governing public-interest pensioner cooperative—a special type of cooperative—came into force on July 1, 2017 in the Hungarian Cooperative Act (Act X. of 2006 on cooperatives). By introducing this type of cooperative, the Hungarian legislature sought to enable elderly people to work flexibly within the cooperative's protected framework and to enjoy other non-financial benefits. Based on the published results, it is clear that introducing this type of cooperative was a good decision. The presentation addresses the economic and social context that gave rise to public-interest pensioner cooperatives in Hungarian law. It briefly outlines the problems, challenges, and needs to which the legislature responded by introducing pensioner cooperatives. This analysis aims to present the main special rules governing public-interest pensioner cooperatives in Hungarian law using a legal-dogmatic approach, and to describe relevant practice through empirical analysis. A key element in the analysis of the relevant legislation is the examination of the concept of a pensioners' cooperative. This concept provides the fundamental basis for the special rules governing pensioners' cooperatives. It clearly and unambiguously distinguishes pensioners' cooperatives from other types of cooperatives by defining their specific membership and the complex activities carried out on their behalf. In addition, the special rules governing their establishment and operation are presented. The analysis also describes the operational mechanism of pensioners' cooperatives, highlighting how such cooperatives can create employment opportunities for their members under a flexible set of conditions. A key element of the operation of pensioner cooperatives is the members' personal contribution, which is fulfilled through their performance of work within the cooperative. This personal contribution constitutes the members' active participation in the cooperative's activities. Another key area of analysis is the property law regulation of pensioners' cooperatives. Regarding property law rules, the analysis addresses fundamental rules not exclusively linked to the type of pensioners' cooperative but applicable to any cooperative; at the same time, they are particularly relevant to establishing and operating a pensioners' cooperative. The presentation also outlines property law rules that apply specifically to pensioners' co-operatives and relate to their special membership and purpose. In this regard, the regulations governing the special reserve fund, which a pensioners' cooperative have to establish, are presented in detail as a fundamental characteristic of this type of cooperative. Given that pensioner cooperatives are subject to specific and more favourable tax and social contribution rules than those generally applicable to enterprises, the analysis also provides a brief overview of these provisions. These provisions are particularly relevant because the favourable tax and social contribution treatment constitutes a significant operational advantage and a key regulatory feature of pensioner cooperatives. In addition to presenting the specific regulations governing pensioners' cooperatives, the analysis examines the practical experience gained to date. The economic results relating to their operation are presented, as well as the practical benefits generated by the operation of pensioners' co-operatives. In this section, the analysis examines the apparent benefits of pensioners' co-operatives for their members, as well as the advantages their operation brings in employment and other areas. The analysis also presents some case studies on the operation of pensioners' co-operatives. In addition, the analysis outlines the experiences prompting the legislator to amend and further develop the relevant regulations.

As a result, the analysis highlights the key regulatory features underpinning the operation of pensioner cooperatives. It also presents the main economic and social outcomes associated with pensioner cooperatives, as well as practical experience accumulated over nearly 10 years. The analysis aims to help make the Hungarian model of pensioner cooperatives known internationally as a best practice and,

potentially, to serve as a model for other countries to follow. The analysis is grounded primarily in a legal-dogmatic methodology, while the presentation also draws significantly on empirical research findings.

Keywords: public-interest pensioner cooperatives; Hungarian Cooperative Act, special cooperative regulation; flexibly work; non-financial benefits

Theme(s): Cooperative Law; Worker Cooperatives

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Worker Cooperatives in the ICT Sector: Governance, Motivations, and Challenges

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Abstract

Background

Worker cooperatives are increasingly recognised as a viable organisational model for promoting democratic governance, more member-oriented forms of work, and alternatives to shareholder-centred ownership (McCann & Berry, 2017; Morales Gutiérrez, 2004). They are governed by a set of internationally recognised cooperative values and principles established by the International Cooperative Alliance (ICA), including voluntary and open membership, democratic member control, member economic participation, autonomy and independence, education and training, cooperation among cooperatives, and concern for community (International Cooperative Alliance, n.d.). While platform cooperativism has received growing attention (Sandoval, 2020; Zhu & Marjanovic, 2021), information and communication technology (ICT) worker cooperatives remain underexplored in cooperative research (Honcharenko et al., 2019). This study contributes to cooperative research by examining how worker cooperatives operate within the ICT sector, with a focus on member motivations, governance practices, stakeholder engagement, impact measurement, and emerging challenges. Building on earlier published work (Scholten et al., 2026), this extended analysis places greater emphasis on qualitative insights from cooperative members to better understand how democratic and participatory principles are enacted in practice.

Methods

We compiled a dataset of 76 cooperative ICT businesses and gathered data from members of 23 organisations through 17 semi-structured interviews and six written surveys. Organisations were identified through official directories, community-maintained lists, and referrals. The inclusion criteria required companies to operate within the ICT sector and either to be formally established as worker cooperatives or to show evidence of adherence to cooperative principles of democratic governance and, when possible, shared ownership. Data collection first validated relevant information about the organisations and subsequently explored members' motivations, democratic management, stakeholder engagement, and impact measurement practices. The interviews were recorded, transcribed and qualitatively coded; 15 motivation Q-sorts were analysed using Q methodology. For the present contribution, we revisit the interview material to provide greater qualitative depth on how members describe governance, participation, and organisational trade-offs, and interpret these findings in relation to cooperative principles and previous research on cooperatives.

Results

The findings show that members are motivated by a combination of ideological commitments and practical considerations. Many participants regard the cooperative form as consistent with their social and ethical values and as an alternative to perceived shortcomings of conventional forms of enterprise. At the same time, practical aspects are important, including greater involvement in the management of the business, autonomy, better working conditions, and work-life balance. A Q-methodology analysis of 15 participants identified three distinct viewpoints: an ideologically-driven, community-focused profile; an autonomy-seeking, quality-focused profile; and a newly aware, mission-supporting profile (Scholten et al., 2026). These profiles echo earlier findings by DeBalsi (2021) and further illustrate that members can arrive at and remain committed to cooperative businesses through different combinations of ideological and practical motivations.

Democratic governance is widespread across the organisations studied, although the specific practices differ considerably. Most participating organisations practise direct democracy, frequently relying on consensus-oriented decision-making, while others use indirect forms of democratic management or combinations of direct and indirect mechanisms (Scholten et al., 2026). The qualitative material shows that democratic participation does not necessarily imply involving every member in every decision. Several organisations distribute decisions according to who is affected, areas of expertise, or dedicated groups and committees, while retaining collective control over consequential decisions. This can help reconcile broad participation and ownership of decisions with the time and coordination required for collective decision-making. Some interviewees explicitly described adapting these mechanisms as their organisations grew. The findings therefore illustrate how ICT worker cooperatives seek to sustain meaningful workplace democracy while distributing decision-making in ways that allow them to operate effectively.

Stakeholder engagement also extends beyond worker-members. The organisations interact with customers, communities, other cooperatives, and other stakeholders in ways that frequently reflect their broader social orientation. Systematic impact measurement, however, remains limited. Of the 23 organisations, three reported formal impact measurement, seven used informal forms of assessment, ten reported no impact measurement, and the issue was not discussed with three. Interviewees associated the limited use of formal approaches with their small scale, lack of time and resources, and difficulties identifying meaningful measures of impact. Importantly, limited measurement does not imply limited concern for impact. Several organisations incorporate social or environmental considerations directly into decisions about which clients and projects to accept, pricing, technology choices, and other organisational practices.

An additional finding concerns the relationship between legal form and cooperative practice. Of the 76 ICT businesses in the dataset, 41 (53.9%) were formally incorporated as worker cooperatives, whereas 35 (46.1%) operated under other legal forms: 31 as private limited companies, three as limited liability partnerships, and one as an association. These latter organisations can be considered *de facto* rather than *de jure* cooperatives insofar as they operate according to cooperative principles, particularly democratic governance and, where applicable, shared ownership, despite not being legally incorporated as cooperatives (Scholten et al., 2026). This distinction has been previously discussed in the cooperative literature: García-Gutiérrez Fernández and Lejarriaga Pérez de las Vacas (1996) explicitly refer to worker cooperatives *de derecho* and *de hecho* (de jure and de facto, respectively), while Heath (2025) similarly notes that cooperative ownership and governance can be implemented through partnerships or conventional corporate forms. Conversely, the literature on cooperative law has documented the opposite phenomenon of false or pseudo-cooperatives that adopt the cooperative legal form without actually operating according to cooperative principles (García Jiménez, 2018). Together, these phenomena show that legal form and substantive cooperative practice do not necessarily coincide. Restricting empirical research to organisations with formal cooperative status may therefore overlook businesses that deliberately organise themselves according to cooperative principles while using another legal form. Conversely, identifying such de facto cooperatives requires clear evidence of the governance and ownership practices that justify considering them cooperative in practice. The distinction has implications for how cooperative activity in emerging sectors is identified, studied, and potentially recognised and supported.

