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Editorial: Cooperatives at the Frontline of Societal Transformation

ABSTRACT

In our current era, we face widespread expulsion from multiple systems due to complex, multi-causal problems. Many of these challenges are rooted in economic dynamics that have severely impacted the environment and heightened societal insecurity. In response, hybrid organizations—particularly cooperatives—have been recognized for their potential to bridge the divide between environmental concerns and socio-economic development. This JEOD special issue entitled *Cooperatives at the Frontline of Societal Transformation* highlights the crucial role cooperatives play in addressing today's societal challenges and “wicked problems”, with a focus on their contributions to democratization, decommodification, and decarbonization. In this editorial, we introduce the idea that these processes occur across micro, meso, and macro levels and that cooperatives can achieve sustainable outcomes due to their embeddedness within regions and local communities. The articles included in this issue explore one or more of these levels, providing insights and stimulating future discussions on the role of cooperatives in economy and society. This collection also seeks to promote epistemic justice for cooperatives, particularly as we approach the International Year of Cooperatives in 2025.

KEY-WORDS

COOPERATIVES, SOCIETAL CHALLENGES, SOCIAL IMPACT, EMBEDDEDNESS, PROXIMITY

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1. Multi-system expulsions: environmental, economic, and social challenges

We currently live in an era of expulsion from diverse systems—economic, social, and biospheric (Sassen, 2014). While in some cases, expulsion may occur within a single system, it is more common to experience multi-level expulsion due to the interconnectedness of systems. The problems arising from this have been characterized as “wicked”, defined by complexity, i.e., circular causality, persistence, the absence of clearly defined boundaries solutions, difficulty in implementing trial-and-error learning approaches, contradictory certainties among stakeholders, and entrenched interests (Rayner, 2006). Critical scholarship suggests that the current environmental stress originates from economic activity, particularly the heavy reliance on fossil fuel energy and the excessive use of water. Consequently, the deterioration of the biosphere has led to species loss and the disruption of the biochemical cycles of phosphorus and nitrogen (Scott Cato, 2020). To capture these various areas of environmental impact, Rockström et al. (2009) introduced the concept of “planetary boundaries”, defining a safe operating space for humanity across nine processes that regulate the stability and resilience of the Earth system, noting that some boundaries have already been breached.

In addition to the environmental degradation, the structure of economic activity is also driving societal insecurity across multiple dimensions. Following the 2008 financial crisis, many countries witnessed a significant resurgence of protectionism, with national stimulus packages addressing the crisis. However, concerns were raised about the underestimation of the crisis’s consequences, particularly in terms of job destruction and its impact on economic stability (Stiglitz, 2009). Job security has become increasingly rare in society, with insecure forms of employment proliferating in recent years. The “gig economy” exemplifies this trend, mimicking the artistic industry, where each gig or concert is a one-off task with no further commitments from either party. Platforms operating in the gig economy have emerged as solutions for the economy, connecting consumers needing tasks completed with entrepreneurs seeking their next “gig”, thus creating an economy where humans are treated as a service (Prassl, 2018) and a social class named “precariat” given its living and working conditions. This process has highlighted the externalization of responsibility and control over economic transactions into the hands of a few (Vallas and Schor, 2020), illustrating the concentration of economic power within a plutocracy. However, the characteristics of the precariat extend beyond unstable labor conditions: they lack secure occupational identities and must engage in significant unpaid labor-related activities, such as applying for jobs or delivering presentations. They also often rely solely on monetary wages without associated benefits like paid holidays or medical coverage (Standing, 2015). The negative impacts of these economic transformations have not only deeply affected individuals’ lives, but have also reshaped politics and eroded democracy, largely due to increasing inequalities, uncertainty, and instability. Corporations have played a significant role in amplifying and accelerating these processes (Griffin, 2017; Amis, Mair and Munir, 2020; Ferreras, Battilana and Méda, 2022). This cyclical dynamic has coincided with the rise of far-right political forces, some of which have recently gained power, alongside the denial of the environmental crisis (Schaller and Carius, 2019).

