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## The International Year of Cooperatives and the 2020 Vision

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# International Year of Cooperatives and the 2020 Vision

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## Abstract

The cooperative movement underwent in 2012 a renewed impulse with the declaration of the “International Year of Cooperatives”. In this paper we present the results of the interviews conducted with international experts of the sector, who belong to national organizations following the Delphi methodology. The questionnaire gathered qualitative information from experts about the balance of this celebratory year. Moreover, it was used as a discussion tool to evaluate obstacles and the potential for accomplishment of the objectives outlined in the project “2020 Vision”. This project identifies the challenges faced by the cooperative movement as it strives to keep encouraging, strengthening, and giving visibility to cooperatives worldwide.

## Keywords

Cooperatives, Delphi, International Year of Cooperatives, 2020 Vision

## JEL codes

P13, P17, J54, Q01

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## 1. Introduction

### *1.1 The dimension of and obstacles to the international cooperative movement*

The General Assembly of the United Nations (UN), by Resolution 64/136 of 18 December 2009, urged governments and institutions to help in achieving the objectives set by the proclamation of the Declaration of 2012 as the "International Year of Cooperatives". It underlined the contribution of this business model to economic and social development in many regions and countries, and to poverty alleviation. Under the slogan "cooperative enterprises help to build a better world", the UN<sup>1</sup> posed for that year three main objectives: i) to increase awareness amongst the general public on the contribution of cooperatives to the economic and social development in many countries; ii) to promote the creation of new cooperatives and the growth of existing ones, with the participation of all the public and private players involved; and iii) to encourage governments and regulators to implement policies and regulations aimed at fostering the development of this business model. The World Co-operative Monitor<sup>2</sup> (Euricse & ICA, 2012), indicated the turnover of the 300 largest cooperatives—located in 24 different countries—in 2010 to be 1,975.6 billion USD. These were primarily insurance cooperatives and mutuals (977.2 billion USD) and cooperatives of banking and financial services (158.7 billion USD). The available database of this report provides information on 2,192 cooperatives and mutuals in 61 countries and quantifies the turnover of non-banking cooperatives and non-insurance services institutions as 1,155.1 billion USD, and that of banking and insurance institutions, respectively, as 180.6 and 1,106.3 billion USD.

The importance of the global cooperative model was analyzed in a study recently published in the UK (Mayo, 2012), which compared the number of cooperative business members worldwide (1,000 million) with the 328 million people who are direct shareholders of conventional capitalist companies in the world, and the approximately 565 million indirect shareholders, who make capital contributions to companies through an issuer, investment funds, etc.

The UN itself, in its communication "Draft guidelines aimed at creating a supportive environment for the development of cooperatives" stated that "it would be appropriate to review the policy of most Member States of the United Nations in this area, and in some cases significantly revise it" (UN, 2001: 15). Recognizing the positive impact of cooperatives on the social and economic development of the countries in which they operate, on job creation and poverty eradication among other aspects, the report points out some critical issues that should be reviewed nationally, with the participation of the states and the representative organizations of the cooperative movement itself.

Based on the legislative framework, Chaves and Monzón (2008: 26) point out that "even advanced countries like Spain, Italy and France suffer from inflation of the legislation in this field, with different laws depending on the type of cooperative and government levels (national and regional)". Then, the legislation should be adequate, updated, and adapted to the needs and

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<sup>1</sup> For further information on the International Year Statement (2012), see the official website: <http://www.un.org/es/events/coopsyear>

<sup>2</sup> The world Co-operative Monitor is a project run by ICA and Euricse aimed at reporting the socio-economic value and impact of cooperatives, both within a global scenario and in their regional and national contexts. See: [www.monitor.coop](http://www.monitor.coop)

peculiarities of the sector. The legal norms in their various forms (cooperative laws, regulations, etc.) as well as legal, administrative, or judicial practices ought to be guaranteeing, instead of limiting, the operation and development of the sector, in recognition of its special character with respect to its values and principles as well as the profits generated for the entire society, by means of special and separate treatment in regard to its policies and practices. As pointed out by the International Labour Organization (ILO, 2012) and other authors such as Mayo (2012), policies and legislation in many countries currently limit the creation and growth of cooperatives.

The deficiencies and constraints embedded in the regulatory framework of cooperatives in some countries—compared to other models of companies or nonprofit organizations—weaken and limit the scope and form of their business operations. This can diminish the visibility of the cooperative model and prevent potential interaction, integration, and internationalization, and in some cases encourages the transformation of mutual and cooperative enterprises into nonprofit companies in the pursuit of special tax treatments or less stringent regulatory frameworks (Borzaga and Galera, 2012). The latter has been the case for credit unions in various parts of the world (Birchall and Hammond-Ketilson, 2009) following the establishment of certain requirements and international accounting and financial standards, such as the Basel International Regulatory, which imposes requirements on management and capitalization similar to those of conventional private banking and unwittingly make cooperatives unviable or prevent their further development (Grillo, 2013; Ferri, 2012). Policy development should, considering the special nature of cooperatives, not over-regulate and hinder their development.

States, besides having a legal framework that recognizes cooperatives and their organizations, should establish an effective state-cooperative partnership on equal terms with other associations and organizations, able to maintain a suitable environment for the development of cooperatives. Also, it would be desirable to have unique acts of bonding, communication, and coordination, as well as homogeneous norms and procedures and the presence of unions and federations of cooperatives and other representative organizations of the sector, recognized as social interlocutors and positive elements for the greater presence and political power of the sector.

In turn, dissemination of information to the public on the special contribution of the movement to national economies and societies is desirable. This highlights the need to improve the availability of statistics for and about cooperatives, and integrating them into national statistical services.