Discussion

Overall, the findings highlight both the potential and the constraints of worker cooperatives in the ICT sector. These organisations demonstrate that democratic ownership and management can be applied in technology-intensive and knowledge-intensive businesses. They also reveal practical challenges related to decision-making, organisational growth, stakeholder engagement, and impact measurement. The study contributes to cooperative research by bringing an underexplored sector and by providing empirical evidence on how cooperative principles are enacted in practice. It also identifies two areas deserving further attention: why systematic impact measurement remains uncommon and how cooperative

businesses should be identified when legal form and cooperative practice do not coincide. These findings can inform future research into worker cooperatives in emerging sectors and contribute to discussions about how cooperative enterprises can be recognised and supported in increasingly digital economies.

Keywords: worker cooperatives; ICT sector; workplace democracy; governance; impact measurement

Theme(s): Cooperative Governance and Management; Worker Cooperatives

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Reconnecting with good food – Drivers for consumer engagement in food cooperatives in Germany

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Abstract

Background

In recent decades, the globalization of food systems has resulted in a highly concentrated retail sector. In Germany, four major retail groups control around 75% of the market (Monopolkommission, 2025), dictating prices for farmers and creating opaque supply chains. A counterbalance to these industrialized, de-localised systems are so-called Alternative Food Networks (AFNs) (e.g., Jarosz, 2008; Rosol, 2020). AFNs tend to be locally embedded, focusing on the small-scale, sustainable provision of high-quality organic food. Operating within ethical frameworks of solidarity and civic engagement, these initiatives seek to shorten the relational distance between producers and consumers, thereby restoring transparency and trust along the value chain. Prominent examples of AFNs discussed in the literature encompass community gardens, farmers' markets, community-supported agriculture (CSA), and consumer food cooperatives.

Within this context, this study focuses on a specific model of food cooperatives: the participatory supermarket (Gruber et al., 2026; Menke et al. 2026). Prioritising local, organic, and fair-trade products, these cooperatives strive to create alternative trading structures that guarantee fair producer margins alongside feasible consumer prices. Structurally, these supermarkets operate under collective member ownership and democratic control. Members receive exclusive shopping privileges in exchange for a mandatory labour contribution of approximately three hours every four weeks. By engaging in daily operations and community-building, members transform the supermarket into a social infrastructure rather than a mere retailer. Inspired by the Park Slope Food Coop in New York, these urban initiatives have recently gained traction across Europe. Following the opening of La Louve in Paris (2016), similar cooperatives emerged across France, Belgium, Austria, Italy, Spain and Germany (e.g., ICA 2021; Giacchè & Retière, 2019).

Aims

Given this unique, high-commitment model, this study aims to understand consumer engagement in AFN by exploring the underlying motivations for engagement in participatory supermarkets in Germany. The research seeks to identify the primary drivers of such participation. Ultimately, these insights are intended to foster the resilience of existing cooperatives and facilitate the establishment of new ones.

Methods

Data were collected in mid-2025 via an online member survey across three participatory supermarkets in Munich, Berlin and Cologne (*N* = 781). The sociodemographic profile reveals a predominantly female (69%), highly educated (72% holding university degrees) and financially secure cohort, with nearly two-thirds reporting a net monthly household income above €2,600. Demographically, the sample skews older (>50% aged 51 or older) and largely comprises small households (one to two persons), with 80% having no children under 18 residing at home.

To operationalize consumer motivations, this study developed a framework grounded in existing literature (Zoll et al., 2018; Holcomb et al., 2012; Seyfang, 2008) and supplemented by empirical insights from a prior shopping diary study with members of the respective supermarkets (von Schönfeldt et al., 2026). This

categorization comprises four primary categories: *product-related, self-oriented, community-oriented, and socio-ecological drivers*. Descriptive statistics were applied to closed-ended items, rated on a 5-point Likert scale (1 = strongly disagree, 5 = strongly agree), to determine the average agreement (M) across the predefined motivational categories.

Results

The following results are presented in descending order of their overall category means, beginning with the strongest driver of member engagement.

Product-related motives represent the strongest overall driver for member engagement (M=4.5). Members highly prioritize the availability of local and organic products (M=4.5-4.7) and transparency regarding the origin of their food (M=4.6). While high product quality is also essential (M=4.4), general product variety (M=4.1) is considered slightly less critical, indicating a clear preference for ethically sourced, high-quality food over mere abundance.

Socio-ecological motives also rank highly among member priorities (M=4.3). Participation is strongly fueled by macro-level goals like advocating sustainable trade (M=4.6) and environmental protection (M=4.6). Interestingly, the mere act of volunteering (M=3.6) is viewed as less important than the tangible ecological impact achieved through the cooperative.

Within *community-oriented motives* (M=4.1), a clear distinction emerges between systemic solidarity and personal socialization. Members are highly motivated by solidarity-based aspects, showing peak agreement for supporting the cooperative concept (M=4.7), ensuring fair producer remuneration (M=4.7), and supporting the local economy (M=4.6). Conversely, direct interpersonal exchange, such as producer-consumer or member-to-member interaction (M=3.2–3.6), plays a subordinate role.

Self-oriented motives show the lowest overall category mean and the highest internal variance (M=4.0). While members express immense trust in the cooperative concept (M=4.7) and a strong desire to do something meaningful (M=4.6), tangible personal benefits are largely irrelevant. Most notably, the expectation of saving money (M=3.0) represents the absolute lowest motivational factor across the entire survey.

Discussion

The survey results demonstrate that consumer engagement in participatory supermarkets in Germany is primarily driven by altruistic and quality-oriented values rather than economic self-interest. Members view their mandatory labour not as a transaction for cheaper groceries, but as an active investment in a sustainable, values-based food system. The striking irrelevance of financial savings (M=3.0) can be explained by the members' socio-demographics: predominantly highly educated, financially secure, and living in small, childless households. This is consistent with prior research demonstrating reduced price sensitivity and higher willingness-to-pay (WTP) for local and organic products within comparable consumer segments in Germany (e.g., Hasselbach & Roosen, 2015; Zoll et al., 2018).

These findings align, for example, with research on participatory supermarkets in Spain, where sociopolitical motives similarly outweighed economic ones among members (Sanz-Cañada et al., 2024). The same study also identifies the socioeconomic homogeneity as a weakness, describing the membership base as largely restricted to medium- and high-income groups, with a high level of education. However, meta-analysis of worldwide studies on consumer behaviour in the context of sustainable food systems also indicates differences between countries or regions (e.g. Mustapa & Kallas, 2025). Overall, empirical research on this specific model remains particularly scarce in Germany and across Europe more broadly.

Contributions and Implications

While participatory supermarkets aim to mitigate supply chain injustices and promote universal food security, participation seems to remain restricted to a privileged milieu (highly educated, financially secure, without childcare duties). Other prominent AFN models like Community Supported Agriculture similarly

tend to attract a socioeconomically homogeneous membership (Parot et al., 2024). According to Parot et al. (2024), overcoming these exclusivity challenges requires targeted interventions; promising solutions include sliding-scale pricing as an emancipatory action and establishing equal partnerships with organizations representing low-income households. Despite ongoing efforts by cooperatives to address these barriers (e.g. solidarity work shift, social pricing for members with lower incomes) structural challenges to inclusivity remain, highlighting the need for further interventions to scale the model and enhance access to high-quality local and organic food for all segments of society.

