

Design and Progress Report: Pilot Study in Poland¹ **Examining Social, Economic and Community Benefits of Cooperatives**

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Abstract

This paper describes the first phase of a multi-country, multi-year study, which is being undertaken by the OCDC Research Group to ascertain the effects that primary cooperatives have on the economic and social well-being of their members as well as broader community effects that the cooperative itself has. The study, which is in its preliminary pilot phase in Poland, aims to gain deeper insight into the generalizable, differentiated value across sectors and countries that cooperatives may provide as a consequence of their shared characteristics and principles. The underlying intent of the study is to inform design and implementation of cooperative development initiatives at both the practice and policy levels, particularly in the developing world, in order to improve performance and beneficial economic and social impact at the grassroots.

At the direction of its Board, the OCDC Research Group has initiated a multi-country, cross-sector research study with the aim of gaining a more systematic understanding of the social and economic effects that cooperatives have on the lives of primary society members as well as the social and economic effects that cooperatives within a community have on that community. This paper reports on progress to date in designing the study, situates the study within the context of cooperatives in Poland today, and describes the conceptual and methodological approach that is being taken based on the hypothesis that cooperative development, when adapted to local contexts while observing universal cooperative principles, has a huge potential to “level the playing field” by increasing incomes, enhancing inclusiveness and developing social capital.

The mixed methods to be employed in the study include survey research of a representative sample of primary society respondents, focus groups, and one-on-one interviews with both key and representative

¹ The US Overseas Cooperative Development Council (OCDC) is a membership association of US cooperative development organizations (CDOs) working in developing countries to help bring about greater equity through cooperatives. The OCDC Research Group supports these programs through knowledge creation and evidence that bridge theory and practice. This study has been commissioned by OCDC’s Board of Directors and is being partially funded by the U.S. Agency for International Development (USAID).

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interlocutors. Comparable data using the same methods and instruments will be gathered across all countries. This study will draw on both quantitative and qualitative analysis, using the same mixed method methodology as that used in the pilot study in Poland. The multi-country study is the centerpiece of OCDC's research agenda and is anticipated to take place over the next three years.

This paper reports on the current status, focusing on the development of the Poland pilot project, including methodological and implementation challenges, and comments on the process involved, including the challenges of gathering comparable data across sectors and complexities within the cooperative sector which are evidenced in Poland and are expected to occur, with presumably different permutations, in the other countries to be studied³. It also presents the Poland Context analysis, paying special attention to changes that have occurred since Poland's transition to a market economy and membership in the European Union and their bearing on the cooperative sector.

Introduction – Key Conceptual Challenges

This study is called “What Difference Do Cooperatives Make?” thus intending to get the core of the value that cooperative development brings to its members and the societies in which they live. Poland was selected by OCDC as the location for the pilot study as many members of OCDC engaged in cooperative development in Poland during the 1990s and early 2000's, at the moment when Poland was transitioning to a market economy. In this regard, OCDC members have an interest *inter alia* in looking at any “legacy” effects that might be present as well as in understanding the evolution of cooperatives in Poland. This aspect of the study will supplement the findings from the primary research to be carried out, helping to illuminate and deepen insight into the role of cooperative development in Poland today.

While the general line of inquiry looking at the benefits of cooperatives to members and their communities would seem to be fairly straightforward, there are numerous challenges that have had to be addressed in the initial design phase.

- Differences in cooperative structure and concerns exist across sectors. These differences are observable and to be expected. All too often, however, both research and operational focus has tended to be placed on such differences rather than upon the commonalities that run through cooperative development, no matter the sector. While credit unions and electric cooperatives will use different financial ratios to ascertain effectiveness, just as health cooperatives and agricultural producer cooperatives will approach their membership and marketing with different intentions, there are core underlying principles that unite their effort. Paradoxically, more rigorous research attention has been paid to differentiating elements particular to various sectors than has been paid to the concepts that unite them. Notable exceptions exist, such as an excellent though small study on social enterprises (including cooperatives) in Poland which looks at “... autonomous legal entities, providing goods or services with an explicit aim to benefit the community, owned or managed by groups of citizens and in which the material interest of investors is subject to limits.” (Giza-Poleszczuk & Hausner, 2008)
- In designing this pilot study and developing its supporting instruments, this dichotomy between cooperatives as a *modus operandi* and the specific sectors in which they are created has