In other policy areas, there is a need for inclusion of the cooperative example and its values as well as dissemination tools for this information. Of particular interest is the implementation, at all levels of the educational system, of the study of the principles and history of the cooperative movement and its actual or potential contribution to the social and economic development of nations, through promotion of the values of democracy, participation, and solidarity which fully describe this business model (Hernandez, 2006; Gherardi and Masiero, 1990). Educational policies, together with an improved outreach effort and information on the importance and values of the cooperative movement, could eventually contribute to greater social recognition of this form of enterprise and its benefits, enhancing and highlighting its own identity and helping to overcome some common misconceptions and prejudices.

A critical aspect in the development of cooperatives is the need to improve the level of competitiveness of the sector in the market. To achieve this, programs and support services should be defined, aimed at strengthening management, organization, finance, marketing, and innovation in the cooperative enterprises, and their overall competitive capabilities, as well as their access to services and funding in conditions similar to those of conventional businesses. The proposed public support should ensure, without generating clientelism or interventionism in the sector, the independence and sustainability of projects and cooperative enterprises, since it is necessary that these reach a sufficient level of efficacy. The recognition of its special character, and therefore the need for a specific treatment, often does not prevent the level of support of the sector from being weak, often similar to other entrepreneurial initiatives, and generally contradictory and without interest (Borzaga and Galera, 2012). Thus, in some cases there is discrimination between cooperatives and non-profit organizations, the latter having greater access to tax benefits or support despite the fact that both have the same social goals and are of general interest.

Training and cooperative education are essential tools for ensuring good governance of cooperative organizations. In addition to the management difficulties that such organizations face, because of their ownership structure and decision-making processes, they sometimes fail to comply with certain principles (democracy, independence, etc.) and some of the values of the cooperative model. Tracking models and management practices of capitalist enterprises, occasionally contrary to and inconsistent with the cooperative form of ownership are often identified as the reason for failure and as an obstacle to further development of the movement (Zamagni, 2012). This stems from not knowing how to take advantage of the model in terms of direct and active participation of the members or not knowing how to adapt and introduce innovative forms of governance in the organization, typically when it becomes bigger and there is greater heterogeneity of interests amongst its members (Jones and Kalmi, 2012).

The current economic crisis is provoking, in different areas and aspects, deep reflections on the economic system and the need to search for a type of model distinct from that of the dominant companies in the current market economy. Although the values and benefits in terms of sustainability of cooperatives enterprises are commonly recognized, these remain the great unknown form of existing company models. Thus, the lack of knowledge and understanding of the cooperative business model prevents it from being the first choice of an entrepreneur at the time of starting a new business. Despite the current conditions of economic crisis and job destruction, entrepreneurship strategies generally “neglect the cooperative option” (ILO, 2012).

Internationally, the study of the resilience of financial cooperatives to the crisis conducted by Birchall and Hammond-Ketilson (2009) can be highlighted. This emphasizes the financial inclusion of the poor sector of the population, the creation of quality employment in cooperatives, and the safeguarding of local economies as the performance criteria, not profit maximization as in the case of conventional companies, as well as the provision of services to the community and, especially, attendance to the needs of its members.

## *1.2 The International Year of Cooperatives 2012 and the 2020 Vision*

The UN declared 2012 as the International Year of Cooperatives (IYC-2012) worldwide, and its main objective was to raise public awareness of the importance of the cooperative model in economic and social development and its contribution to achieving the Millennium Development Goals. The representative collective enterprise model, more sustainable and responsible, is based on values and principles that enable a more democratic management of projects, joint decision making, and a greater internal commitment to the development of territories. The presence of the model in every country in the world, including leading companies in specific sectors and countries, demonstrates its competitiveness and its importance in terms of job creation, poverty reduction, and economic development. It is also a benchmark for greater equity and resistance in the current economic crisis in many countries. Therefore, the UN recognized the need to dedicate one year to highlighting the importance of developing, supporting, and publicizing further the benefits of this model of collective enterprise, with three objectives in its Declaration of the IYC-2012 (UN, 2010)<sup>3</sup>:

- 1<sup>st</sup>. To raise public awareness of its socio-economic benefits
- 2<sup>nd</sup>. To promote new cooperatives and develop existing ones
- 3<sup>rd</sup>. To encourage governments to establish policies and laws aimed at the development and stability of cooperatives

Towards the end of 2012, the International Cooperative Alliance (ICA), integrating 270 cooperative representative of organizations of various sectors (agriculture, credit, savings, insurance, manufacturing, healthcare, service, and consumption) from 94 countries, presented an action plan which aimed to continue the approach initiated by the UN with IYC-2012. So, in January 2013 the General Assembly of the ICA approved—in its meeting in Manchester—the future strategies, called the “2020 Vision”. Consolidating and reconciling the statements made in the proclamation of IYC-2012, they proposed “raising the cooperative business model to a new level” (ICA, 2013: 5), with the goal of ensuring that during this decade cooperatives become:

- 1<sup>st</sup>. The business model most preferred by people
- 2<sup>nd</sup>. The acknowledged leader of economic, social, and environmental sustainability
- 3<sup>rd</sup>. The fastest growing type of business organization

The purpose of this project is to guide the future of the sector and achieve the proposed objectives by implementing various strategies and actions in five related areas for further development of the sector: (i) to increase member involvement and cooperatives governance; (ii) to position the cooperatives as creators of economic, social, and environmental sustainability; (iii) to build and strengthen the cooperative message and define the identity of cooperatives; (iv) to ensure legal frameworks supporting cooperative growth; and (v) to obtain reliable capital that is socially constructive, stable, and controlled and directed by the members to meet the development needs of people.

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<sup>3</sup> See also the UN website of the IYC-2012: <http://www.un.org/en/events/coopsyear/>

The aim of this work is to obtain the evaluation of experts from the international sector regarding the impulse—in terms of promoting, strengthening, and increasing the visibility of its benefits—that the cooperative movement has received from the recent celebration of the IYC-2012 in their respective countries. They have reflected on the difficulties, development needs, and challenges facing the cooperative movement in the fulfillment of the strategic challenges also highlighted in the recent “2020 Vision” project.