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Keywords: alternative food systems; food cooperatives; participatory supermarkets; consumer motivation; consumer engagement

Theme(s): Environmental and Social Sustainability in Cooperatives; Consumer Cooperatives

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Beyond degeneration – lived experiences of membership, decision-making and goals in worker cooperatives

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Abstract

Background

The degeneration thesis – which describes the process in which alternative organisations "will have to adopt the same organizational forms and priorities as capitalist businesses in order to survive" (Cornforth, 1995, p. 488) – has been a popular theoretical lens for analysing how and why cooperatives fail to uphold their principles and practices under capitalism. The thesis has been widely discussed and researched (Amon, 2026). In this article we examine the strengths and weaknesses of the thesis in understanding the organisational realities and lived experiences of people within worker cooperatives and therefore expand critical discussions on the premise of the theory.

The thesis has been criticised for determinism (Byrne, 2022) and spurred plenty of evidence that degeneration can be avoided and resisted (Bretos et al., 2020; Cornforth, 1995; Diefenbach, 2019; Langmead, 2017; Shanahan, 2024; Storey et al., 2014; Stryjan, 1994; Unterrainer et al., 2022). These contributions offer valuable insight into the richness in cooperative organising and how worker cooperatives can uphold their emancipatory potentials despite threats of degeneration. Nevertheless, what has not been discussed to the same extent is how well the theory can grasp the ethics and aims of worker cooperatives and how these relate to their organisational structures and practices. In other words, we call for examination of the analytical usefulness of the degeneration thesis in understanding how worker cooperatives are organised and for what purpose.

Methods

Using qualitative methods in an abductive research process, we analyse Finnish worker cooperatives and their goals, membership management and decision-making practices. We have conducted 17 semi-structured interviews with leadership and other non-member and non-leadership employees from 11 worker cooperatives. While only leadership were interviewed at first, degeneration tendencies in almost all the studied cooperatives pushed us to critically examine our sources and to expand what kinds of cooperative participants we interviewed. Therefore, we interviewed non-member and non-leadership employees from three of the cooperatives. Importantly, the accounts from these interviews aligned with the previous interviews with cooperative leadership. Through reflexive analysis (Alvesson & Kärreman, 2011) we engage our data and theoretical lenses in a dialogue. Through this process we construct five types of cooperatives to illustrate the variety of organisational forms.

Results

The studied cooperatives are organised in various ways, but almost all present constitutional and/or organisational degeneration tendencies (Unterrainer et al., 2022). However, we argue that degeneration should be analysed in light of the cooperatives' goals to better understand the meaning of their organising and how it is experienced by those working and engaging in the cooperatives.

We present five types of worker cooperatives, the ideal cooperative, the degenerated cooperative, the two kinds of common cooperative and a special case cooperative, to illustrate the diversity of organising structures among worker cooperatives. The first two represent the ideal types of worker cooperatives

relating to the degeneration thesis, one that is not being affected by degeneration at all and the other fully degenerated. We find these cases in our sample, but they do not represent the norm. Hence, we present the so-called common cooperatives in our sample, ones that show degeneration tendencies regarding constitution and/or organisation, but not in terms of goal degeneration. These cooperatives help us illustrate the analytical limitations of the degeneration thesis. Lastly, the special case cooperative represents a sort of wild cooperative that further illustrates the complexities of analysing degeneration in worker cooperatives.

Contributions and Implications

The degeneration thesis continues to provide an important theory for analysing the threats to alternative organising, but we highlight the limitations it has in making sense of the meaning behind worker cooperatives' practices and organisational structures. We contribute by critically examining the thesis in empirical settings and expand the perspectives on the purpose of worker cooperatives and their practices to members and employees.

Keywords: Worker cooperatives; degeneration thesis; membership; decision-making

Theme(s): Cooperative Governance and Management; Worker Cooperatives

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Between Social and Collaborative Housing: a Cooperative Context

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Abstract

Background

In European welfare regimes, housing increasingly emerges as a critical site of social inequality, revealing the limits of both market-based provision and traditional social housing systems. While social housing plays a key redistributive role by guaranteeing access to affordable dwellings for vulnerable groups, it often reproduces hierarchical governance structures and passive forms of inclusion. Conversely, collaborative housing promotes active resident participation, mutual care, and shared responsibility, yet frequently remains accessible only to socially and economically advantaged groups. This structural tension becomes particularly visible in contexts where collaborative housing is employed as an instrument for social inclusion within social housing systems based on welfare state principles. Social cooperatives constitute a strategic institutional space in which these contrasting logics of social and collaborative housing are negotiated.

Aims

Building on the case study of a social cooperative in Bolzano (Italy), this research examines how cooperatives mediate the tension between state-based and community-based housing provision. The study aims to:

1. analyse how cooperative governance enables hybrid housing arrangements combining protection and participation;
2. explore how collaborative housing practices operate within structural constraints of welfare policies and housing scarcity;
3. assess the implications of these hybrid models for social inclusion, care, and citizenship.

Methods

The research adopts a qualitative, participatory case study. Data were collected through semi structured interviews with residents, cooperative workers, neighbours, healthcare and social professionals, and local civil society actors; participant observation within collaborative housing environments; and focus groups supporting collective reflection. Data were analysed through thematic analysis combined with grounded theory techniques, allowing concepts and interpretative categories to emerge inductively from participants' experiences. Visual analysis was applied to photovoice materials. Ethical considerations—particularly regarding voluntary participation and asymmetries of power in welfare-based housing contexts—were integral to the research process.

Results

The case findings show that collaborative housing initiatives function as hybrid dispositifs situated between social housing and co-living. On one hand, institutional partnerships with public bodies ensure affordability, legal compliance, and access for structurally vulnerable groups. On the other hand, everyday practices of shared decision-making, mutual support, and negotiated governance foster forms of social learning, empowerment, and relational care. However, tensions remain evident: participation is uneven, not all residents can or wish to engage to the same extent, and the cooperative must constantly balance care, autonomy, and organisational responsibility. Collaborative housing does not dissolve social inequalities but renders them visible and negotiable within controlled institutional settings.

Discussion

The study confirms that the relationship between social housing and collaborative housing should be understood as dialectical rather than substitutive. Social cooperatives act as mediating institutions that partially reconcile state-based welfare logics of protection with community-based logics of self--organisation. This mediation, however, is fragile and context dependent-. The results challenge idealised narratives of collaboration by demonstrating that resident participation itself requires resources, support, and continuous facilitation—particularly in contexts marked by vulnerability, ageing, migration, and precarity. At the same time, they expand social housing debates by reframing housing as a relational and educational practice rather than solely as a service.

Contributions and Implications

The research contributes to current debates in housing and cooperative studies by conceptualize collaborative housing within social cooperatives as a hybrid institutional form operating between state-based welfare provision and community-based governance. Empirically, it offers grounded evidence on how inclusion is produced through negotiated practices rather than predefined models within a cooperative setting. Practically, the findings inform policymakers, housing authorities, and cooperative actors on the conditions under which collaborative housing can complement—rather than replace—social housing. More broadly, the study positions housing as a key arena for rethinking social citizenship, care, and collective responsibility in affluent yet increasingly unequal regions.

Keywords: Social Housing; Collaborative Housing; Social Cooperatives; Social Inclusion

Theme(s): Housing Cooperatives

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Between Property and Social Function: Housing Cooperatives in Portugal

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Abstract

Background

The contemporary debate on housing cooperatives is situated within the broader context of the European housing crisis, characterised by increasing difficulties in accessing housing, the growing treatment of housing as a financial asset, and the insufficient supply of social and affordable housing. These circumstances highlight a tension between the economic dimension of housing and its social function, which is linked to the fulfilment of fundamental needs.

Within this context, housing cooperatives assume particular relevance as organisations pursuing a mutualistic purpose, aimed at meeting the housing needs of their members. In Portugal, their legal framework is established by the Portuguese Cooperative Code, approved by Law No. 119/2015 of 31 August, and Decree-Law No. 502/99 of 19 November, which governs housing and construction cooperatives.

One of the distinctive features of this legal framework is the recognition of two forms of housing ownership: individual ownership and collective ownership. This dual structure reflects different ways of articulating property ownership, cooperative members' rights, and the cooperative's mutualistic purpose, raising important questions concerning the social function of housing.

Aims

This paper examines the dual ownership structure of housing and construction cooperatives under Portuguese law, identifying the specific features of the individual and collective ownership regimes and their implications for the legal position of cooperative members.