³ The countries to be studied following the pilot study in Poland will be selected by OCDC in late 2017. We expect to select for geographic diversity as well as maturity of the cooperative movement.

presented a greater conceptual challenge than originally anticipated. As we have engaged with various stakeholders among our membership and within Poland, it seems at times that it is easier for many to focus on specific indicators rather than on the “right” level of abstraction that will enable cross sectoral comparison. The pilot phase is intended to help us to understand how best to “get at” these measurements as well as to draw some generalizable conclusions about the situation in Poland.

- An important principle in this pilot study, as well as in the larger study which the Poland pilot will inform, is to look at three dimensions of effectiveness – social, economic and community – which together, in OCDC’s hypothesis, define the “cooperative difference.” However, in Poland (and often in other places as well), “definitions” and “nomenclature” can be impediments to clarified understanding of which organizations are to be studied, so it is important that in selecting the sample and conducting the study that the organizations selected possess common defining characteristics that reflect these three dimensions.
- That “cooperative” means many different things to different people only adds to the complexity. The term “cooperative” tends to be laden with either positive or negative attributes – cooperatives are sometimes perceived negatively as a legacy of the past as has been identified in the case of Poland (Czachorska-Jones, 2017; Giza-Poleszczuk & Hausner, 2008) or cooperatives may be perceived as a part of the “third sector” or social economy and so positively as an instrument of inclusion of the most marginalized (Giza-Poleszczuk & Hausner, 2008), or equally for different reasons viewed positively as an economic engine, a manifestation of private sector entrepreneurialism as tends to be the case in the US more than in Europe, or in negative contrast as a vehicle that is focusing on economic more than social concerns and so seen negatively as is also the case in some places in Poland (Czachorska-Jones, 2017). “Unpacking” that term and designing instruments that get to the essence of the issues have been challenging undertakings.

Overview of Pilot Study in Poland

Due to the complexities inherent in this ambitious research project, piloting the study before undertaking a multi-country effort will enable the researchers to develop a nuanced set of instruments and to modify the approach as seems necessary. In this section, we provide the broad lines of the study design.

- **Hypothesis:** OCDC hypothesizes that cooperative membership has a measurable beneficial impact on the well-being of members and on the quality of life in the communities they serve. OCDC further hypothesizes that the principles that inform cooperative development are key determinants of beneficial impact and that they may be successfully applied across sectors and countries. It is something of a “truism” that the “cooperative” way – the combining of these three aspects – is what makes the difference. However, some research findings point to a different sort of conclusion as the evidence with respect to the social impact is weaker than that for the economic benefits. While cooperatives may have a significant direct impact on the lives of members and indeed transform communities through the services they deliver (e.g. credit, agricultural inputs, access to markets, housing, and the like), there is a gap in evidence concerning their significance in other social and societal domains. (Pollett, 2009)

- **Approach:** The research study will take place over several years (anticipated 2017-2020) in 4-5 geographically diverse countries with reasonably mature cooperative movements. The study will address the same questions in all countries and use the same methodology. Recognizing that there are significant contextual differences that may influence outcomes and that may need to be accounted for in data interpretation, each country study will be preceded by a Country Context analysis that provides an overview of the cooperative movement in that country following the 2017 piloting of the study in Poland.

Analysis of results will provide findings for Poland and indicative findings for the study itself, enabling adjustment of methods for future country studies as appropriate. The instruments validated in Poland will be tested for reliability in each of the subsequent countries studied. OCDC intends to engage local institutions for sampling, data collection and certain aspects of data analysis in each country.