## **2. Methodology**

### *2.1 Source of information*

The information offered here comes from semi-structured interviews conducted between November 2012 and February 2013 with experts of the cooperative sector of various nationalities, following the Delphi methodology. According to Linstone and Turrof (2002), the Delphi technique is a method of “structuring a process of group communication that is effective in allowing a group of individuals, as a whole, to treat a complex problem”. This qualitative analytical methodology was used for the first time in the early 1950s for military purposes in the United States—which was not made known until a decade later by Dalkey and Helmer (1963)—and seeks to obtain the opinion of a group of persons or a panel of experts linked to a specific problem, without requiring contact between the consulted experts. To this end, a questionnaire is sent to selected experts in successive rounds, and they are informed of the results of the previous round. Through this systematic and iterative method, feedback is obtained on the responses of the interviewees, who can change their previous answers to seek greater convergence or divergence in their opinions, as well as the inclusion of new contributions and comments or suggesting new aspects to be considered (Landeta, 2002).

In the cooperative field, a number of studies have implemented the Delphi technique. For example, Gallego and Julia (2003) performed an analysis of the Spanish law of cooperatives based on the opinions of the experts, Seguí-Mas and Server-Izquierdo (2010) identified singularities in the capital of the credit union entities in Spain, and Seguí et al. (2011) analyzed the applicability to cooperative societies of prediction models of business failure, while Campos and Chaves (2012) used this technique to identify the determinants of the crisis in Mediterranean agriculture. At the international level, the United Nations recently implemented this methodology as part of its project “Millennium Project-Nodes” (UN, 2012), which includes an international panel of experts to explore the global challenges of the cooperative movement.

### *2.2 Description of the methodology used*

To achieve the proposed objective of analyzing the current situation of the international cooperative movement, of explaining the effect of the celebration of the IYC-2012, as well as of evaluating the future challenges marked by the project “2020 Vision”, a questionnaire was designed under the supervision of two experts. For this, we used some of the questions and answers used by the UN for the preparatory work and the writing of the Report of the General

Secretary on the desirability and feasibility of an International Year of Cooperatives, when it was a subject of discussion at the 64th session of the General Assembly in 2009 (UN, 2009b). For each question, the respondents were asked to rate their level of agreement with the given responses on a Likert scale of 1 to 5, where 1 is a very low level of accordance with the consideration offered and 5 is a very high level of agreement. The first questionnaire was sent by e-mail to more than 290 organizations from various sectors affiliated to the ICA, as well as to 15 other experts: some were the heads of a research association (CIRIEC branches in different countries), some worked on specialized journals of the sector in various countries, and some were members of administration bodies dedicated to the support of the sector. After this first dispatch (1st Round) of the questionnaire in three languages (English, French, and Spanish), responses were obtained from 20 experts (Tab. 1). These were from countries in different continents (Europe, North America and Central America, Asia, and Oceania), representatives of national sector associations (federations, confederations, and cooperatives) of the ICA, and researchers with an average experience of 22.5 years in the field and a very high level of knowledge of the national cooperative movement.

**Table 1 – Panel of experts interviewed**

Experts	First Round			Second Round		
	Sent	Received	(%)	Sent	Received	(%)
ICA members*	290	11	55.00	11	7	58.33
Others**	15	9	45.00	9	5	41.67
Total	305	20	100.00	20	12	100.00
<b>(Score, from 1 to 5: from very low to very high)</b>				<b>Median</b>	<b>Mean</b>	<b>Mode</b>
Level of knowledge of national cooperative movement				4.50	4.35	4.00

Source: Own elaboration from Delphi Survey.

\* Confederations, federations, and unions.

\*\* Researchers from universities, research centers, observatories, and administration bodies related to the sector.

The answers of 20 experts in the 1st Round were analyzed and included in a second questionnaire (Round 2). New affirmations declared as important by the experts and statistical analysis (medians and frequencies) of the answers given to all the questions were also included and sent individually to each expert. They were offered the opportunity to change their initial answers; 12 experts responded in both rounds. We confirmed the existence of an adequate level of stability in the responses obtained after analyzing the variation and the Interquartile Range Ratio (IQR) of the distribution of responses and the relative variation of the median between the two rounds. As verified in the following sections, the median was considered as the measure of central tendency of the experts' responses. Moreover, in order to measure the dispersion of the sample, the coefficient of variation of the responses and the value of the IQR (the difference between the upper and lower quartile divided by the median:  $(Q3-Q1)/Q2$ ) were calculated, both being inversely proportional to the degree of group consensus on each question.

The stability of the measurements of the trend centrality and dispersion of responses achieved in the Second Round was determined by the variation of  $IQR^{Rk-Rk-1}$  ( $= IQR_k - IQR_{k-1}$ ) and the variation of  $Me^{Rk-Rk-1}$  ( $= (Me_k - Me_{k-1})/Me_{k-1}$ ), where  $k$  is the number of Rounds (R)—in this work a total of two. Similarly, it was found that a small number of experts in the Second Round had modified their responses, with a high percentage of dropouts, which led to the conclusion that two rounds were



enough and that the final number of responses was valid. As established by Landeta (2002), starting with less than seven experts, the incorporation of one more significantly increases the quality of the estimation group. From this number upwards, the prediction error is reduced exponentially and optimal panels contain seven to 30 experts; this study lay within this interval.

### **3. Results and discussion**

#### *3.1 The cooperative movement*

##### *3.1.1 Contributions to the global cooperative development*

The questionnaire began by asking experts to evaluate different arguments about the numerous benefits that cooperatives have on global socio-economic development, which justify that this business model should be subject to further consideration and support. Table 2 includes the evaluations given by the experts to the first list of contributions of cooperatives to socio-economic development in the 1st Round, as well as the new contributions that they provided for evaluation in the 2nd Round of the questionnaire. The first nine statements included as possible answers to this question in Round 1 were used in the questionnaire implemented by the United Nations in February 2009 for international experts of the sector (UN, 2009a).