As these challenges evolve and, in some cases, intensify, they have recently begun to receive significant attention. Elevated levels of economic activity and production, narrowly focused on profitability and anchored to neo-liberal models of development, have been identified as major contributors to both socio-economic and environmental deterioration (Klein, 2014; Tomaskovic-Devey and Avent-Holt, 2019). Moreover, hybrid organizations have been identified as better equipped to address the “triple bottom line”, pursuing social, environmental, and financial objectives simultaneously (Battilana, Besharov and Mitzinneck, 2017), although attention to organizations that do not follow the investor-owned model are more rare in mainstream research (Atzeni, 2012; Parker et al., 2014). To reconcile the prevailing divide between environmental concerns and socio-economic development, the United Nations (UN) formulated the sustainable development goals (SDGs). These aim to provide an integrated and inclusive framework for structuring solutions (Caballero, 2019). While the SDGs aim to offer a framework to reduce the multi-level expulsion systems experienced by societies, private organizations continue to play a significant role in creating and perpetuating inequalities (Tomaskovic-Devey and Avent-Holt, 2019).

2. Cooperatives and sustainable development: embeddedness, proximity, and social impact

Although not all companies adopt the same approaches, cooperatives have been recognized by the UN as vital partners in achieving these goals. There are a variety of forms of cooperatives, such as consumer, producer, community-owned, housing, and worker-owned as the most common types. Moreover, they operate in multiple economic sectors, like agriculture, professional services, manufacturing and construction (Dow, 2003). Despite the variety and differences, cooperatives are an organizational form that represents a different ownership category, organizational form, and management approach. Cooperatives promote democracy, increase incomes, foster social inclusion, and prioritize environmental sustainability, and have embraced environmental commitment (Azkarraga and Cheney, 2019). Supporting this, recent research has shown that aligning with the SDGs has enhanced the performance of cooperatives in various regions (Díaz de León et al., 2021; Mozas-Moral et al., 2021). However, power imbalances, which distort our understanding of these issues, often remain unacknowledged, leaving certain valuable experiences and contributions to minimizing these challenges yet to be uncovered.

This special issue aims to tribute epistemic justice in this way (Ferrerias, Battilana and Méda, 2022) by highlighting the role of cooperatives in addressing current societal challenges and wicked problems. As previous studies have shown, cooperatives democratize work, treating workers not as mere human resources but as enablers of business development through collective action, autonomy, and democratic practice (Daskalaki and Kokkinidis, 2017). Furthermore, they govern organizations in a way that recognizes work not as a commodity but as a fundamental human right (Peredo and McLean, 2020). In many cases, democratization and decommodification are also accompanied by decarbonization. These three transformations are essential for reconstructing our economic system

to prioritize people and the planet over profitability (Battilana et al., 2022). In this regard, rather than framing responses to grand challenges as overly grandiose or theoretical, we contribute to the study and visibilization of humble solutions against grand challenges, arguing that cooperatives are uniquely positioned to address both the socio-economic and environmental challenges facing our society. By taking collective responsibility, cooperatives provide actionable solutions across multiple societal levels.

At the micro level, cooperatives are organizations deeply rooted in values such as self-help, self- and social responsibility, democracy, equality, equity, and solidarity towards others (ICA, 1995). These values align with the principles developed by the Rochdale Pioneers in the 19th century. *Autogestión* has also been highlighted as a pivotal value in cooperatives, referring to the control over and provision for one's reality through collective collaboration with others—a concept that the English term “self-management” fails to fully encapsulate (Vieta, 2016). While these values are fundamental to the organization, the individuals involved also embody and propagate them beyond the cooperative, thereby transforming their broader social context (Borzaga and Tortia, 2009; Giagnocavo, Gerez and Sforzi, 2012; Ribas et al., 2022; Lomuscio, 2024). However, maintaining a commitment to these values presents a significant challenge for cooperatives, particularly when they operate within market dynamics (Cheney et al., 2014; see also degeneration theory). Recent research suggests that solidarity actively transforms social relations, enabling cooperatives to resist capitalist appropriation and realize their transformative potential. This is achieved by enhancing their social role, embedding cooperatives within trans-local resistance structures, and fostering participation in activist political alliances.

Moreover, cooperatives provide societal benefits at the meso-level, employing 10% of the world's active population (EURICSE and ICA, 2023). While this is a significant figure, the more critical point is that cooperatives offer quality employment, markedly distinct from the gig economy (Pérotin, 2013). For instance, unlike the substantial wage disparities often found in investor-owned companies, cooperatives typically implement a wage-differential cap of 1:9 between entry-level workers and top-level managers (Altuna, 2008; Irizar and MacLeod, 2010). This is feasible because many worker cooperatives uphold democratic values in areas such as capital provision, surplus redistribution, and organizational management. In a similar vein, worker cooperatives have demonstrated a greater capacity to preserve employment during periods of economic turbulence compared to conventional firms (Birchall and Ketilson, 2009; Borzaga, Carini and Tortia, 2022). As members of cooperatives share equity and decision-making authority, they can prioritize individuals over profit when making decisions. For this reason, Peredo and McLean (2020) argue that worker cooperatives effectively decommodify labor by minimizing the impact of market forces in determining wages as well as their decisions.