It is important to note also that the analytical phase of the study will draw to the extent possible on other useful existing data and methods for analysis, such as the ImpACT model developed by EURICSE to measure social and economic impact of cooperatives and social enterprises (with an emphasis on social purpose cooperatives) looking at work integration. (Borzaga et al., 2014)

- **Methodology:** The research study will use a mixed methods approach, gathering data through survey methodology, focus groups and key informants. A sampling plan will be developed for each country and a representative sample will be drawn, allowing generalization of conclusions. In addition, the Country Context analyses will enable comparisons within countries and across countries to the extent that baseline data are available and as seems relevant. In Poland, attention will additionally be paid to ascertaining relationships between USAID assistance in the cooperative sector to the current situation. OCDC has prepared a request for proposals circulated in Poland in which the services of survey and marketing researches and analysts have been sought to aid with the gathering and analysis of data.
- **Definitions:** For purposes of this research, OCDC will look at the nature of the structure of the organization rather than its name. In other words, if an organization meets the criteria of a cooperative as we define it, regardless of how it is referred to locally, it may be included in the sample. In brief, OCDC will study the effects of local level (primary society) organizations that are member-owned (with equity participation), are member controlled, either distribute profit to members or reinvest it, and generally follow the international cooperative principles.
- **Research Questions and Preliminary Indicators:** The research questions to be posed are set out below. Questions may be further refined as progress with the design is made. It is expected that indicators also will be adjusted and expanded. The intention, however, is that the information gathered be manageable in scope and facilitate the drawing of conclusions and inferences in response to the research questions.
 - How do cooperative members benefit economically from their cooperative membership and participation?
 - *Indicators*
 - *Household income level*
 - *Household assets*

- *Women's economic status*
 - How do cooperative members benefit socially from their cooperative membership and participation?
 - *Indicators*
 - *Age of children in school (girls and boys)*
 - *Educational attainment (girls and boys; women and men)*
 - *Family health status*
 - *Social capital (women and men)*
 - *Increased agency (women and men)*
 - How do communities benefit economically from the presence of cooperatives?
 - *Indicators*
 - *Local GDP*
 - *Infrastructure*
 - *External investment*
 - *Endogenous growth*
 - How do communities benefit socially from the presence of cooperatives?
 - *Indicators*
 - *Health service availability*
 - *Educational service availability*
 - *Community engagement and participation*
 - *Multi-functional development*
- **Data Analysis and Interpretation:** Data gathered from surveys, key informant interviews and focus groups will be analyzed and interpreted using available baseline data. Results and research findings will be made available following the completion of the pilot study in Poland (projected for December 2017, January 2018). In addition, in parallel with the analysis of the Poland study, adjustments to the approach will be made in preparation for the multi-country roll out of the further research in 2018 in three to four regionally diverse countries with reasonably mature cooperative movements. We are aware of various analytical tools that have been developed and are potentially useful to this study, and in our approach to data analysis, beyond regression analysis and interpretation, we plan also to explore the possible use of these, such as the EURICSE-developed ImpACT indices⁴ that measure social and economic cost benefits of cooperatives and, also developed by EURICSE, an input/output measurement tool, that studies the economic impact of cooperatives.⁵
- **Current Status and Next Steps:** Following completion of the Poland Context Study, consultation with OCDC stakeholders and members, finalization of overall study design and initial conceptualization of surveys and other data gathering tools, OCDC has issued a Request for Proposal (RFP) in Poland seeking institutions, companies or consortia to bid on executing the study. The anticipated award of a contract is the beginning of July 2017, with all data collection and analysis, and development of preliminary findings to be complete by the end of the year.

⁴ The ImpACT measures have been applied in Northern Italy.

⁵ This methodology combines the Tourism Satellite Approach (TSA) method with input/output analysis that looks at direct, indirect and induced impacts.

Following the literature review conducted for the Poland Country Context analysis (see section immediately following), we carried out an informal assessment of capacity to execute certain aspects of the research study. This process involved informal outreach to authors of previous research studies, to market research companies, and to universities and academic research institutions.

