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Thomas Streifeneder

Electronic version

URL: <https://journals.openedition.org/rga/2783>

DOI: 10.4000/rga.2783

ISSN: 1760-7426

Translation(s):

Le système coopératif dans les régions de montagne : un outil de gouvernance pour les petites entreprises - URL : <https://journals.openedition.org/rga/2784> [fr]

Publisher:

Association pour la diffusion de la recherche alpine, UGA Éditions/Université Grenoble Alpes

Electronic reference

Thomas Streifeneder, "Cooperative Systems in Mountain Regions: A Governance Instrument for Smallholder Entrepreneurs", *Journal of Alpine Research | Revue de géographie alpine* [Online], 103-1 | 2015, Online since 28 May 2015, connection on 08 December 2022. URL: <http://journals.openedition.org/rga/2783> ; DOI: <https://doi.org/10.4000/rga.2783>

This text was automatically generated on 8 December 2022.

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Introduction

Thomas Streifeneder

- 1 This is the first time that *The Journal of Alpine Research* has released an issue on cooperative systems, their role, relevance, operational processes and resilience in European and African mountain areas. The six contributions assess the actual and past effects and functioning of rural and agricultural cooperatives operating in different sectors and geographical locations. The authors depict the way the territorial and social capital influence the development of cooperatives, the interrelationships between the actors, and the effect of cooperatives on the business economy of its member's enterprises as well as on the regional socio-economy. The reader can explore the variety of challenges, developments and adaption strategies experienced by cooperative systems and how strongly these are interlinked with and depend on the local and regional conditions. Thus the articles give a comprehensive picture of the current state of different types of rural and agricultural cooperatives, which still are the most common type.
- 2 In the framework of the International Year of Cooperatives (IYC) in 2012, cooperatives were widely recognised as one of the democratic organisational structures which significantly contribute to the growth of social capital, social integration, worksite creation, provision of food nutrition security and the reduction of poverty. In many mountain regions cooperatives constitute a cornerstone of the regional economy, enhancing market access and logistic support to smallholder entrepreneurs. This instrument seems to gain more attention now in times of economic crises, not least because cooperative systems have proved to be relatively resilient structures (Borzaga & Galera, 2012). But cooperative organisations are fragile structures that depend on a reciprocal agreement and engagement of its members. While they build on "[...] the capacity to sell regional [...] products through an established organisation for greater

and more reliable returns for farmers” (Bardsley & Bardsley, 2014¹), they may hinder the alternative paths and development trajectories of its members. Nonetheless, cooperatives can play an important role within alternative societal models (e.g. the common welfare and post growth economy approaches) aiming at a sustainable social transformation process in response to economic crises and globalisation. Social transformations need new types of governance and, in this regard, cooperatives offer many good experiences.

- 3 “The agriculture sector is becoming more technologically sophisticated, commercially oriented and globally integrated; at the same time, migration patterns and climate variability are changing the rural landscape across the developing world. These forces pose challenges and present opportunities for all agricultural producers” (FAO, 2011²). Further major challenges include climate change, lack of suitable financial services, missing commercialisation/market access and high transaction costs (FAO, 2014a); Bernard & Spielman, 2009). These interconnected forces at local and global level compel smallholder entrepreneurs to find sustainable and viable strategies to maintain businesses.
- 4 In the right environments it is feasible to increase the entrepreneurial potential and global and national market competitiveness of micro and small farms within farmers’ cooperatives and collectives. Rural producer organisations represent such a mechanism or effective means because they “can help smallholders aggregate their surplus output, achieve economies of scale in marketing, and bargain for better terms of trade in marketplace” (Bernard & Spielman, 2009³). Cooperatives contribute to maximise the members’ share of the value added, to increase price levels and reduce volatility (Bijman *et al.*, 2012). In general, cooperatives pay high prices for the products because they can often secure significantly higher market prices. Hence, “agri-cooperatives help farmers to meet these challenges and improve their positioning and the economic performance and viability of their members” (Pèes, 2013). Cooperatives support small farmers “to better manage the extreme volatility on agricultural markets and help strengthen their position in the food chain by concentrating the output of their farming members” (Pèes, 2013). They foster rural networks and strengthen cultural values to maintain local identity (Bardsley & Bardsley, 2014).
- 5 The fair trade organisations like the Italian CTM (*Cooperativa Terzo Mondo*) and the cooperative structures in the mountainous region of South Tyrol/Italy can be cited as an example in this context. The South Tyrolean apple growers with an average of 2-3 hectares each, organised in a cooperative, produce more than 10% of the European apple production and compete on international markets. A regional innovation system and network for knowledge (Learning and Innovation Network for Sustainable Agriculture/LINSA) and an established cooperative system have enhanced the global marketing of products produced by small farms by aggregating the offer (FAO, 2014b). In many European, African and Asian countries, cooperatives are responsible for distributing agricultural supplies such as fertilizers, pesticides and seeds, and then the delivery, collection, packaging and sale of members’ output/marketing of goods, also providing business loans and offering training and consulting services to members, as well as assistance in the management and administration of the farms. Members are updated about pertinent market developments and helped in making necessary large technological investments that would be out of reach to individual farms.

