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Decades of Radical Self-Management at a Venezuelan Cooperative: Institutional Distinctiveness and Ideology

Aurélie Soetens, Benjamin Huybrechts, and Ignacio Bretos

Where there is a job to be done,
man is by nature an organizational animal.
He is also an ideological one.
(Carlisle & Manning, 1994, p. 701)

A. Soetens (✉)
HEC Liège, University of Liège, Liège, Belgium
e-mail: aurelie.soetens@mailfence.com

B. Huybrechts
IESEG School of Management, University of Lille, CNRS, UMR
9221-LEM-Lille Economie Management, Lille, France
e-mail: b.huybrechts@ieseg.fr

12.1 Introduction

Cooperatives have always lived on the edge of established categories, disrupting and disorganizing prevailing cultural, political, and institutional arrangements on the basis of alternative practices organized around normative values like democracy, autonomy, participation, equality, and solidarity (Jaumier, 2017; Kokkinidis, 2015; Parker et al., 2014). At the same time, these organizations have to thrive in an increasingly competitive and globalized capitalist economy that imposes significant challenges to the preservation of their distinctive social values and collectivist practices (Bretos et al., 2020; Narvaiza et al., 2017). In this context, it is crucial to explore how cooperatives and other participatory organizations deploy different strategic resources to gain legitimacy in their field while at the same time nurturing their distinctiveness from dominant institutional field arrangements. Indeed, we still know relatively little about "*[h]ow*, and especially *why*, some of these organizations work and are successful in keeping their character as democratic organizations over many years" (Diefenbach, 2019, p. 559).

Institutional theorists contend that radical distinctiveness is generally avoided in favor of "legitimate distinctiveness" (Navis & Glynn, 2011) or "optimal distinctiveness" (Zhao et al., 2017), i.e. a balance between conformity and distinctiveness in which organizations frame their activities in a way that is "as different as legitimately possible" (Deephouse, 1999, p. 148). However, cooperatives that rely on radical forms of self-management do not content themselves with lying at odds with their environment, but they also actively defy widespread social norms, rules, and expectations, and make a virtue of such defiance (Oliver, 1991).

Studies relying on institutional theory have revealed the possibilities of resistance to dominant institutional forces (Lepoutre & Valente, 2012; Marquis & Lounsbury, 2007; Pache & Santos, 2010; Schneiberg,

I. Bretos
Department of Business Organization and Management, University of Zaragoza, Zaragoza, Spain
e-mail: ibretos@unizar.es

2013). However, while these studies emphasize how alternative practices can be strategically leveraged to resist environmental pressures towards conformity, little is still known about the ideological foundations of such practices. This is surprising since ideology is a key strategic asset to enact and preserve alternative organizational practices (Kunda, 2006; Rothschild-Whitt, 1979). In the case of self-managed organizations, such practices are rooted in strong ideals of collectivism, egalitarianism, and autonomy (Kokkinidis, 2015) which, when disregarded—for example, because of the need for greater efficiency and economic consolidation— drive the organization towards degenerative patterns and the loss of their distinctiveness (Meister, 1974; Simons & Ingram, 1997).

Therefore, it appears crucial to investigate how ideologies help resist dominant institutional patterns and preserve alternative organizations' distinctiveness over time, and in particular how such ideologies emerge and endure through time. This chapter thus addresses the following research question: *How is an ideology created, protected, and reproduced within a participatory organization in order to maintain its institutional distinctiveness over time?*

To answer this research question, we draw on an in-depth ethnographic study of Cecosesola, a long-lasting Venezuelan second-tier cooperative. Cecosesola workers have developed and nurtured a radical organizational ideology that has allowed them to sustain a set of distinctive norms and practices organized around self-management over several decades. In this way, Cecosesola has successfully preserved its institutional distinctiveness against prevailing organizing models and patterns in the field.

Our study makes a threefold contribution. First, we contribute to a key debate within institutional theory, concerning how alternative organizations resist institutional pressures towards conformity. We coin the term *institutional distinctiveness* to describe the process through which alternative organizations make a virtue of nurturing their distinctive organizing patterns and deliberately shield them from the influence of dominant institutions. Second, we contribute to the literature on organizational ideology by unveiling the conditions under which a radically distinctive ideology may be created, sustained, and reproduced over time within the boundaries of a participatory organization. We illustrate how

creating and reproducing a radical ideology can be the foundation for institutional distinctiveness. Third, we add to discussions about the challenges that cooperatives face to preserve their participatory practices, and the strategic resources that can be mobilized to address such challenges, by unveiling how the development of a strong organizational ideology contributes to protecting workplace democracy against external and internal forces towards erosion and preventing degeneration.