Poland Country Context

OCDC has completed the *Poland Country Context*⁶ report (Czachorska-Jones, 2017) based on a desk review of available literature and statistics and have used it as a basis for informal discussions with researchers and others as well as for guidance for the further conceptualization of the study. The *Poland Country Context* report provides a comprehensive overview of the cooperative sector in Poland, covering its history and evolution, its place within the economy and society today, as well as an analysis of cooperatives by sector. The picture it paints is a mixed one, with, on the one hand, negative views and a widespread perception of weak cooperative performance and, on the other hand, local level acknowledgement of the cooperative principles, national level rhetoric re-connecting cooperatives to their historic roots, an increasingly Europe-oriented perspective and approximately 2.5% of the Polish workforce employed by cooperatives. The OCDC Poland Country Context Report is available from OCDC Research Group (upon request).

Poland has a long history of cooperatives stretching back to before World War II. However, the literature tells us that this legacy has largely been subsumed by more recent events prior to Poland's transition to a market economy and joining of the European Union. In the period 1945-1989, cooperatives across sectors were largely coopted by the state to advance national policies and programs. In partial consequence of that legacy, cooperatives today suffer from two "perception problems" – (1) they are part of the "old" order and (2) they are not dynamic or useful for today's economy.

Ironically, in Poland as in similar situations, where social capital is low, cooperatives do not appear to be seen as a vehicle to enhance it except insofar as cooperatives address the needs of the more marginalized groups suffering from social exclusion and unemployment (Giza-Poleszczuk & Hausner, 2008). However, even there the potential ". . . of enhancing the social capital that is accumulated at local level is jeopardized when such institutions work in isolation and when their establishment is prompted by external actors, rather than being authentically strived [sic] by local forces." (Giza-Poleszczuk & Hausner, 2008)

With respect to the role of the cooperative sector in the national economy in Poland, comparisons between 2009 and 2015 show a decline in numbers of cooperatives, numbers of members and numbers of employees, notwithstanding that Poland ranks fourth or fifth in Europe (in a group that includes Germany, France, Italy, France, and the United Kingdom) on these factors. However, in these same countries there seems to have been a period of consolidation as they also exhibit a decline in numbers

⁶ Although the goal of the multi-country study is to reach conclusions across countries and sectors, which in turn will impact national policy as well as cooperative practice, it is also recognized that variability among countries and cultures do bear on whether and how cooperatives are successful. An important element in each country study therefore is to be a Country Cooperative Context analysis

of cooperatives but generally also simultaneously (Poland being an exception) show an increase in cooperative membership. (Czachorska-Jones, 2017)

We did not find comparable turnover data for the period 2009 – 2015. However, the reported turnover figures in relation to the membership provides some unexpected results if the decline in numbers is seen as a decline in the sector. In terms of turnover per cooperative member, Poland can be seen to be reasonably strong, falling between France/Germany and UK/Italy. These results are shown in the following table.

Table 1.1 Comparative Cooperative Ratios in Selected European Countries⁷

| Country | 2015 Coop Members | 2015 Coop Turnover Euros | Average Turnover per Member -- Euros |
|----------------|-------------------|--------------------------|--------------------------------------|
| France | 26,100,000 | 306,900,000,000 | 11,759 |
| Germany | 22,200,000 | 195,000,000,000 | 8,783 |
| Italy | 12,600,000 | 150,300,000,000 | 1,193 |
| United Kingdom | 14,900,000 | 52,100,000,000 | 350 |
| Poland | 7,900,000 | 14,500,000,000 | 1,835 |