Finally, at the macro level, cooperatives make a significant contribution to the global economy. While they are often perceived as a marginal phenomenon, there are over 3 million cooperatives worldwide, with 12% of the global population involved in them. In 2023, the largest cooperatives reported an annual turnover of 2.5 billion USD (EURICSE and ICA, 2023). Although the

overall economic impact of private companies is undeniably larger, cooperatives stand out for their commitment to self-help values, which enable them to engage meaningfully with the wider world. In this context, cooperatives reinvest their earnings into their communities, demonstrating a heightened concern for the people and environment around them (Pérotin, 2013). As a result, cooperatives emerge as organizations with a long-term vision for sustainability. They balance economic success—essential for their survival—with the wellbeing well-being of their members and a strong sense of environmental responsibility.

In recognition of their impact, the UN declared 2012 as the International Year of Cooperatives to highlight their role in the economy and their contribution to social and economic development through employment generation, poverty reduction, and social integration. As we approach 2030—the target year for achieving a fairer future—and given the limited progress made by private firms and national governments, the UN has now declared 2025 as the International Year of Cooperatives. This declaration emphasizes “the lasting global impact of cooperatives and the cooperative model as a crucial solution for addressing various global challenges, underscoring the significant role cooperatives play in advancing the implementation of the Sustainable Development Goals (SDGs) by 2030” (UN, 2024). This announcement coincides with the writing of these lines. Following Stiglitz (2009), it is our hope that this new International Year of Cooperatives can serve as a platform to transform traditional notions of production and measures of GDP, incorporating wellbeing, community connections, and environmental stewardship. It aims to make visible the significant contributions cooperatives can offer in addressing the complex challenges our societies face. Although cooperatives operate within certain limitations and face challenges, we believe that the articles in this special issue contribute to the ongoing debate and help to highlight how cooperatives are already building a more sustainable and equitable future.

Cooperatives foster sustainable development and react to societal challenges because they are socially and economically embedded (Polanyi, 1957; Granovetter, 1985), in an interconnected way (Nowak and Raffaelli, 2022). Embeddedness refers to how economic activities are integrated into social relations and institutional frameworks. Such a concept is pivotal to understanding cooperatives’ unique roles in fostering sustainable development and inclusivity (Levi, 2001; De Bernardi et al., 2024). Cooperatives, as entities driven by democratic values and mutual benefit, are anchored to local communities and networks (Vieta and Lionais, 2015). This embeddedness is particularly significant in cooperatives’ dual role as economic enterprises and social organizations.

Cooperatives’ territorial embeddedness connects them to the local communities they serve. As Bijman and Wijers (2019) highlight, cooperatives are essential for rural development and agricultural sustainability, provided that cooperatives maintain their mutualistic scopes and that institutional support is assured. Cooperatives that shift from community-centered models to market-driven strategies often face challenges in maintaining plain inclusivity and democracy, especially among marginalized members and beneficiaries. This dual orientation of cooperatives reflects a broader tension between pursuing economic efficiency and fulfilling social goals. Relational embeddedness, as discussed by Su, Zhang and Guo (2020), further illustrates the importance of trust, shared

values, and participatory governance in cooperatives' internal operations. The equitable treatment of members within cooperatives fosters cohesion, enhances democratic governance, and ultimately ensures sustainability.

The embeddedness of cooperatives is shaped by various forms of proximity, as outlined by Boschma (2005): cognitive, organizational, social, institutional, and geographical. Cognitive proximity influences embeddedness when cooperatives use local knowledge to deliver goods and services that are otherwise unmet by the state or the market. Organizational proximity plays a role as cooperatives frequently collaborate, building on the principle "cooperation among cooperatives". Social proximity, in a Polanyian sense, is evident as cooperatives address grassroots societal needs that remain unmet. Therefore, cooperatives stick to their social networks to achieve the social goals identified by members, beneficiaries and users. Finally, institutional and geographical proximity enhances embeddedness by enabling nearby cooperatives to interact, exchange knowledge, and cultivate a local cooperative ethos, thereby driving regional agglomerations.