The chapter is structured as follows: the next section provides the theoretical framework of the research. The third section introduces the case studied, and details the data collection and analysis methods. The fourth section accounts for the main findings. In the final section, we elaborate on our theoretical contributions, and also discuss the limitations of our study and some promising avenues for future research.

12.2 Theoretical Background

12.2.1 Legitimacy, Institutional Distinctiveness, and Organizational Ideology

Legitimacy is considered a central concept in institutional theory, as it "provides a linkage between the organizational and societal level of analysis" (Dowling & Pfeffer, 1975, p. 131). Legitimacy refers to the congruence between an organization's social values, models of organizing and practices, and the norms of acceptable behavior in the larger social system in which it is embedded (Gulbrandsen, 2011). Accordingly, legitimacy is frequently described as a critical survival factor for organizations (Kraatz & Block, 2008), as it provides the organization with "social acceptability and credibility" (Scott, 2001, p. 58).

Institutional theorists typically suggest that organizations developing organizing patterns that deviate from "normal" and socially expected ways of doing business pay a high price for their difference (Gulbrandsen, 2011; Huybrechts et al., 2020). The "liability of newness" (Aldrich & Fiol, 1994) is even higher for unconventional organizations that must struggle to secure social acceptance, support, and justifications for their activities (Meyer & Rowan, 1977). The literature also argues that

organizations departing from prevailing organizational templates face economic, cognitive, and social challenges as innovation increases risks, requires more reflexivity, and reduces legitimacy (Phillips et al., 2000). Finally, organizations situated across or outside established category boundaries face an illegitimacy discount as their purpose cannot be easily captured by external audiences (Zhao et al., 2013; Zuckerman, 1999), who lack the shared understandings and interpretations of what is expected from such organizations (Suddaby et al., 2010).

To compensate for the lack of legitimacy, organizations nurturing institutional distinctiveness need to reproduce an internal system of social processes and obligations that take a rule-like status within the organization (Meyer & Rowan, 1977), as well as collective cultural frames that define the desired outcomes and approve the means to achieve them (DiMaggio & Powell, 1991). In that regard, ideology is a key strategic asset on which organizations can rely to guide workers' actions and mindsets towards continuously challenging prevailing norms for action and rules of conduct, and developing a radical form of alternative organization.

Ideology is the articulated and coherent system of ideas that help to make sense of the social reality faced by a collective. It is a subset of culture that refers to meanings that are self-conscious and authoritatively articulated, as opposed to other subsets which fall under common sense, tradition and "taken-for-grantedness" (Geertz, 1973). Ideology includes ideas about what outcomes are desirable and how those can best be achieved (Simons & Ingram, 1997). It "portrays the company as a morally sound, organic, undistinctive community and defines a member role founded on the internalization of appropriate beliefs and emotions along with abstract and rather ambiguous behavioral prescriptions" (Kunda, 2006, p. 218). It is a system of ideas that, in addition to being a guide to understanding, thinking and feeling, is also a clue to action (Kunda, 2006; Wilson, 1973). In sum, ideological beliefs involve both a social critique *and* a proposed solution, in the form of an alternative social order and prescribed attendant individual and collective behavior (Fine & Sandstrom, 1993).

Organizational beliefs and behaviors which are critically infused by ideology play a key role in the selection of strategic goals and the adoption, legitimation of, and support for the specific organizational practices designed to achieve those goals (e.g. Brown, 1985; Goll & Zeitz, 1991; Tilcsik, 2010; Ven & Verelst, 2008). In particular, ideology emerges as an important resource for alternative organizations to be less influenced by external constraints and to neutralize potential threats that could compromise the maintenance of their distinctiveness. For instance, Simons and Ingram (1997) found that the degree of kibbutzim's adherence to their distinctive Zionist-socialist ideology substantially determined the ability of these organizations to preserve their alternative practices and resist isomorphic pressures from the capitalist environment. Meanwhile, Scott (1967) concluded that organizational practices sustaining work integration of blind people in sheltered workshops were replaced by practices prioritizing commercial goals and employment of sighted workers, as the distinctive ideology of these organizations gradually diluted in the context of growing discrepancies between official and operative goals in an increasingly competitive setting.