Analysing the responses of the 2nd Round, the cooperative movement was considered to provide a “significant” contribution to development (with a median of 4 or 5) for all the reasons outlined except the argument that they contribute to the provision of accessible health services to the population. Of all the arguments, there were five in which the contribution of cooperatives is “very important or positive” in the opinion of the experts (the mode of their responses reached the value of 5). Specifically, and ordered according to their median, the outstanding contributions of the cooperative movement to worldwide socio-economic development are that they contribute to the development of rural areas and constitute a more equitable alternative to the dominant company model, followed by the arguments that they generate more stable employment of better quality, enable the creation of employment for people with disabilities or at risk of exclusion, and help provide affordable financial services to the population. The first two arguments are included in the questionnaire of the 2nd Round and are considered outstanding contributions of cooperatives to global development. Other arguments in favor of the cooperative model, with an assessment of the importance of their contribution to development (median = 4), are a more widespread access of the population to basic goods and services, such as housing or food, allowing poor and excluded people all over the world to obtain a livelihood, promoting local development, a better response to the current economic crisis, and dissemination in society of values such as solidarity and equity. The Interquartile Range (IQR), used to check for a high level of consensus in the responses obtained, had an equally high level of stability for the two rounds completed. Thus, for the statements included in this questionnaire, there was only one in which one of the experts changed their response, without generating any changes in the median or IQR values in the rest of the affirmations—hence confirming the stability achieved with the feedback exercise provided by this Delphi methodology with successive rounds.

**Table 2 - Principal contributions of the cooperatives to national development**

(Score from 1-5, indicating: 1: Strongly Disagree; 2: Disagree; 3: Indifferent; 4: Agree; 5: Strongly Agree).	1 <sup>st</sup> R	2 <sup>nd</sup> Round				
	Md	Median	Me	Mo	IQR	CV
1. Cooperatives help in creating jobs	4.0	4.0	4.3	4.0	0.25	0.15
2. Cooperatives generate more stable and better quality employment	4.5	4.5	4.3	5.0	0.22	0.20
3. Enable the creation of employment for people with disabilities or in risk of exclusion	4.0	4.0	4.2	5.0	0.25	0.22
4. Play an important role in the socio-economic development of your country	4.0	4.0	4.1	4.0	0.06	0.16
5. Improve gender equality	4.0	4.0	4.1	4.0	0.19	0.22
6. Contribute to ensuring food security	4.0	4.0	3.8	4.0	0.13	0.19
7. Provide livelihoods for the poor, contributing to poverty reduction*	4.0	4.0	4.1	4.0	0.06	0.16
8. Provide affordable financial services	4.0	4.0	4.2	5.0	0.50	0.22
9. Provide affordable healthcare	3.0	3.0	3.4	3.0	0.33	0.34
<b>10. Other relevant aspects (2nd Round)</b>		<b>Median</b>	<b>Me</b>	<b>Mo</b>	<b>IQR</b>	<b>CV</b>
10.1. Contribute to the promotion of values in society (solidarity, equity...)		4.00	4.0	4.0	0.25	0.28
10.2. Improve the chances of success of small businesses and/or projects		4.00	4.0	4.0	0.25	0.20
10.3. They reduce the effects of the current economic crisis		4.00	4.2	4.0	0.25	0.30
10.4. Contribute to further local, more sustainable development		4.00	4.4	4.0	0.19	0.21
10.5. Contribute to the development of rural areas		5.00	4.9	5.0	0.15	0.10
10.6. It is a more equitable alternative to the dominant company model		5.00	4.8	5.0	0.22	0.12
10.7. It allows easier and economic access to housing		4.00	4.3	4.0	0.00	0.20

Source: Own elaboration from the Interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds).

Note: Statistical measures of central tendency (Median-Md., Media-Me., & Mode-Mo) and dispersion (Relative interquartile range - IQR and Coefficient of Variation-CV).

\*Variation<sup>R2-R1</sup> IQR/CV=-0.06/-0.02. In the rest of the questions Variation<sup>R2-R1</sup> of IQR/CV= 0.00/0.00

\*\*The median in both rounds coincided; thereby the arithmetic mean of both rounds was used.

### 3.1.2 Social responsibility and cooperative identity

In the opinion of most experts, cooperatives are now a more responsible business model (in economic, social, and environmental terms) with respect to encouraging the participation of workers regarding ownership, decision-making, and benefits—hence promoting social cohesion and a more sustainable local development. In the 2nd Round, nine experts (75 per cent) considered that this affirmation was entirely correct (18 of 20 in the 1st Round). The experts who did not share this affirmation referred to the failure of some cooperatives in their countries to comply with the underlying principles of the model, distancing them from the ideal of the cooperative business model. An example of this view is that of one of the consulted experts from an Asian country, who noted that “only some cooperatives are now a true example of a more responsible business model”.

The Seven Cooperative Principles inspiring the model (open and voluntary membership; democratic control of its members; economic participation of its members; autonomy and independence; education, training and information; cooperation among cooperatives; and commitment to the community) by themselves confer the highest ethics and corporate social responsibility onto cooperatives, which—unlike most capitalist enterprises—do not have profit maximization as their only or main objective. For this reason, the experts were asked to what extent cooperatives in their countries may not be developing or adequately fulfilling any of these seven principles, which guarantee the social benefits of this business model.