At the same time, cooperatives are embedded because they act locally. The connection between cooperatives, as social enterprises, and proximity has been recently underscored by the choice of the European Union to include the Proximity and Social Economy within the 14 recognized EU industrial ecosystems (European Commission - Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, 2022; EISMEA, 2024a; 2024b; 2024c). Such a choice genuinely creates a connection, both theoretical and empirical, between the social and solidarity economy, and proximity economies. This political operation emphasizes the local roots of social ties of cooperatives, among other social economy organizations. As mentioned by the European Commission and the European Innovation Council and SMEs Executive Agency (EISMEA, 2024a: 9):

"The proximity economy shares some characteristics with the social economy, notably both refer to largely locally rooted, short value chains for mainly local production and consumption. Hence, the intersection of the proximity and social economy has at its core the development and the needs of the local community. An interesting intersection between the two ecosystems in terms of social and relational perspective is cooperatives, community-based organisations and partnerships in the entrepreneurial field which are characterised by local re-investment, organised collective action, common interests, and solidarity principles."

Cooperatives' ability to align local—global (Levi, 2001) and social—market dynamics (Bijman and Wijers, 2019) through embeddedness allows them to integrate sustainability practices effectively, setting them apart from conventional businesses. Ultimately, such sustainable practices make cooperatives compelling in addressing societal challenges due to the local social ties they create and ground in. Cooperatives can act as catalysts for local development, fostering economic empowerment while addressing societal challenges such as inequality and climate change. For example, the findings of De Bernardi et al. (2024) show how embeddedness enables cooperatives to implement systemic circular economy practices, underscoring their potential as leaders in sustainability transitions.

3. Contributions in the special issue

The present special issue features four research articles and a book review.

In their contribution, *Worker Cooperatives and Development: A Business Cycle Analysis*, Marina Albanese and Gianluigi Cisco study how firms change their attitude towards environmental issues during phases of economic development and look at differences in governance behavior across firms. The authors employ a general equilibrium model to analyze the role of cooperative firms in achieving sustainable development goals, a topic relatively unexplored in the macroeconomic literature. The analysis of the impact of cooperatives in achieving the SDGs at different stages of the business cycle offers a novel perspective by comparing cooperative and capitalist firms and examining their role in promoting sustainable development within the business cycle.

The authors' analysis shows the pro-environmental behaviors of firms in response to macroeconomic shocks that influence overall economic activity. Positive fluctuations in the business cycle are represented by productivity shocks mirroring a phase of economic expansion. The role of governance models in driving pro-environmental behaviors following a positive productivity shock is analyzed and simulated. The authors' results show that cooperative firms prioritize immediate consumption and environmental goals, demonstrating a greater initial increase in both consumption and abatement efforts. In contrast, capitalist firms focus on increasing work hours and investment, resulting in a more significant immediate increase in output. The authors' findings highlight the crucial role of governance structures in shaping corporate behavior towards sustainable development. The propensity of cooperative enterprises to engage in voluntary environmental efforts during economic growth phases highlights their potential to promote sustainable practices, which has important policy implications.

The article *Collective Impacts through Job Crafting in a Unionized Worker Cooperative* by Seon Mi Kim and James M. Mandiberg examines the role of unionized worker cooperatives in facilitating job crafting among precarious workers, and focuses on Cooperative Home Care Associates (CHCA) in New York. CHCA, a hybrid organization combining worker cooperative principles and union representation, was analyzed through interviews, observations, and document reviews. The study explores how CHCA's structure and strategies enable workers to reshape their roles and tasks, enhancing their agency and working conditions—namely job crafting.

Using a qualitative case study approach, the research involved in-depth interviews with 18 CHCA workers and three organizational leaders, in addition to field observations and document analysis. The study identified three types of job crafting at CHCA—task, relational, and cognitive—and introduced the notion of “organizational job crafting”, defined as “workers' combined activities to collectively modify their job tasks, relations, and cognitive aspects, thereby shaping their organizational work environment”. Evidence shows that workers at CHCA engaged in collective activities that expanded their roles and influenced organizational policies, supported by CHCA's participatory governance and union resources. CHCA's hybrid model also fostered strong collective

identity and provided non-trivial pathways for personal and professional growth. The analysis performed on CHCA demonstrates how hybrid organizational structures can empower precarious workers, highlighting the potential of union cooperatives to foster social change. The findings underline the importance of structural and social supports for enabling job crafting, suggesting broader applicability for addressing challenges in alternative organizational models.