- 6 However, there are many supportive policy measures with unclear impact (Bijman *et al.*, 2012). They note that cooperatives and producer organisations experience legal uncertainty in competition law and are affected by high costs due to burden of proof, that there is room for further professionalism for a better positioning in the food chain and that the checks and balances could be improved through, for instance, supervisory boards. The Montpellier Panel (Montpellier Panel Report, 2014) emphasises the need – particularly in the less developed countries – to better understand how value chains could be designed and promoted in a way that delivers more value to smallholder farms reducing their risks and increasing their resilience. Lastly, future research is needed to better understand how the “*beneficial locked-in situation*” of a membership may hinder innovation and alternative production developments.
- 7 The authors of this issue investigated different rural and agricultural cooperatives by using various methodologies. Daniel Ricard studied the processes, structures and forces at work of *Dairy cooperatives in the French mountains* focusing on an evolutionary history approach. He looked at past and current strategies of specialisation which enabled dairy farms to be resilient and maintained despite the increasing difficulties in the socio-economic framework conditions. For this purpose he studied secondary scientific information and specific trade press material completed by empirical enterprise data. The contribution of Alain Mélo “*Fruitières comtoises - From village associations to an agro-industrial district: a mountain story?*” represents a historic assessment in the Franche-Comté of the organisational and entrepreneurial development of specific cheese dairy cooperations. Alain Mélo analyses the mile stones of the internal and external developments and tracks how this system was transferred and implemented in other regions. Through comparing *fruitières* with similar progresses in other mountain areas, he explicates the key elements, which have been responsible to establish this kind of socio-economic form of cooperation. Based on two case studies in the northern French Alps, Françoise Alavoine-Mornas and Sophie Madelrieux, dispute “*Dairy cooperatives: what factors contribute to maintaining mountain dairy farming?*”. The qualitative and interview driven approach reveals interrelationships between the cooperatives, farmers and the territory. They present evidence on the opportunities and challenges of dairy cooperatives in the French Alps. Conducting a comparative survey, Étienne Delay, Marius Chevallier, Éric Rouvellac and Fabio Zottele analysed the *Effects of two wine cooperative systems in France and Italy on socioeconomic factors and landscapes in mountain areas*. They applied a Multi-Agent-System to understand the actions and interrelationships of the actors involved and measured the impact of the cooperatives on the region. In Michel Lompech’s article on *Mountain cooperatives in Slovakia* on the background of the socialist and post-socialist period, it is shown how also historic processes matter. His work on the success factors, driving forces and impacts due to political dynamics considers the influence of specific mountain aspects. The Western Highlands of Cameroon represent the investigation area of Albert Jiotso, Timothy Musima Okia and Henri Yambene. In their article *Cooperative movements in the Western Highlands of Cameroon* they describe factors and successful innovative strategies of adaptability cooperatives applied over time. To do this they followed a participatory research methodology.

8 From the lecture of the articles of this issue dedicated to cooperatives in mountainous environments the following main theses, hypotheses and future research needs can be deduced:

- Cooperatives predominantly help retain smallholder mountain farming and thus contribute to maintaining the landscape, ensuring social integration and providing a stable income. This confirms various previous studies cited above. Such a positive correlation however cannot be applied to all the case studies presented. The effectiveness of cooperatives is therefore linked to specific local and regional framework conditions and operational measures. Future studies may be able to focus on the interrelationship between the external and internal factors determining a sustainable enabling environment of cooperatives in mountain areas. Evidence of success factors is needed to better understand whether and how the cooperative system can bring a halt to the abandoning of farms in the future.
 - Unlike with other cooperatives, there is no model for a “*mountain cooperative*” with specific organisational or operational characteristics: such cooperatives are very dissimilar owing to their socioeconomic environment. Nonetheless they can be classified mountain cooperatives because of their location in a mountainous environment, their production or processing of typical mountain products and their members who farm smallholdings. Consequently, the success, competitiveness and failure of cooperatives do not depend on the location and their products, but – similar to other organisational structures and enterprises – on innovative (quality) strategies and their professionalism.
- 9 The examples presented are largely focused on rural and agricultural cooperatives. Despite their socioeconomic and cultural importance in mountain regions, other forms of cooperatives such as cooperatives of communities (“*cooperative di comunità*”) which run public services in remote areas or social cooperatives are and will be significant ways for making mountain areas liveable in the future. Little is still known about these cooperatives and their functioning and impact in and interlinks with remote and mountainous regions. Future research should not only consider these aspects but also other innovative forms of cooperative and collective actions and how they adapt to the needs and challenges in order to sustainably shape socio-ecological transition.

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NOTES

1. Bardsley & Bardsley, 2014. p. 17
 2. FAO, 2011. p. 3
 3. Bernard & Spielman, 2009. p. 60.
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AUTHOR

THOMAS STREIFENEDER

Head of Institute. EURAC Research, Institute for Regional Development and Location Management.
thomas.streifeneder@eurac.edu