The analysis in Table 1.1 indicates that the decline in numbers of cooperatives and members in Poland may not tell the “whole story.” For example, the UK, which ranks **just ahead** of Poland in both membership and turnover, provides an interesting point of comparison: Membership in the UK increased *from 8.4 million to 14.9 million in the period 2009-2015, while membership in Poland declined slightly from 8 million to 7.9 million.* In 2015, however, following this appreciable increase in cooperative membership, with the UK reporting a Euros 52.1 billion turnover and a membership of 14.9 million, turnover per member is approximately **Euros 350 per member.** Comparing this number with that of Poland, following a *decrease* in membership, Poland reported Euros 14.5 billion turnover and a membership of 7.9 million or approximately **Euros 1,835 per member.** These numbers compare with Euros 11,759 turnover per cooperative member in France; Euros 8,783 in Germany, and Euros 1,193 in Italy, placing Poland in the middle range of these European countries with respect to this ratio and perhaps therefore with respect to both actual and potential productivity.

Adding to the complexity of the cooperative situation in Poland, the transition to a market economy not only “changed all the rules,” but also has failed to clarify the new ones. There has been a wide restructuring within the sector, with many bankruptcies and other failures since 1989 when the economic transition began in earnest. At the same time, however, the legal and regulatory framework, while undergoing change and adjustment to conform to the changing economy, has itself failed to provide sufficient policy and other clarity to instill deep confidence. For example, the 1982 law on cooperatives still stands but has been amended 32 times, with proposed changes still being brought regularly to Parliament.⁸

⁷ Analysis based on data retrieved from Poland page, <https://coopseurope.coop>. [The Power of Cooperation. CooperativesEurope key statistics 2015].

⁸ Stawicki Robert, Zarys spoldzielczosci w Polsce. Mechanizmy wspierania krajowej dzialalnosci spoldzielczej [Overview of the Cooperative Movement in Poland. Mechanisms of Supporting Local Cooperative Activities]. OT-644, Bureau of Analysis and Documentation of the Chancellery of the Senate, 2016, 37-38.

As a member of the European Union (EU), however, Poland is required to conform to EU laws and binding regulatory provisions, which – with greater nuance than there is space for in this paper – value and protect the “social economy” in which cooperatives play an important part through income generation, job creation and entrepreneurship (Czachorska-Jones, 2017). This view to Europe itself may provide an encouraging stimulus to the cooperative sector linking it to pre-Communist tradition in Poland and at the same time expanding its consideration to fit within a more broadly understood “social enterprise” framework that values “entrepreneurship” in the pursuit of goals that serve a social purpose, limit and re-distribute profits, and that “fulfill crucial social and economic tasks aimed at promoting the interests of the community at large...” (Giza-Poleszczuk & Hausner, 2008)

Observations from the Literature

OCDC seeks to develop new knowledge with the multi-year, multi-country research study “What Difference Do Cooperatives Make?” We seek here to understand “in real time” the impact that cooperatives have had and are having on the social, economic and community well-being across sectors and countries. At the same time as we develop this knowledge with a focus on the primary societies and their members and communities, we will also consider the relationship of our findings to elements that are documented in the literature as having a determining effect on the success of cooperatives.

These success factors include:

- An enabling legal environment and economic conditions that favor business success. These include: Legal provisions that protect democratic member control, autonomy and independence, voluntary membership, and economic participation in cooperatives and provide a level playing field for cooperatives to compete with other enterprises (e.g. no pricing limitations on cooperatives), simple registration and reporting requirements, and auditing transparency. (DFID, 2010)
- Access to credit is necessary for success. The amount of capital that can be accumulated by credit cooperatives operating at the local level is usually quite low. Cooperatives need capable management and governance and the ability to adapt to prevailing business conditions. Cooperatives must develop professional management, be democratic, inclusive, fair, and transparent and have strong leadership. Many cooperatives are inhibited by over-regulation by government (DFID, 2010).
- Autonomy and freedom from government control has a positive correlation with success, although well-targeted government support can be a positive influence. In Ethiopia, US technical assistance has helped overcome this legacy (Assefa, 2007). Cooperatives often fail without a market-driven approach that allows them to compete; however, whether and how they can gain a competitive advantage through professional management, operational and financial efficiency, high quality products, and competitive pricing (OCDC, 2007) are also key questions.