As shown in Table 3, 10 of the 12 experts (83 per cent) who provided answers to the two rounds indicated that it is true that cooperatives are not adequately fulfilling at least one of the seven cooperative principles (70 per cent in the first round). According to some experts, cooperatives could—in most cases—seek to fulfill the guiding principles, counting on indispensable tools. The business efficiency required, in the context of an increasingly competitive national sector, often prevents adequate conciliation between economic efficiency and the perfect fulfillment of the essential principles of the model. Next, the experts were asked to indicate the three principles that, in their opinion, are often or more intensely unfulfilled by cooperatives: the fifth (Education, Training, and Information), sixth (Cooperation between cooperatives), and seventh (Commitment to the community) principles were the most frequently cited.

**Table 3 - Evaluation of compliance with the cooperative principles**

<i>AF and RF (%)</i>	<b>1<sup>st</sup> Round (20)</b>			<b>2<sup>nd</sup> Round (12)</b>	
	<b>No</b>	<b>Yes</b>	<b>NI</b>	<b>No</b>	<b>Yes</b>
Fulfilment of the cooperative principles by cooperatives of their country	14 (70.0%)	4 (20.0%)	2 (10.0%)	10 (83.3%)	2 (16.7%)
<i>AF and RF (%)</i>	<b>1<sup>st</sup> Round</b>			<b>2<sup>nd</sup> Round</b>	
5.- Education, training, and information	7 (36.8%)			7 (35.0%)	
6.- Cooperation among cooperatives	5 (26.3%)			6 (30.0%)	
7.- Commitment to the community	4 (21.1%)			3 (15.0%)	
2.- Democratic control of its members	1 (5.3%)			2 (10.0%)	
4.- Autonomy and independence	2 (10.5%)			1 (5.0%)	
3.- Economic participation of its members	0 (0.0%)			1 (5.0%)	
1.- Open and voluntary membership	0 (0.0%)			0 (0.0%)	

Source: Own elaboration from the interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds).

### 3.1.3 Key players in the development and support of the sector

There are many organizations and public or private institutions that, internationally, have an important role in the promotion, regulation, and enhancement of the visibility of the benefits of the international cooperative movement. To discover and evaluate the work done, the experts interviewed were asked to evaluate the importance of different organizations or key players in the promotion and development of the cooperative sector in their country. As shown in Table 4, national federations and confederations were given a higher valuation (median = 4), demonstrating their importance in supporting the development of the sector in each country—as they occupy an “important” role in defending the interests of the sector in dealings with national administrations. The importance given to the central or local government is very low, indicating the minor importance that they have in the promotion and development of the sector, in the opinion of the experts consulted. Slightly higher is the value that they gave to international organizations, such as the ICA, which—although having a median valuation close to neutral (3.5)—obtained a valuation of 4 (mode), the same as for confederations and federations. Other players, such as the ILO, international cooperation agencies, and the media, obtained global assessments of “little” or “very little” importance in relation to the impact of their work in the development of the sector. The respondents underlined the importance of the defense and promotion of the

cooperative movement by national federations and confederations, with a close and strong link to the needs and problems of cooperatives in their respective countries, and the role that both, in addition to the ICA, have in the communication with the national government over their demands for reforms at the legislative, labor, and fiscal levels—to increase the resources devoted to the promotion and encouragement of the sector. Regarding the level of stability of the responses between the two rounds, the changes in the assessment of the role played by the above-mentioned organizations were minimal, with a very high level of consensus for the importance of national administrations, international organizations, and the media—which, in general, were more valued among experts from developed countries.

**Table 4 - Importance of key players and agencies in the development of the movement**

(Score from 1 to 5, with 1 very little importance and 5 very important)	1 <sup>st</sup> R	2 <sup>nd</sup> Round				
	Md	Median	Me	Mo	IQR	CV
National Administration <sup>1</sup>	2.5	2.0	2.42	1.00	1.50	0.62
Local Government <sup>2</sup>	2.0	2.0	2.45	2.00	0.50	0.49
Cooperative Federations <sup>3</sup>	4.0	4.0	3.73	4.00	0.25	0.34
ICA-Intern.Coop. Alliance <sup>4</sup>	3.0	3.5	3.17	4.00	0.36	0.40
Universities and research centers <sup>5</sup>	3.0	2.5	2.67	2.00	0.50	0.46
International Organizations (ILO, ...) <sup>6</sup>	3.0	3.0	2.50	1.00	1.00	0.55
Foreign Cooperation Agencies <sup>7</sup>	2.0	2.0	2.18	1.00	1.00	0.57
<b>Other organizations (2<sup>nd</sup> Round)</b>		<b>Median</b>	<b>Me</b>	<b>Mo</b>	<b>IQR</b>	<b>CV</b>
NGO		2.0	2.50	2.00	0.63	0.43
Mass media		1.0	1.67	1.00	1.25	0.53

Source: Own elaboration from the Interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds).

Variation<sup>R1-R2</sup> of IQR: <sup>1</sup>0.00; <sup>2</sup>0.00; <sup>3</sup>0.00; <sup>4</sup>-0.06; <sup>5</sup>-0.25; <sup>6</sup>0.17; <sup>7</sup>-0.33

Variation<sup>R2-R1</sup> of CV: <sup>1</sup>0.00; <sup>2</sup>-0.16; <sup>3</sup>0.10; <sup>4</sup>0.00; <sup>5</sup>-0.03; <sup>6</sup>-0.02; <sup>7</sup>-0.04

\*The median in both rounds coincided; thereby we used the arithmetic mean of both rounds.

In order to know more about the confederations and federations present in the country of origin of each consulted expert, they were asked to indicate the names of the major organizations representing the cooperative sector in their country. The information offered on their respective websites provided additional data on some of these major organizations, mentioned by the experts, in the 1st and/or 2nd Round. However in general, only in the most advanced countries these organizations do offer much information on their web sites, providing details of their size, partners, and activities. Below are some of the examples described by the experts, on organizations which are diverse in their activities and dimension:

- A) The Confederación Empresarial Española de Economía Social (CEPES) is the largest umbrella institution of the social economy in Spain, representing cooperatives, worker-owned companies, mutual insurance companies, etc. It performs as an official spokesman for all of them, being composed of 30 confederate sector representative organizations which defend, promote, and encourage the social enterprise model in general and cooperatives in particular. In terms of its economic magnitude, the companies it represents account for 7.5 per cent of the gross domestic product (GDP) of the country, with a turnover of 145,290 million EUR, while it combines more than 42,680 companies, more than 15 million associated persons, and 2.6 million jobs.