It seeks to clarify how property ownership, the rights to use and enjoy dwellings, and members' participation in housing financing are organised under each regime. It also examines the influence of the cooperative relationship on the legal nature and content of the rights and contracts through which access to housing is secured.

The analysis further aims to identify the potential and limitations of each regime in ensuring that dwellings remain dedicated to the cooperative's mutualistic purpose and in contributing to the fulfilment of the social function of housing.

Methods

The research adopts a doctrinal legal methodology based on the systematic interpretation of Portuguese cooperative legislation and the relevant provisions of the Civil Code.

The analysis traces the historical evolution of the legal arrangements governing the allocation of cooperative housing, from the earliest statutes of cooperative building societies to the legislative consolidation of the individual and collective ownership regimes. It then examines the rules governing the transfer of ownership, the granting of rights to use and enjoy dwellings, housing financing, and the transfer and termination of cooperative members' rights.

Relevant legal scholarship and case law concerning the legal characterisation of transactions between cooperatives and their members are also considered, alongside recent studies on the legal framework governing housing cooperatives in Portugal and Spain (Meira, 2024; Merino Hernández, 2025; Morillas Jarillo, 2025).

The research is legal in nature and does not seek to empirically assess the effects of the different regimes on housing costs or the economic operation of cooperatives.

Results

Portuguese law allows housing and construction cooperatives to adopt the individual ownership regime, the collective ownership regime, or both, pursuant to Article 16 of Decree-Law No. 502/99.

Under the individual ownership regime, the cooperative transfers ownership of the dwelling to the cooperative member through a contract of sale. This transfer is subject to specific rules arising from the cooperative's mutualistic purpose, particularly regarding the determination of the purchase price, based on legally defined costs, payment by instalments, and restrictions on subsequent disposal.

The legal characterisation of this transaction has given rise to doctrinal debate concerning the autonomy of contracts concluded within the framework of cooperative activity. Nevertheless, the express statutory recognition of the contract of sale supports the contractual nature of the transfer, without excluding the specific features arising from the cooperative relationship (Barbosa, 2016). Once ownership has been transferred, the dwelling becomes part of the individual member's assets.

Under the collective ownership regime, by contrast, ownership of the dwellings remains vested in the cooperative. This arrangement does not constitute a form of co-ownership among members, since the cooperative's assets are legally distinct from the individual assets of its members.

The right to use and enjoy the dwellings may be granted through either a cooperative right of habitation or cooperative tenancy. The former constitutes a limited right in rem of enjoyment, governed by the special provisions of cooperative legislation and, subsidiarily, by the provisions of the Civil Code concerning rights of use and habitation. One of its distinctive features is the possibility of transfer, either inter vivos or upon death, under the conditions prescribed by law, notwithstanding the general rule that rights of use and habitation are non-transferable.

Cooperative tenancy, in turn, is based on a lease agreement, granting the cooperative member a right of a contractual nature. Its specificity arises from the coexistence of the landlord–tenant relationship and the cooperative membership relationship, without altering the legal nature of the lease.

The analysis also highlights the distinction between ownership of the dwelling, the right to use and enjoy it, and the cooperative member's financial participation. Within the framework of the cooperative right of habitation, the subscription and payment of participation securities are intended to finance the cost of the dwelling and do not confer ownership of the property upon the member. The price associated with the right of habitation constitutes a legally distinct payment from these financial contributions.

This distinction is particularly relevant upon termination of the cooperative membership relationship, especially in cases of voluntary withdrawal or expulsion of a member, since the different financial contributions are subject to distinct reimbursement rules (Meira, 2018).

The fundamental difference between the two regimes therefore lies in whether ownership of the dwellings is retained by the cooperative or transferred to its members, with significant implications for the subsequent transfer of the properties and their continued inclusion in the cooperative's assets (Meira, 2021).

Discussion

The findings demonstrate that the individual and collective ownership regimes represent two legally distinct ways of pursuing the same mutualistic purpose.

Under the individual ownership regime, cooperative activity ultimately results in the acquisition of the dwelling by the member. Although the transfer of ownership is subject to specific legal rules, the dwelling ceases to form part of the cooperative's assets, while its subsequent transfer may remain subject to rights of first refusal and other applicable statutory restrictions.

Under the collective ownership regime, the separation between ownership of the property and the cooperative member's right to use and enjoy it allows the dwelling to remain within the cooperative's assets, regardless of changes in the member entitled to occupy it. This arrangement has the potential to ensure that dwellings remain dedicated to meeting the housing needs of cooperative members over time.

However, this potential does not necessarily mean that collective ownership guarantees greater housing affordability or absolute protection against speculative practices. Such questions would require further empirical assessment.

The fundamental distinction between the two regimes does not, therefore, amount to an opposition between private ownership and cooperative identity, since both are expressly recognised under Portuguese law. The central doctrinal legal issue lies in the relationship between cooperative membership and the traditional categories of civil law.

The cooperative right of habitation demonstrates that a limited right in rem of enjoyment may be subject to significant specific rules without constituting a separate category of right in rem. Similarly, cooperative tenancy retains the contractual nature of a lease, notwithstanding its integration into a mutualistic relationship.

Contributions and Implications

This study contributes to a systematic understanding of the dual ownership structure of housing and construction cooperatives in Portugal, clarifying the differences between individual and collective ownership and the legal consequences of the various arrangements through which dwellings are allocated to cooperative members.

Its main contribution lies in identifying three legally distinct dimensions — ownership, use and enjoyment, and financing — whose separation is essential to understanding the legal position of cooperative members. This distinction prevents collective ownership from being confused with co-ownership among members and financial contributions from being interpreted as payments intended for the individual acquisition of dwellings.

The research also provides a basis for reflecting on the adequacy of the legal framework governing housing and construction cooperatives in addressing contemporary challenges. In this context, particular attention should be paid to the stability of cooperative assets, the protection of members' rights, the financial consequences of withdrawal from the cooperative, and the clarification of the legal arrangements governing the use and enjoyment of dwellings. These issues have been examined in Portuguese legal scholarship (Meira, 2018, 2024) and are also addressed in recent studies on the legal framework governing housing cooperatives in Spain (Merino Hernández, 2025; Morillas Jarillo, 2025).

Without establishing a legal hierarchy between the two regimes, the analysis identifies a particular potential of collective ownership to preserve dwellings within the cooperative's assets and enable their successive use by different members.

The study concludes that the contribution of cooperatives to the social function of housing depends on the interaction between the ownership regime adopted, cooperative members' rights, and the mechanisms governing the financing and transfer of dwellings. The distinctive feature of the Portuguese model thus lies in the adaptation of traditional civil law categories to the specific requirements of the cooperative relationship.

Keywords: Housing cooperatives; Individual ownership; Collective ownership; Cooperative right of habitation; Social function of housing

Theme(s): Cooperative Law; Housing Cooperatives

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Social economy and wage opt-outs: evidence from collective-agreement non-application in Spain, 2013–2025

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Abstract

Background

The classical theory of the labour-managed firm (Ward, 1958; Vanek, 1970) predicts that worker-owned firms adjust pay before employment in the face of negative shocks, because members bear the consequences of both decisions. The evidence supports it: Pencavel, Pistaferri and Schivardi (2006), with a matched employer–employee panel for Italy in 1982-1994, find that cooperatives paid wages 14 per cent lower on average, with more volatile pay and less volatile employment; Burdín and Dean (2009), with the complete population of cooperatives and capitalist counterparts in Uruguayan social-security records from April 1996 to December 2005, report that the two types differ markedly in their adjustment to shocks. For Spain, Garcia-Louzao (2021) compares the non-member employees of those firms with similar employees of conventional firms and finds greater employment security, while wages and working time respond to the cycle equally, a pattern he attributes to the common constraint of the labour code and collective bargaining. That reading points to an unexamined margin: the formal decision of a firm to suspend the wage floors of its agreement, the inaplicación or descuelgue of article 82.3 of the Workers' Statute, which the 2012 reform (Real Decreto-ley 3/2012) generalised. Every opt-out must be deposited in the public register of collective agreements (REGCON), which makes the mechanism observable at firm level. The question matters for a second reason: Ley 5/2011 groups under the label social economy forms with very different governance, cooperatives and labour societies (sociedades laborales), where residual control lies with members who are the workforce, and associations and foundations, where it lies with those who are not the employees.