In addition, nurturing a shared, distinctive ideology in alternative organizations is crucial to "calm internal dissensions" and "present a united front to the world" (Kanter, 1968, p. 502). Ideological coherence is particularly relevant during periods of organizational change, in which ideological sensemaking is central to re-assuring stability and attenuating fear for the future (Maclean et al., 2014). To achieve such ideological coherence, organizations can first mobilize specific recruitment procedures, which require the definition of membership conditions and duties (Battilana & Dorado, 2010; Rothschild-Whitt, 1979). They can also set up education and socialization processes (Chen, 2009; Lalich, 2004), which can be performed in specific training centers (Basterretxea & Albizu, 2011) or through informal mechanisms such as self-managed teams (Sauser, 2009). Ideological coherence may also be achieved through normative control and collective discipline, that is, by setting up a "mental cage, made up by cultural material" (Kärreman & Alvesson, 2004, p. 160) which binds actors to a specific social system and ensures their compliance with and commitment to its ideology.

Participatory organizations, as organizations that embody alternative practices based on values such as democracy, autonomy, and solidarity, and are generally embedded in adverse institutional settings, form a rich setting to examine how the creation and reproduction of a radical ideology can help alternative organizations maintain their institutional distinctiveness over time.

12.2.2   Participatory Organizations

Participatory organizations are defined here as organizations relying on advanced forms of worker participation including involvement in ownership and return rights on the profits, and formal participation in decision-making (Defourny et al., 1985). Participatory organizations, such as worker cooperatives, differentiate themselves from traditional businesses in several ways. They rely on a set of distinctive organizational values and practices such as voluntary and open membership, democratic member control, preference for reinvesting profits within the project, and strong anchoring in the local community (Leca et al., 2014; Cheney et al., 2014). They usually develop team and family-like work practices, which encourage mutual trust, social capital, and belonging (Dufays et al., 2020; Saz-Gil et al., 2021). In addition, the community feeling experienced by workers within participatory workplaces may be reinforced by distinctive language and style of dress, communal work effort, sharing of personal goods with the community (Kanter, 1968), "we-consciousness" (Blumer, 1953), as well as "we-comfort" (Kärreman & Alvesson, 2004). All these elements lead participatory organizations to orient their members towards a shared identity (Nelson et al., 2016) rooted in a commonly defined and distinctive ideology (Kunda, 2006).

Such distinctive ideology and its attendant practices are, however, difficult to maintain over time due to both internal dynamics and external pressures pushing participatory organizations to prioritize financial concerns at the expense of democratic governance (Bonin et al., 1993; Bretos et al., 2020; Latinne, 2014; Meister, 1984; Miyazaki, 1984; Potter, 1891; Simons & Ingram, 1997). Participatory organizations also face pressures for increased hierarchization, specialization of roles and

tasks, and commensurate salaries and working conditions, conveyed by external actors such as public authorities, the educational system, the media, but also often by the workers themselves (Battilana et al., 2018; Pansera & Rizzi, 2020; Vieta, 2020).

Extant research has highlighted several factors allowing participatory organizations to preserve their alternative practices and prevent their degeneration over time. These include the enactment of countervailing discourses emphasizing democracy, social transformation, and community development (Barros & Michaud, 2020; Eikenberry, 2009); the reinforcement of broad-based participation both at the shopfloor and strategic management levels (Bretos & Errasti, 2017; Storey et al., 2014); the updating and institutionalization of cooperative education and training (Basterretxea & Albizu, 2011); the permanent requirement for accountability and the engagement of external stakeholders in dialog and action (Narvaiza et al., 2017; Ramus & Vaccaro, 2017); the use of sortition to select worker representatives in major decision-making bodies (Pek, 2021); as well as the overt critique of managers and the use of schoolboy humor to undermine their credibility and limit their claims to authority (Jaumier, 2017).

It is also argued that the establishment of formal networks and alliances provides participatory organizations with critical resources to protect their distinctiveness (Pansera & Rizzi, 2020). For instance, the creation of a network allowed European renewable energy cooperatives to overcome legitimacy challenges and institutionalize their alternative practices through various actions involving criticism of the extant parameters of the institutional field, conciliation between members' rules and practices, and effective communication of the advantages of such alternative practices towards external audiences (Huybrechts & Haugh, 2018; Huybrechts et al., 2020). Similarly, the setting up of the Mondragon federation prompted the spread of cooperatives in the Basque Country and played a key role in ensuring the member cooperatives' adherence to a set of collectively defined principles and values organized around democracy, autonomy, education, and social transformation (Bretos et al., 2020).