<http://www.senat.gov.pl/gfx/senat/pl/senatopracowania/141/plik/ot-644.pdf>. Lack of stability of legal environment was pointed out by 68.2% of respondents of one study as one of the biggest problems in managing cooperatives.

- Many cooperatives, particularly smallholders, have been helped by the Fair Trade Movement to gain access to markets. In Rwanda, US technical assistance helped two cooperatives qualify for fair trade status, which greatly increased their profits (OCDC, 2007). Successful cooperatives have purposely increased collaboration with other cooperatives. Cooperative networks can help cooperatives to rapidly gain scale and can support better governance and training.

Observations from Empirical Studies Conducted in Poland

OCDC's interest in researching co-operative issues in the context of the changing country environment is by no means unique. While reviewing literature relating to Poland we were particularly interested in references and reports on empirical studies conducted in the course of past 20+ years. We reviewed 29 such studies - by no means an exhaustive list! - which analyzed a variety of broader or more narrowly defined research areas. These areas included:

- Studies of new organizational forms of organizing farmers in the period of transitioning from controlled to market-based economies (particularly, so called Agricultural Producer Groups);
- Studies of cooperative management issues in new market conditions and the search for ways for cooperatives to adapt and to increase performance;
- Studies of social capital and the devastating impact of political and social policies under the controlled societies between 1945-1989;
- Multi-year sector-specific studies, e.g. a study of producer groups and producer organizations in horticulture, or how dairy farmers interact with input suppliers, or a study of social enterprises based on current experience and development potential;
- An inter-disciplinary study of 2015 focusing on current conditions, the role and perspectives of development of rural cooperatives;
- Perceptions' studies to document changes that may have occurred over the years.

The studies reviewed covered a diverse set of research purposes and methods used to gather empirical material. Sometimes they were limited to a selected part of the country, or industry sub-set, or type of cooperative enterprise. They generated substantial amount of data, which can be used to inform, and add-on to OCDC's efforts. What was noticeable was the fact that the majority of studies involved cooperative managers or cooperative boards as sources of information and rarely did they involve cooperative membership directly. This probably reflects the fact that reaching the membership to ensure their participation in any research project is extremely difficult. At the same time, it is certainly OCDC's intention and hope that we are able to get to that primary level in order to determine "What Difference Do Cooperatives Make."

The other key observation based on studies conducted to-date relates to our attempt to focus Poland pilot study on cooperatives that were formed since 1989. Through various types of structural and legal transformations (including bankruptcies, liquidations, or mergers) 'old' cooperatives may have reformed and adapted to continue activities in new conditions while at the same time, new cooperatives have formed to commence business activities. Although the number of these new cooperatives may be smaller, we posit that they reflect a conscious choice of the cooperative form of doing business. By reaching these organizations and their members in our research we hope to better understand their motivations as well as links between the choices they made and the 'difference cooperatives made' in their lives.

Hoped-for Outcomes

The study that OCDC is piloting in Poland will develop new knowledge that will be shared with stakeholders in Poland and in the international cooperative development space. Its findings can be used to contribute to the narrative of cooperatives and when and how they contribute to economic and social inclusiveness and the development of social capital. The findings will also provide new insights about cooperative performance and sustainability in Poland.

OCDC will use the learning from design and implementation challenges in Poland to ease the way in the other countries that will be selected to complete the study. Through the multi-country study, we will gain specific insights into cooperatives that will illuminate our collective understanding and that will also likely point in exciting new directions that will deepen our understanding of cooperatives in the 21st century. The desired outcome of the multi-country, multi-year research study on the effects on well-being by cooperatives is objective evidence that in turn contributes to a narrative arc that will encourage expanded use and well-adapted “support” for cooperative development.

At an aspirational level, OCDC hopes that the research results – both those from the Poland pilot study and from the subsequent research efforts -- will also provide insights into key emerging areas such as the future of work, the 2030 Agenda for Sustainable Development which aims to eradicate poverty and other “Grand Challenges” that we collectively face as a planet.

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