Jerome Warren's article *A Path-Dependence Analysis of Italian Social and Community Cooperatives* blends microeconomic theory (agency) and organizational theory (stakeholder and entrepreneurial groups) with evolutionary theory to study a path-dependence process of the emergence of multi-stakeholder and community cooperatives in Italy. It contributes to an evolutionary theory of the emergence and increasing complexity of the cooperative form in Italy at the intersection of microeconomic, organizational and entrepreneurial theory.

The emergence of multi-stakeholder cooperatives disseminates lessons on the changing nature of cooperatives and enterprises in general. Cooperatives are interpreted as generative tools for problem solving through self-organization beyond markets, the state and classical business hierarchies. According to an evolutionary perspective, they take on new functions and improve their problem-solving capacity in response to underlying changes in the social and economic environment. To study complexity and resilience within economics and organization science, the article recognizes cooperative ecosystems as complex adaptive systems.

Since cooperatives have historically emerged and evolved to solve specific social problems (e.g., job preservation or social inclusion and poverty reduction), theories of agency and stakeholder management serve as conceptual tools for analyzing path dependency, complexity, discontinuous change, self-organization, and resilience, as opposed to concepts such as efficiency and optimization. Within this broad domain, the concept of the quintuple helix is employed, which adds environmental stakeholders from civil society to government, industry and academia (Etzkowitz and Leydesdorff, 1995). Microeconomic and organizational theories are extended to interpret the evolution of cooperative relations and contracts as institutional tools for the evolving agency of stakeholders in organizations. It goes beyond overly simplistic applications of path dependency approaches to extend reflective processes of dialogue between civil society, economic actors and government to organizational theory and innovation studies on social and community cooperatives.

The article *Integral Cooperatives as Prefigurative Organizations: Towards a Commons-Based Development Model* by Catarina Lopes Mateus and L. Filipe Olival examines the rise and impact of integral cooperatives in Portugal as alternatives to the neo-liberal development model. It situates these cooperatives within a “commons-based development” framework, emphasizing economic democracy and environmental sustainability. Drawing on extensive fieldwork with two case studies, Minga and Rizoma cooperatives, and the broader Portuguese Network of Integral Cooperatives, the study explores how these organizations embody prefigurative politics by practicing the socio-economic changes they advocate. Integral cooperatives demonstrate scalable models for transitioning from market-state dependencies to community-driven development. Their practices inspire policy reforms emphasizing social equality and ecological responsibility, showcasing a vision for post-capitalist futures. Evidence

reveals that alternative organizational, social, and political models play a vital role in addressing societal challenges that stem directly from the implementation of neo-liberal policies

The research aims to evaluate how these cooperatives counter neo-liberal development, embody democratic principles, and foster local autonomy. It employs long-term ethnographic methods, including participant observation, interviews, archival analysis, and surveys within the cooperatives and the network. The study identifies four key strategies for transitioning from a neo-liberal development model to a commons-based development model that prioritizes democratic governance, social equality, and ecological sustainability. These strategies are: (i) establishing an alternative shared value system grounded in solidarity, democracy, and environmental care; (ii) generating communitarian means of production and distribution through collective ownership and cooperative governance; (iii) deploying democratic management of common resources to ensure accountability and equitable decision-making; and (iv) creating local and inter-cooperative support networks to strengthen autonomy and resilience, while countering external pressures from the market and state systems.

Lastly, Andrea Cori concludes the special issue with the review of the book *Innovations for Circularity and Knowledge Creation: Participation and Cooperative Approaches for Sustainability*, co-edited by Andrea Bernardi, Massimiliano Mazzanti and Salvatore Monni (Palgrave Macmillan, Cham, Switzerland, 2024, 234 pp.). The volume seeks to understand cooperatives' role in sustainable development, by presenting the cooperative model as particularly effective in advancing circular economy practices. Spanning 12 chapters, the book addresses practical case studies, highlighting the potential of cooperatives to harmonize economic, social, and environmental goals, and tackle emerging societal challenges. Balancing theory and application, this book offers valuable insights for academics, policymakers, and practitioners, while inviting further research into cooperatives' transformative potential in sustainability, innovation and circular economy.

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