- B) The Confederación de Cooperativas de Ahorro y Préstamo de México (CONCAMEX) is a third degree cooperative organization, of public interest, with a legal personality and its own assets. In 2010, it was composed of 20 federations, 237 cooperatives, and a set of 4.6 million members and had assets of 59 million Mexican pesos. Note that in Mexico there are multitudes of confederations and federations representing the cooperative sector.

The level of integration of the cooperative movement in the national representative confederations varies widely among countries. One interesting example is found in countries like Spain, where a single body brings together other sectorial associations in order to represent them in communications with the government. In this regard, the experts were asked to what extent they considered that the presence of a single confederation representing the national cooperative sector would be positive and adequate for its defense—with one voice putting more pressure on the government for the application of legislative changes, support, etc. Eighty percent of the respondents in the 2nd round (only 60 per cent in the 1st) thought the existence of a single entity in their country representing the whole sector as desirable. As for the reasons in favor of having a single representative confederation, two experts justified their point of view by stating “the regulatory criteria and efforts to strengthen the cooperative sector will be unified” and “the sector would have a unique voice, coherent and consistent with the public administration and therefore would achieve uniformity of action”. The experts who were against a single representative confederation identity justified their opinion thus: “the cooperative movement still has not developed enough to get this condition” and “each cooperative sector has its own needs”.

### *3.2 The International Year of Cooperatives*

#### *3.2.1 The balance of the UN Declaration*

With the aim of assessing the declaration of the IYC-2012 and its impact on the cooperative sector, the experts were asked to provide an overall evaluation of the effect of this celebration on the cooperative movement in their country. Of the experts who responded to the questionnaire in both its rounds (12 of 20), two-thirds had a positive evaluation of the Declaration IYC-2012 (Tab. 5), to which must be added the opinion of an expert—belonging to an organization located in India—who valued very positively this UN initiative in terms of “increasing social awareness through various programs organized during 2012”. There were no negative evaluations.

The four experts consulted who said that IYC-2012 had had little impact on the cooperative sector in their country were professional organizations located in the Philippines, Poland, Czech Republic, and Romania. They understood that, beyond the contribution of this declaration to increasing public awareness of the importance of cooperatives in their respective countries and the benefits of this type of business, it had not caused a significant increase in the number of cooperatives created or in the development of the existing ones and had not provided a significant stimulus to governments to establish policies or laws aimed at the further development of the sector. As recalled by the ICA in its report of January 2013 (ICA, 2013) entitled “Blueprint for a Co-operative Decade”, the 2012 declaration should be seen as a starting point for the period 2011-2020 and the

public-private efforts and strategies initiated worldwide will have to redoubled in this decade; if not, this opportunity could be wasted.

**Table 5 - Evaluation of the IYC-2012**

<b>AF and RF (%)</b>	<b><i>Slightly positive</i></b>	<b><i>Positive</i></b>	<b><i>Very positive</i></b>	<b><i>Total</i></b>
<b>2<sup>nd</sup> Round (12)</b>	4 (33.3%)	7 (58.3%)	1 (8.3%)	12 (100.0%)
<b><i>Promemoria</i></b>				
	<b><i>Slightly positive</i></b>	<b><i>Positive</i></b>	<b><i>Very positive</i></b>	<b><i>Total</i></b>
<b>1<sup>st</sup> Round (20)</b>	5 (25.0%)	12 (60.0%)	3 (15.0%)	20 (100.0%)

Source: Own elaboration from the Interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds). Absolute Frequency (AF) and Relative Frequency (RF).

The positive consideration of the effects of the IYC-2012 on the sector was expanded with another question posed to experts about the three objectives of the Declaration described by the UN in its presentation. As seen in Table 6, one positive effect on the sector seems to have been achieved: namely, increasing “awareness of the benefits of the cooperative model”. In contrast, the IYC-2012 was not valued positively—no impact on the sector—in regard to the promotion of new cooperatives and the strengthening of existing ones, or the encouragement and incentives given to their governments to promote legislative or regulatory frameworks more favorable to the sector.

**Table 6 - Main effects of the celebration of the IYC-2012 in their country**

<b>(Score from 1 to 5, with 1 very little importance and 5 very important)</b>	<b>1<sup>st</sup> R</b>	<b>2<sup>nd</sup> Round*</b>				
	<b><i>Md</i></b>	<b><i>Median</i></b>	<b><i>Me</i></b>	<b><i>Mo</i></b>	<b><i>IQR</i></b>	<b><i>CV</i></b>
Raise public awareness of the socio-economic benefits of cooperatives*.	4.0	4.0	3.6	4.0	0.38	0.37
Promote the formation of new cooperatives and the development of existing ones*.	3.0	3.0	3.0	4.0	0.42	0.38
Encourage governments to establish policies and laws aimed at the development and stability of cooperatives*.	3.0	3.0	2.8	4.0	0.75	0.44
<b><i>Other achievements (2<sup>nd</sup> Round)</i></b>		<b><i>Median</i></b>	<b><i>Me</i></b>	<b><i>Mo</i></b>	<b><i>IQR</i></b>	<b><i>CV</i></b>
Increase awareness of governments and their civil servants toward cooperatives.		3.0	3.33	4.00	0.50	0.27
Increase public resources devoted to supporting the cooperative sector.		2.0	2.83	3.00	0.88	0.47
Increase the integration and coordination of the cooperative sector itself.		4.0	3.50	4.00	0.38	0.34

Source: Own elaboration from the Interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds).