Aims

We ask whether worker-owned forms opt out at the same rate as capitalist firms, and whether their propensity differs from that of social-economy organisations. Five hypotheses are tested. H1: cooperatives and labour societies opt out more than capitalist firms, because cutting pay to preserve activity is more an intra-group decision than a conflict between groups. H2: associations and foundations opt out less, because the cost falls on employees with no gain for those who decide. H3: worker-owned forms target the wage level rather than working time more often than capitalist firms. H4: their opt-outs close more often by direct agreement and less often through mediation or arbitration, and the opposite holds for mission-driven forms. H5: foundations in the orbit of the public sector opt out least of all. Three exploratory questions, formulated after inspecting the data, ask which agreements cooperatives opt out of (P1), when they sign (P2), and whether the agreed increase predicts how often an agreement is opted out of (P3).

Methods

We use the complete administrative register of collective-bargaining deposits (REGCON) of the Ministry of Labour and Social Economy: 51 quarterly extracts from the first quarter of 2013 to the third of 2025, with 40,416 firm-level agreement deposits and 13,443 opt-outs affecting 545,342 workers. Entities are classified by the legal-form marker in the title they enter in the register, with rules that distinguish cooperatives, labour societies, associations and foundations; the residual is split between a public sector — identified from the ownership fields and name keywords, reported apart and excluded from the comparisons — and the capitalist firms. Our measure is the ratio of opt-outs to firm-agreement deposits by category: a relative propensity, not an absolute rate, since the register does not observe the population of active firms.

Equality of ratios is tested with chi-square statistics on deposits, which correspond to some 8,862 firm keys derived from the titles, so p-values overstate precision and are read as descriptive. Later sections add the procedure, the signing representation, foundation ownership, the agreement opted out of — resolved for 97.9 per cent of the opt-outs — the signature date and the characteristics of the 1,563 sectoral agreements with at least one deposit, aggregated to agreement–year cells for a Poisson model with agreement and year fixed effects.

Results

Relative to capitalist firms (12,529 opt-outs against 33,379 firm agreements, a ratio of 0.375), labour societies file at 1.433 — 172 opt-outs against 120 deposits, 3.8 times the capitalist rate and the highest of all — and cooperatives at 0.734, or 2.0 times. Foundations file at 0.158, 0.42 times that rate, and associations at 0.356, indistinguishable from capitalist firms. Homogeneity across the five categories is rejected ($\chi^2(4) = 330.9$, $p < 10^{-69}$): cooperatives and labour societies differ from capitalist firms at $p < 10^{-22}$ and $p < 10^{-32}$, foundations in the opposite direction at $p < 10^{-19}$, and associations do not differ ($p = 0.59$). As a block, the four forms file 838 opt-outs against 1,883 agreements, 1.19 times the capitalist rate ($p < 10^{-4}$): a significant but modest difference that averages opposite behaviours, since cooperatives and labour societies together reach 2.3 times the capitalist ratio and associations and foundations 0.62 times. Wage level is the condition most frequently suspended in every category, somewhat more so in the worker-owned forms (92.0 and 93.0 against 86.8 per cent). The ordering survives six alternative specifications, including stratification by size (Mantel-Haenszel odds ratios of 4.2 for cooperatives and 2.6 for labour societies). Mechanisms differ only at the margin: between 81 and 96 per cent of opt-outs close by direct agreement in the consultation period, but associations and foundations resort to mediation or arbitration in 12.5 and 8.9 per cent of cases, three and four times the capitalist 3.0. Ad hoc committees under article 41.4 signed 79.7 per cent of labour-society opt-outs, 69.9 of capitalist ones and 46.7 of cooperative ones, and the former keep resorting to them even when large (63.6 against 22.9 per cent in the 50-249 band), whereas cooperatives negotiate with elected works councils more often than capitalist firms of the same size. Public foundations file 13 opt-outs against 238 agreements, 0.15 times the capitalist rate (H5), and private ones are bounded between 0.54 and 0.90 times that rate by the 216 deposits whose ownership the register does not identify. Finally, 63.2 per cent of cooperative opt-outs target agricultural agreements, against 3.5 of capitalist ones; two Valencian citrus agreements account for 192 of the 375, and cooperatives are 63 per cent of those opting out of them (P1). They sign before the harvest, year after year, but within those agreements cooperatives and capitalist firms sign in the same months ($p = 0.36$) (P2). The agreed increase does not predict use: the Spearman correlation across agreements is −0.02 ($p = 0.42$) and, in the agreement–year panel with fixed effects, the rate ratio of the increase in force is 1.02 (95 per cent CI: 0.91-1.14). What distinguishes the agreements opted out of is that they almost always contain their own opt-out clause: 89.6 against 79.3 per cent of capitalist targets, and 57.9 per cent of sectoral agreements with a clause were opted out at some point against 36.9 per cent of the rest (P3).

Discussion

Read by legal form, the results are consistent with Ward and Vanek and with Pencavel et al. (2006) and Burdín and Dean (2009): worker-owned forms opt out substantially more than capitalist firms. Disaggregation, however, shows that they reach that result by different routes and that only one supports the theoretical mechanism. The cooperative excess is sectoral: it belongs to Valencian citrus cooperatives whose members are farmers and whose affected workers are hired pickers and warehouse staff; their opt-outs are seasonal, recurrent, shared with the capitalist firms covered by the same agreements and unrelated to the agreed increase. Nothing in that pattern involves a transfer between a worker's present employment and their future pay: it is a recurrent practice of setting campaign wages below the sectoral floor in agreements that provide for it. Outside agriculture, cooperatives are not over-represented among those opting out of a given agreement, which is what Garcia-Louzao (2021) would lead one to expect for non-member employees and what the members' own position implies, since they fall outside the scope of collective agreements. Labour societies are that case: their rate is the highest and is concentrated in no

single sector or season, their worker-members are covered by the agreement being suspended, and even the large ones negotiate with ad hoc committees that, in a firm majority-owned by its workers, are committees of the owners.

Contributions and Implications

The paper contributes a new descriptive regularity on an unstudied margin: worker-owned forms suspend sectoral wage floors far more often, and publicly funded foundations far less. Two lessons follow. First, the social economy is not a single behavioural category on this margin: its worker-owned and mission-driven components move in opposite directions, and the aggregate comparison — a significant but modest 19 per cent — averages a multiple of 2.3 and a deficit of 38 per cent, and says nothing about any of its parts. The empresa social introduced by Ley 1/2026 into article 5 of Ley 5/2011, defined by its purposes and by the destination of results rather than by legal form, is consistent with this. Second, use of the opt-out appears to be governed less by the price of the agreement than by its institutions and by sectoral practice, which places it among the routinised uses of institutional flexibility rather than among the responses to shocks that motivated its generalisation in 2012.

Limitations

The denominator is firm-level bargaining activity, not the population of firms of each form, so the ratios measure relative and not absolute propensity; an external denominator remains the most important extension. Classification rests on the legal-form marker in the title, absent from 12-22 per cent of opt-out titles and from 27 per cent of the firm-agreement deposits of 2013, falling to 11-15 per cent from 2016. Foundation ownership is unknown for 216 of 780 deposits.

Keywords: worker cooperatives; labour societies; wage flexibility; collective bargaining; institutional opt-outs

Theme(s): Worker Cooperatives; Public Policy and Institutional Support for Cooperatives

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Engaging Consumers in Local Food Systems: Evidence from a Cooperative-Led Needs Assessment

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Abstract

Background

In the context of climate change, geopolitical instability, and growing social inequalities, food supply chains have increasingly been recognised as critical infrastructures for social and environmental resilience. Long and globalised agri-food chains have shown structural vulnerabilities, while local and short food supply chains have gained renewed attention as potential levers for sustainability, food security, and community empowerment. Consumer cooperatives occupy a strategic position within this transformation, acting as intermediaries between producers and consumers while being grounded in democratic governance and collective ownership. However, empirical evidence on how consumer needs, values, and participatory practices can effectively inform cooperative decision-making and local sourcing strategies remains limited.