\*Variation<sup>R1-R2</sup> of IQR and of CV in the 3 affirmation was: 0.000

As shown in the last rows of the table, some experts of the sector proposed the addition to the questionnaire of other achievements derived from the IYC-2012. The experts in the second round considered as important (median = 4) the impulse that the IYC-2012 gave to increasing the coordination and cooperation among sector entities in each country. Also, they valued as important the increased awareness of governments and their civil servants toward cooperatives (mode= 4), although there is consensus that this had a negligible effect (median= 2) in the allocation of public resources to support the sector.



### 3.2.2 Future challenges of the cooperative sector

Then, the experts were asked to assess the importance, in the coming years, of the devotion of more efforts, resources, and public support to improve aspects that are currently hindering the development of cooperatives in their respective countries. As shown in Table 7, the different areas of action mentioned were highly valued by the experts, in all cases being considered of high-priority or important (median and mode = 5) - which highlights the deficiencies that still exist today therein. As the experts understood, beyond increasing public resources aimed at promoting the sector, it is essential to introduce reforms in national legislative frameworks conducive to the development of the cooperative movement, adapting to its needs and peculiarities. As well as the importance of having a general framework for the development of the movement, it is important to strengthen the competitive capacity and their access to financial resources. It is also necessary to strengthen the organizations through improvements in their internal operations. In other areas, the experts underlined the importance of continuing to devote resources to increasing the awareness and visibility of the benefits of the cooperative business model for citizens, as well as continuing to promote collective entrepreneurship as an alternative to fulfill their needs; for example, by including in the educational systems teaching modules dedicated to the dissemination of cooperative values. The level of consensus and stability in all the responses was very high in all the affirmations considered in this question. From them were derived some ideas about the areas in which national policies and strategies should continue to promote and strengthen the sector in the coming years, continuing the line already marked internationally by the International Year of Cooperatives.

**Table 7 - Policies and strategies to strengthen in the coming years**

(Score from 1 to 5, with 1 very little importance and 5 very important)	1 <sup>st</sup> R	2 <sup>nd</sup> Round*				
	Md	Median	Me	Mo	IQR	CV
To increase awareness of citizens about the benefits of cooperatives and their contribution to the socio-economic development of their countries.	5.0	5.00	4.58	5.00	0.20	0.11
Encourage people to organize themselves into cooperatives and self-help measures aimed at addressing their needs, increasing their desire to create.	5.0	4.50	4.33	5.00	0.22	0.20
Reform laws (commercial, fiscal, etc.) that favor cooperatives.	5.0	5.00	4.58	5.00	0.05	0.17
Increase public resources for the promotion of cooperatives.	4.0	4.50	4.33	5.00	0.22	0.18
Enhance competitiveness, technical, and cooperative training.	5.0	5.00	4.67	5.00	0.05	0.14
Facilitate access to financial resources for the capitalization of cooperatives.	5.0	5.00	4.50	5.00	0.20	0.15
Strengthen and improve the internal functioning of cooperatives.	5.0	5.00	4.67	5.00	0.20	0.11
Include cooperative values in education and training.	5.0	5.00	5.00	5.00	0.00	0.00

Source: Own elaboration from the Interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds).

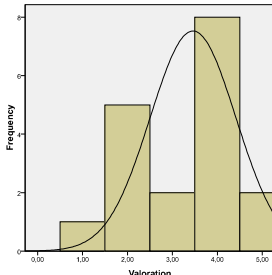
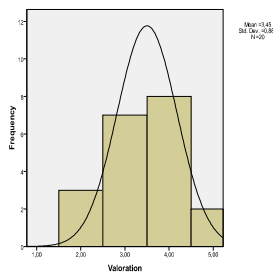
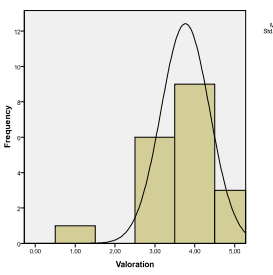
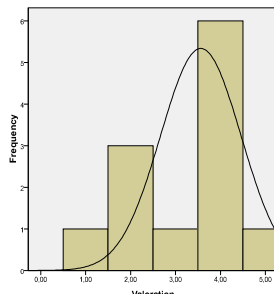
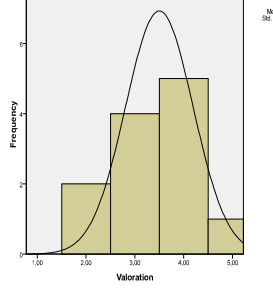
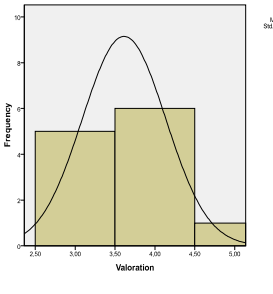
\*In all affirmations we obtained a variation between <sup>R1-R2</sup> IQR/CV: 0.00/0.00.

### 3.3 International strategy for sector development in the next decade

As already noted in previous sections, the General Assembly of the ICA held in November 2012 presented a plan called "2020 Vision", which raised three great challenges to meet in the next decade, to promote the international cooperative movement. The experts were asked to indicate

to what extent they considered it likely (with 1 very unlikely and 5 very likely) that the three major goals set for 2020 will be achieved. As shown in Table 8, with respect to the first objective, the histogram of the dispersion of responses shows no consensus (IQR > 0.5) over whether the cooperative model will be the model preferred by people. While the median response indicates a probability between 50 and 75 per cent that this will occur, another group of experts believed it unlikely (25-50 per cent probability) that this goal will be reached. For the next two goals, the level of consensus was higher (IQR < 0.3), meaning that most of the experts (mode = 4 and median = 4) think it likely (50-75 per cent) that cooperatives in 2020 will be recognized as the leading model of economic, social, and environmental sustainability. A slightly higher probability was assigned to the third objective, that these will be the fastest growing business model in this decade.