Aims

This study presents the results of the first research phase of the RE-LOCI project, focusing on:

1. identifying consumers' needs, preferences, and expectations regarding local, sustainable food products;
2. analysing practices of member involvement in decision-making within consumer cooperatives, food coops, and fair-trade shops in Italy;
3. mapping and comparing good practices of local sourcing and short supply chains adopted by consumer cooperatives and food coops.

The overarching aim is to generate empirically grounded knowledge to support participatory and resilient food procurement models within consumer cooperatives.

Methods

The research adopts a mixed qualitative–quantitative design. A structured survey was conducted with approximately 500 members and customers of Koncoop, a consumer cooperative operating in Bolzano (Italy). The survey explored consumption patterns, attitudes towards local and sustainable products, willingness to participate in cooperative decision-making, and perceived barriers to local sourcing. In parallel, a qualitative mapping of good practices was carried out through the analysis of documented cases, semi-structured interviews with representatives of cooperative and solidarity-based retail initiatives, and comparative desk research. The analytical framework draws on literature on alternative food networks, cooperative governance, and participatory consumption.

Results and Discussion

The survey results tend to reveal a consumer demand for locally sourced products combined with environmental and social sustainability criteria, alongside an expressed willingness to support local producers even at higher prices, within clear affordability limits. The mapping of good practices shows a wide range of participatory mechanisms—from consultative surveys and assemblies to co-design of procurement criteria and participatory guarantee systems—alongside diverse operational models for short food supply chains.

The findings highlight the central role of consumers not only as end-users but as active agents in the governance of local food systems. Consumer cooperatives can act as platforms for collective intelligence, translating individual preferences into shared rules and procurement strategies. However, the research

also points to tensions between participatory ambitions and organisational constraints, such as logistical complexity, price sensitivity, and the risk of participation fatigue.

Contributions and Implications

This study contributes empirically to debates on alternative food networks and cooperative governance by providing large-scale consumer data combined with an in-depth mapping of organisational practices. It offers practical insights for consumer cooperatives seeking to strengthen member participation and local procurement without compromising economic sustainability. More broadly, the results inform policy and practice on how demand-side engagement can support the re-localisation of food systems and enhance their social and environmental resilience.

Keywords: Consumer Cooperatives; Short Food Supply Chains; Consumer Participation; Local Food Systems; Alternative Food Networks

Theme(s): Consumer Cooperatives

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Cooperative Governance: conceptual delimitation and legal relevance in worker cooperatives

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Abstract

Background

Co-operative governance raises legal and organisational questions that cannot be fully addressed through governance models developed primarily for investor-owned companies. Governance concerns not merely the efficient management of an organisation, but the manner in which decision-making power is allocated, exercised and controlled in accordance with the purpose that legitimises the organisation itself (Novkovic & Miner, 2015). In worker co-operatives, decision-making power does not derive exclusively from capital ownership, but from membership and participation in the co-operative activity. This creates a distinctive legal structure in which the person performing work may simultaneously be a co-owner of the enterprise, a participant in its governance and the beneficiary of legal protection. This specificity is particularly significant in occupational safety and health, where the conventional regulatory model is largely structured around the distinction between employer and worker. Although problems traditionally associated with corporate governance may also arise in large co-operatives (Vargas Vasserot, 2009), co-operative governance requires a conceptual approach adapted to the democratic and self-managed nature of the co-operative enterprise. The International Co-operative Alliance's Second Co-operative Principle, Democratic Member Control, provides an essential reference point, as it places effective member participation, democratic control and accountability at the centre of the co-operative model (International Co-operative Alliance [ICA], 2015).

Aims

This paper seeks to develop, through the case study of a large industrial worker co-operative, a legally grounded concept of co-operative governance consistent both with the ICA Co-operative Principles and with the distinctive legal nature of the worker co-operative. It examines how decision-making operates in practice in the field of occupational safety and health and how the co-operative model -in which worker-members participate in the governance of the enterprise while simultaneously benefiting from occupational safety and health protection- affects the allocation of decision-making powers and, ultimately, the attribution of legal responsibility.

Methods

The study adopts a qualitative legal research methodology combining a review of the relevant academic literature, doctrinal legal analysis and case-study analysis. The literature review focuses on co-operative governance, the ICA Co-operative Principles and the distinctive legal position of worker-members. The legal analysis examines the Spanish regulatory framework at State and Autonomous Community levels, with particular attention to co-operative law, occupational risk prevention legislation, the constitutional distribution of legislative competences and relevant Spanish case law concerning occupational accidents, the surcharge on Social Security benefits and criminal responsibility. This analysis is complemented by a case study of Tafalla Iron Foundry, S.Coop., a large industrial worker co-operative located in Navarre and part of the Mondragon Corporation. Drawing on the author's first-hand professional knowledge and experience within the co-operative, the case study examines its governance structure and the formal and informal mechanisms through which worker-members participate in occupational safety and health decision-making.

Results

The case study reveals a multi-layered governance structure in which democratic representation and organised professional management operate simultaneously. Tafalla Iron Foundry has approximately 700 workers, around 550 of whom are worker-members. Occupational safety and health governance extends across the Governing Council, Social Council, Management Committee, Occupational Safety and Health Committee, Health and Safety Representatives, area-level subcommittees and safety inspections, together with operational meetings, information sessions, reporting mechanisms, individual rights to raise concerns and the General Assembly. Internal rule-making is likewise subject to a participatory procedure involving representative, executive and membership-based channels. The case therefore demonstrates that self-management does not require every worker-member to participate personally in every operational decision. Rather, it requires effective mechanisms through which democratic authority may be exercised, channelled, delegated and supervised. Occupational risk prevention consequently operates not merely as an external technical function, but as part of a wider organisational culture of participation and collective responsibility.

The legal analysis identifies important tensions in the Spanish regulatory framework. Law 31/1995 on Occupational Risk Prevention formally applies to worker co-operatives, while expressly requiring account to be taken of the particularities deriving from their specific legal regime. Law 27/1999 on Co-operatives further reinforces this specificity by characterising the worker-member relationship as corporate and self-managed. However, the interaction between State occupational safety legislation and Autonomous Community co-operative legislation remains uneven, particularly where regional legislation does not contain an express provision governing occupational risk prevention. At constitutional level, Article 40(2) of the Spanish Constitution provides a common substantive mandate for the protection of health and safety at work, while the distribution of legislative competences requires the respective fields of State labour legislation and Autonomous Community co-operative law to be reconciled. This framework is particularly significant because the legal relationship through which worker-members perform work belongs primarily to co-operative law rather than labour law, without prejudice to the application of labour-law provisions expressly extended to them (Henrÿ, 2016).

A further difficulty concerns the attribution of legal responsibility. Worker co-operatives may choose through their bylaws the Social Security scheme applicable to their worker-members. Spanish case law demonstrates that this collective decision may produce different consequences for the surcharge on Social Security benefits, particularly where worker-members are affiliated to the Special Social Security Scheme for Self-Employed Workers (RETA). Thus, substantively similar occupational safety duties may lead to different liability consequences depending on the Social Security scheme selected by the co-operative. More broadly, the case law analysed indicates that legal responsibility cannot be attributed exclusively by reference to formal status or organisational office. What ultimately matters is the effective distribution of powers of direction, organisation, supervision and intervention, together with the information available to the person concerned and their practical capacity to prevent the relevant risk. Participation and responsibility are therefore connected, but they are not equivalent: democratic participation cannot justify an indiscriminate allocation of responsibility among worker-members.

The study identifies an important regulatory shortcoming. Although Spanish occupational risk prevention legislation formally extends protection to worker-members, the current framework does not sufficiently adapt concepts, duties and mechanisms developed around the conventional employer–employee relationship to the distinctive legal and organisational characteristics of worker co-operatives. Greater legislative precision is required regarding the identification of the relevant duty-bearer, the interaction between State occupational safety legislation and Autonomous Community co-operative law, the consequences of the Social Security scheme selected by the co-operative and the effects of distributed decision-making within a self-managed organisation. The absence of sufficiently specific rules in these areas contributes to legal uncertainty and reduces the predictability of both preventive duties and legal liability.

Discussion

Against this background, this paper proposes that co-operative governance be understood as the capacity of a co-operative, in the exercise of its powers of self-organisation and internal regulation, to establish - while safeguarding the rights of each individual member- formal and informal channels of participation through which the decision-making power inherent in co-operative membership can be effectively exercised and channelled. This concept is directly linked to the ICA's Second Co-operative Principle, Democratic Member Control. The distinctive feature of co-operative governance lies not merely in the formal existence of democratically elected bodies, but in the effective capacity of members to participate in setting policies and making decisions, elect representatives, hold them accountable and influence the direction of the enterprise. In worker co-operatives, this principle acquires particular legal significance because those who perform the productive activity are simultaneously members of the organisation through which that activity is democratically governed. The central challenge is therefore to reconcile protection and self-management without sacrificing either: worker-members must remain fully protected as persons performing work while simultaneously being recognised as members of a democratically governed enterprise with genuine powers of participation and decision-making. It is at the intersection between protection, participation, power and responsibility that the legal distinctiveness of co-operative governance becomes most apparent.

Keywords: co-operative governance; worker co-operatives; democratic member control; occupational safety and health; legal responsibility

Theme(s): Cooperative Law; Worker Cooperatives

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Diffusion Pathways for the Worker Cooperative Business Model in the Food Economy in Germany

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Abstract

Background

Small and medium-sized enterprises (SMEs) play a crucial role in Germany's food economy (Buckwitz et al., 2025; Bundesvereinigung der Deutschen Ernährungsindustrie, 2026). They contribute to the security of food supply (FAO, 2021), regional value creation and employment (Bundesvereinigung der Deutschen Ernährungsindustrie, 2026), as well as food culture and culinary diversity (Buckwitz et al., 2025). Over the past two decades, the food economy has undergone far-reaching structural changes, marked by declining numbers of SMEs and increasing market and power concentration among large (multinational) corporations. This development poses risks for economic resilience as well as social and environmental sustainability, in particular in rural regions. Key challenges for SMEs driving the structural change include unresolved business succession, labor shortages, and price pressure (Buckwitz et al., 2025).

Worker cooperatives, enterprises jointly owned and democratically governed by their employees (Pérotin, 2013), offer a promising response to these challenges. Converting existing firms into worker cooperatives offers a concrete solution to unresolved business succession (Henke, 2025). Research further indicates positive effects on employment stability, working conditions, a more equitable income distribution, organizational resilience, and local embeddedness (Baskaran, 2015; Charmettant, 2025; Pérotin, 2012, 2013; Santos et al., 2025).

However, worker cooperatives remain marginal in Germany to date (Grenzdörffer, 2023). While conditions for their diffusion have been studied in other contexts (Abell, 2014), little is known about them in Germany.

Aims

Following a solutions-oriented approach (Lang & Wiek, 2022; Miller et al., 2014), this doctoral project takes worker cooperatives as a promising solution and investigates how their impact can be amplified in the German food economy. It focuses on support functions as a potential lever (Abell, 2014; Hoover & Abell, 2016). Given the small number of worker cooperatives in the German food economy, this conference contribution focuses on amplifying out (Lam et al., 2020) through the diffusion of worker cooperatives via start-ups and conversions. As a first step, the project develops a current-state analysis of worker cooperatives in Germany. Specifically, it aims to:

- map worker cooperatives in the German food economy;
- map providers of support functions for worker cooperatives in Germany;
- identify barriers to diffusion along both pathways; and
- assess how support functions relate to identified barriers

Methods

The overall project follows a transdisciplinary research design (Lang et al., 2012) moving from a current state analysis to the development and piloting of transformation strategies (Forrest & Wiek, 2014). The current-state analysis combines literature and desk research with formative empirical research on worker-cooperative start-up and conversion processes.

- A list of possible worker cooperatives in the German food economy is compiled based on known cases, desk research, and lists of network organizations. For each case, general information and in-depth

information are recorded, for example on the pathway of emergence (start-up or conversion) and governance characteristics.

- Providers of support functions in Germany are identified through desk research and literature. The providers are recorded in an analysis matrix covering organizational characteristics, sector-specific information, and the offered support functions categorized based on the typology of Forrest et al. (2023).
- Barriers to diffusion are identified based on four expert interviews, practitioner workshops, field and conversation notes, a formative case study of an ongoing conversion, and a literature review. The material is analyzed using qualitative content analysis (Kuckartz, 2012).
- Barriers are matched against the support functions identified in the second step to assess their addressability through existing support structures. Unmatched barriers are classified as requiring policy change or reflecting broader structural constraints.

Results and Discussion

As the project is in an early phase, data collection and analysis are still in progress. The conference contribution presents and discusses conceptual and preliminary analytical results rather than final empirical findings.

Contributions and Implications

The contribution provides an initial picture of worker cooperatives in the German food economy and of providers of support functions for worker cooperatives in Germany. By matching identified barriers with support functions, the analysis distinguishes barriers that support services can potentially address from those reflecting broader structural constraints. It thereby generates practice-oriented knowledge on where existing support functions can be leveraged, where they need to be strengthened, and where additional forms of intervention are required.

The results provide the empirical and analytical basis for the next step of the doctoral project, the development and piloting of a support measure addressing identified leverage points.

Keywords: worker cooperatives; diffusion; sustainability transformation; food economy; SMEs

Theme(s): Worker Cooperatives

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Single-Stakeholder Cooperatives and the Pursuit of the Community Good: Insights from Consumer Cooperative Movements in the Far East

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Abstract

Aims

This paper examines the achievements and limitations of single-stakeholder cooperatives in pursuing the community good, drawing on the experiences of Japanese and South Korean consumer cooperative movements. It seeks to demonstrate both the potential of single-stakeholder cooperatives to contribute to sustainable community development and the institutional challenges they face in extending such contributions. Through a comparison of Japanese and South Korean experiences, the paper explores the need for a new cooperative framework that enables broader stakeholder participation.

Background

Japan's postwar cooperative legislation established a system in which different types of cooperatives are governed by separate laws and administrative authorities according to their membership constituencies. Consumer cooperatives, agricultural cooperatives, and credit cooperatives have consequently developed largely within their respective institutional frameworks, with limited interaction across sectors.

Under the Consumer Cooperative Act, consumer cooperatives are established primarily to promote the interests of their consumer members. Although the legislation does not necessarily prohibit activities that benefit the wider community, its restrictive interpretation and administrative application have historically discouraged cooperatives from pursuing objectives extending beyond the immediate interests of their members.

Nevertheless, Japanese consumer cooperatives have developed various initiatives addressing broader social and community concerns. Sugimoto and Shimokado (2025) examined how Japanese consumer cooperatives contribute to the public good through voluntary member activities beyond their core business operations. However, a more fundamental question remains: can single-stakeholder cooperatives pursue the community good through their business operations themselves, rather than through activities supplementary to their businesses?

South Korea inherited a similarly fragmented cooperative legal framework, influenced in part by Japanese legislation. However, the enactment of the Framework Act on Cooperatives in 2012 opened new opportunities for the establishment of cooperatives involving diverse stakeholders and pursuing broader social objectives. This institutional development offers an important comparative perspective for reconsidering the limitations of Japan's cooperative system.

Methods

This paper adopts a comparative institutional and case-study approach.

First, it examines the legal frameworks governing Japanese and South Korean cooperatives, focusing on how membership structures and regulatory arrangements influence their capacity to pursue community-oriented objectives.

Second, it investigates the Anshim Cooperative in South Korea, established under the Framework Act on Cooperatives. Drawing on field research and semi-structured interviews, the study examines its community-oriented business activities and the possibilities offered by the newer institutional framework, particularly in a region characterised by strong conservative political influences.

Third, it examines the historical development and contemporary challenges of TEIKEI initiatives undertaken by Japanese consumer cooperatives, focusing particularly on the Three Principles of Direct Farm-to-Co-op adopted by the Kyoto Consumer Cooperative. Through literature review and field research, the study considers how these initiatives have contributed to sustainable community development and identifies the limitations they face under the existing cooperative framework.

Results

The Japanese TEIKEI movement demonstrates that single-stakeholder consumer cooperatives can pursue the community good through their business operations by establishing long-term partnerships between consumers and agricultural producers.

However, these achievements also raise a fundamental question concerning the distribution of decision-making power. Although producers are indispensable partners in these initiatives, they do not possess the same formal governance rights as consumer members. This paper examines how this institutional asymmetry affects producers' participation in price formation and the reconciliation of consumer interests with the economic sustainability of agricultural production.