**Table 8 - Possibilities of achieving the objectives of the “2020 Vision”**

Score from 1 to 5: 1 very unlikely (0-25%), 2 unlikely (25-50%), 3 may or may not occur (50%), 4 probable (50-75%), and 5 highly probable (75-100%)		1 <sup>st</sup> R	2 <sup>nd</sup> Round				
		Md	Median	Me	Mo	IQR	CV
1 <sup>st</sup> objective: A business model preferred by people*.		4.00	4.00	3.25	4.00	0.50	0.37
2 <sup>nd</sup> objective: The acknowledged leader of economic, social, and environmental sustainability**.		3.50	3.50	3.42	4.00	0.29	0.26
3 <sup>rd</sup> objective: The fastest growing business by type of organization***.		4.00	4.00	3.67	4.00	0.25	0.18
	Objective 1	Objective 2		Objective 3			
1 <sup>st</sup> Round							
2 <sup>nd</sup> Round							

Source: Own elaboration from the Interviews (1<sup>st</sup> & 2<sup>nd</sup> Rounds).

\*Variation<sup>R1-R2</sup> IQR/CV: 0.00/0.00; \*\*Variation<sup>R1-R2</sup> IQR/CV: 0.00/-0.02; \*\*\*Variation<sup>R1-R2</sup> IQR/CV: 0.00/0.00

Some of the experts pointed out that their responses were related to how these objectives could be achieved mainly in certain activities in their own country, since they are already a reality in some productive sectors or regions of their countries. It is notable that the cooperative model was already leading in the agribusiness sector, in recognition of its sustainable activities in certain



countries and territories, together with other examples described: unions, housing, and worker cooperatives. Also, in some regions like Québec (Canada), cooperatives were a model that largely met many of the goals set by the project "2020 Vision", with a significant recognition by society. As an example, below are set out some of the arguments that the experts presented from three countries, indicating to what extent today the cooperative sector occupies a prominent position in certain productive activities and territories of their countries. In Spain, an expert noted, "the agricultural cooperatives account for 100 per cent of tobacco production, 80 per cent of the grape must supply, 70 per cent of the production of wine and olive oil, 45 per cent of the production of citrus, cow's milk, sheep's milk, and nuts, and 35 per cent of olives, fruit, sheep and goat meat, cereals, oilseeds, and cotton". In Ireland, another expert noted, "agricultural cooperatives represent 65 per cent of all cooperatives, and in 2005 the agricultural cooperatives accounted for 98 per cent of the total agricultural sector". Also, a Polish expert considered "dairy cooperatives the most preferred business model for milk producers and represent 70 per cent of the total market share; in addition the credit cooperative is the most preferred banking model for low-income people and the sector has 2 million members". To conclude this section, the respondents were asked to indicate actions that could contribute (if not to achieving the goals set in the project "2020 Vision" then at least to moving forward in their attainment) to the achievement of the targets set for the year 2020. The responses were varied and were directed to three main fields, described below according to their importance:

**a) Strategies for increasing social awareness:** Eleven of the respondents indicated in the first round that is necessary to intensify efforts aimed at increasing the citizen's awareness about the benefits of the cooperative model, suggesting among other ideas "education programs for cooperatives" or "public awareness programs on the cooperative model with supporting promotional activities".

**b) Increased involvement of administrations:** Ten of the experts stressed the need to increase public resources for the training and promotion of cooperatives, one of them saying it was necessary to "get the attention and increase the interest of governments on the virtues of the social economy and cooperatives in order to support and promote them", while seeking:

**c) Further reforms in the normative regulatory framework of the sector:** Eight of those who believed it was necessary to undertake further legal reform to promote the creation and strengthening of cooperatives, used expressions like: "creating a stable legislative framework conducive to the development and support of cooperatives" and "for the entry of young people into the sector". They also mentioned: the sector's easier access to "financial resources", reforms that promote greater unity of effort within the sector, "consolidating the model by increasing the level of cooperation among cooperatives at all levels", "achieving a greater universities-cooperative movement link", or "the creation of a single representative body of the cooperative movement at the national level".

#### 4. Conclusion

Undoubtedly, the IYC-2012 has been successful in promoting, strengthening, and increasing the visibility of the benefits of cooperatives as well as underlining the importance of the cooperative movement on the economy at national level, as an alternative model to the traditional capitalist enterprises. However, the cooperative movement is facing several obstacles and challenges, as mentioned in the project "2020 Vision" promoted by the ICA. The analysis of the qualitative information provided by the experts interviewed, described in this paper, revealed the important contribution that the cooperative model makes to the socio-economic development of the country, especially in rural areas, generating more stable and quality employment while representing an alternative to the dominant business model. In addition, the experts indicated a very positive aspect of cooperative enterprises—namely that they are a more responsible business model in economic, social, and environmental areas. As for the negative aspects facing cooperatives, the experts noted the lack of fulfillment of some cooperative principles, especially in the education and cooperation fields. The study also reveals the lack of importance that local and national governments give to the cooperative sector in terms of supporting and encouraging its development, unlike other, highly valued institutions such as the ICA and cooperative federations and confederations. This paper presented statistical data on the involvement of the latter, in relation to their mission to support, represent, and defend cooperatives. The study also identified policies and strategies that would help support the cooperative sector. Actions such as the strengthening of competitiveness, training, or technical capacity on the one hand and—on the other hand—improvement of the internal functioning of cooperatives along with the efforts of governments in the fiscal and commercial areas, would be important for the sector. Looking to the future of the cooperative movement, the experts considered the challenges proposed by the ICA to be achievable, especially as they considered that cooperatives are the type of company that will grow fastest. However, the involvement, support, and shared effort—starting with citizens, through cooperatives and their members, and ending with the involvement of national governments and international organizations—will be key factors in meeting these challenges.

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