The South Korean experience offers a contrasting institutional framework in which cooperatives can incorporate multiple stakeholders into their membership and governance structures. The comparison provides a basis for considering how Japanese cooperative legislation might be reformed to facilitate more equitable participation in community-oriented enterprises.

Contributions & Discussions

The Japanese TEIKEI movement represents an important contribution to the international cooperative movement. Rather than simply pursuing the commercial competitiveness of retail businesses, Japanese consumer cooperatives have experimented with alternative relationships between consumers and producers, demonstrating the potential of cooperative enterprises to contribute to sustainable communities.

However, the historical achievements of TEIKEI should not obscure the institutional limitations of the single-stakeholder model. As community-oriented business activities become increasingly dependent on collaboration among consumers, producers, workers, and other local stakeholders, organisational structures based exclusively on consumer membership may constrain their further development.

The South Korean experience suggests that a more flexible legal framework, allowing the establishment of cooperatives involving multiple stakeholders, can provide additional institutional opportunities for community-oriented cooperative enterprises.

This paper therefore argues that Japan needs to reconsider its fragmented cooperative legislation and develop a legal and institutional framework that enables the emergence of multi-stakeholder cooperatives while encouraging collaboration among existing single-stakeholder cooperatives.

Such reform would not represent a rejection of the achievements of Japanese consumer cooperatives. Rather, it would provide an opportunity to build upon their historical contributions and extend the cooperative movement's capacity to pursue the sustainable development of communities.

Keywords: Consumers cooperatives, Sustainable community, TEIKEI, Single-stakeholder cooperatives, Multi-stakeholder cooperatives

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How Co-creative Facilitation Supports Business Succession to Worker Cooperatives: A Living Lab Approach

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Abstract

Background

Germany faces a succession bottleneck. The IfM Bonn expects about 186,000 enterprises to be transferred between 2026 and 2030 (Rieger-Fels et al., 2025), while a growing share of owners plan closure: one in four mid-sized firms considers closing once the senior generation withdraws (Schwartz, 2026). In rural areas, successors are increasingly hard to find, and the loss of such firms endangers places of entrepreneurial responsibility and social cohesion (DIHK, 2025). Transfer to the workforce as a worker cooperative can preserve enterprises and jobs and receives political support (Blome-Drees & Rang, 2014; BWGV, 2024), yet it is far more common in Spain, France and Italy than in Germany (Welland et al., 2026). Process models for facilitating succession exist for family-internal transfers (Zehrer & Leiß, 2018), whereas obstacles specific to employee succession, such as acceptance and strategic reorientation, have not explicitly been studied (Schlömer-Laufen & Kay, 2019). Most studies on cooperative conversions focus on legal and financial frameworks (CECOP, 2013) and organisational features (Henke, 2025). Two questions are therefore open. First, how can co-creative facilitation formats help employees practise cooperative behaviours, which we regard as a precondition for internalising cooperative values rather than merely adopting them formally? Second, how do the facilitator's posture and practice, including building relationships, designing decision-making processes and surfacing hindering organisational dynamics, act as an enabling condition for democratic organisational learning?

Aims

In the study we pursue three aims: to show that a transdisciplinary living lab can generate rigorous and practically relevant insight into succession towards worker cooperatives; to examine whether and how co-creative facilitation lets employees practise democratic behaviours, a necessary but insufficient step towards value internalisation that, we argue, depends on leadership openness to self-reflection; and to theorise the facilitator's embodied posture (psychological safety, eye-level relationships, relinquishing a personal agenda) as an underexamined enabling variable.

Methods

The study was part of a three-year transdisciplinary living lab project in rural Brandenburg, Germany. Two craft enterprises were each accompanied for two years at different points of their succession journeys. The design enabled iterative experimentation in authentic settings, with systematic documentation and impact analysis from the outset. The two cases are treated as complementary rather than comparative: they illuminate different phases of the same process. They were selected as viable and structurally relevant craft enterprises, following the logic of analytical generalisation rather than statistical representation. In the first enterprise, about 30 interactions with the project team, including workshops, involved incumbent owners, prospective worker-owners and external advisors in a conversion towards a worker cooperative. Facilitation was co-creative, grounded in design thinking principles, and drew on Liberating Structures (Lipmanowicz & McCandless, 2013), Playmobil Pro and Training from the Back of the Room. In the second enterprise, management deliberately began without employee involvement and was accompanied through eleven workshops on company values, personal and business goals, communication, scenario development

with an external collaboration consultant, and a milestone plan; no decision for a cooperative had been taken. Facilitation practice was itself documented as a research variable. Facilitators engaged in continuous peer reflection (intervision) and personal development, consistent with collegial validation in systemic succession coaching (Zehrer & Leiß, 2018), and drew on reflexivity as a quality criterion in interpretive research (Finlay, 2002) and on action research methodology (Reason & Bradbury, 2008).

Results

Three outcomes emerged in the first enterprise. First, communication among employees changed observably over the project period. Structured co-creative formats produced more deliberate, fact-based peer dialogue, with active listening, engagement with differing perspectives and emerging collective accountability. This was observable in facilitated settings and independently confirmed by incumbent leadership, who reported improved operational coordination and more substantive employee contributions to everyday problem-solving. Second, employees developed nascent self-management capabilities: they organised their own coordination structures, assigned roles autonomously and prepared formal proposals for leadership with only limited facilitator direction. Third, a structural tension emerged. Democratic practices cultivated within peer groups did not transfer automatically into vertical leadership relationships. Where leadership postures remained anchored in hierarchical authority, employee engagement tended to revert towards compliance rather than shared ownership. Facilitator intervision was essential for processing this limitation without compromising ongoing working relationships. In the second enterprise, the leadership-first process led management to a clear two-sentence description of what its succession solution must deliver, before any decision on the legal form. One employee was involved after management had reflected on possible scenarios, and the resulting strategy was then communicated to the managers. The process continues beyond the project period.

Discussion

The first case shows that co-creative facilitation supports succession towards cooperatives in two ways. It creates conditions in which employees practise democratic behaviour, a precondition for value internalisation, and it surfaces the organisational dynamics that hinder conversion. Its impact is amplified where incumbent leadership is open to self-reflection; where hierarchical identity remains unexamined, facilitation reaches its limits. Owners tend to experience possession their firm as part of their extended self (Belk, 1988) – that can include their firm as well. Cooperative conversion therefore requires attention not only to employee development but equally to the identity transition of the incumbent owner, which facilitation can make visible but cannot resolve alone. The second case is consistent with this reading without confirming it: leadership-directed facilitation preceded and shaped employee involvement, and the succession solution was defined before the legal form was chosen. Whether such sequencing eases the vertical transfer problem observed in the first case is an open question that the present material cannot answer. The living lab design was essential for surfacing these dynamics. Only sustained, iterative engagement made the deeper cultural and relational patterns visible and workable, and single-intervention approaches are unlikely to reach comparable depth. This is consistent with Finlay's (2002) view of reflexivity, and suggests extending it from research to facilitation practice. As two cases from one region, the findings support analytical rather than statistical generalisation.

Contributions and Implications

Theoretically, this study advances understanding of co-creative facilitation as a multi-layered practice in which process design, instruments, collaborative culture and the facilitator's posture each play a distinct role in creating preconditions for value internalisation and surfacing hindering dynamics, particularly at leadership level. Methodologically, it shows that a multi-year living lab combines rigour with contextual insight that is difficult to obtain in controlled settings. Practically, the project has produced workshop documentation, case narratives and a practitioner toolbox that compiles the facilitation tools with the most useful outcomes in the two cases, helping owners and their advisers get started through small steps, trusting relationships and inner clarity about the framework conditions of succession. It is offered as a

transferable resource for European multipliers such as cooperative associations, chambers of crafts and regional development agencies. The findings also identify a research priority: the identity transition of incumbent owners, and the sequencing of leadership and employee involvement, as critical and largely unaddressed factors in cooperative conversion.

Keywords: business succession; worker cooperatives; co-creative facilitation; living lab; leadership reflexivity

Theme(s): Education and Training about / for Cooperatives; Worker Cooperatives

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