In sum, participatory organizations must struggle to preserve their institutional distinctiveness—that is, to maintain the boundaries that

isolate them from the pressures of the external environment—and to reproduce their distinctive organizational practices and values over time. While extant studies have revealed different practices and strategies to resist pressures towards conformity, there is a dearth of research about the role of organizational ideology in shaping and sustaining such type of resistance. Our case study of Cecosesola aims to theorize the internal and external work that participatory organizations and their workers may undertake to create and reproduce a specific radical ideology allowing these organizations to preserve their institutional distinctiveness over time while securing an acceptable degree of legitimacy in the institutional field.

12.3 Methods

12.3.1 Research Context

Cecosesola is one of the wider reaching, more radical, longer lasting, and yet little researched participatory organizations in the world.[1] Cecosesola was created in 1967 as a second-tier cooperative providing administrative services to its affiliated co-ops and cheap funeral services to the members of those co-ops. Cecosesola functions at the same time as a second-tier co-op gathering 29 cooperatives (including worker co-ops, producer co-ops, and multistakeholder co-ops) and almost the same number of community-based organizations, and as a primary worker co-op gathering 629 worker-members (in 2014). The whole Cecosesola network today produces, transforms, and retails food; provides health, credit, and funeral services; distributes home appliances; and organizes community education activities. Some organizations incorporated in the Cecosesola network develop a single activity (e.g., agricultural production, or food supply), but most of them are active in different sectors at the same time, including the Cecosesola worker co-op itself. The entire network consists of around 20,000 members, among which around 18,700 are

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[1] Cecosesola has received the Right Livelihood Award 2022, for developing an alternative societal model that supports its community and members in all aspects of life.

consumers; 1,000 are workers; and 300 are producers. Health, funeral, and credit and savings services are accessible to the members only, while the food supply is available to the whole community. Member organizations are managed independently, but maintain close ties with the Cecosesola network.

This study centers on the Cecosesola worker co-op itself, whose 629 worker-members spread as follows: the Cecosesola food markets (539); the Cecosesola healthcare center (68); the Cecosesola funeral home (19); and the rest provided credit, sales, administrative, and education services (13). Membership is a necessary condition to work at the Cecosesola co-op. For its workers, Cecosesola is a way to collectively respond to the community's needs, by providing them with access to basic goods and services at a low price. Cecosesola's goal is also to trigger a "communitarian, economic, cultural and social transformation", through "respect, solidarity, equity, criticism, responsibility, commitment, communication, transparency and honesty" (Cecosesola, 2002, Article 2). The Cecosesola co-op is entirely self-managed by the workers, who rely on practices anchored in these core values, such as regular job rotation, consensus-based decision making, equal salaries—the salary being an advance payment of future revenues, called *anticipo*—and equal working conditions. Hierarchy is formally absent and coordination is performed in groups and in rotation, providing workers with a holistic vision of, and strong identification with, the cooperative.

12.3.2   Data Collection and Analysis

Organizational ethnography, as "the art of exploring the complexities of everyday organizational life through immersion" (Ybema & Kamsteeg, 2009, p. 103), is a research method particularly suited to elucidate "how organizations are socially and materially constructed through activity and effort" (Nicolini, 2009, p. 120). This method empowers the researcher the examination of the entire process of ideological formation, from the conception of the ideology to its enactment and workers' responses (Kunda, 2006).

The first author spent four months working at the Cecosesola co-op, at the end of 2014, performing a wide variety of tasks, from cooking and cleaning to visiting producers and controlling the quality of fruits and vegetables. She participated in 225 hours of sectoral and cross-sectoral meetings, taking field notes summarizing meeting contents and registering exact quotes that illustrated Cecosesola's distinctive organizing pattern, and helped reveal the ideological foundations of the self-managed practices. She also stayed at four different workers' homes during the whole research period, which gave her access to a considerable amount of sensitive data regarding workers' underlying motivations and comprehension of self-management. Due to the relatively short time of her stay, she was not attributed a fixed role at the cooperative, but provided support within different sectors, in a rotative way depending on where she was needed most. In this way, she could hold a large number of informal conversations with workers of all ages, genders, roles, and seniorities. She registered part of those conversations in the form of exact quotes.

Through an abductive process, the authors actively tried to reach empirical material that enabled them to construct a new interpretive theory that would help resolve the surprise of the empirical phenomenon (Alvesson & Kärreman, 2007), i.e., the maintenance of radical self-management over several decades. Initial data from participant observation and field notes allowed the authors to identify 94 relevant organizational processes, tools, and activities enabling the maintenance of self-management. Next, and while considering data and theory in parallel, the authors collected additional data, from 2015 to 2021, drawing on a diversity of sources. In doing so, they pinpointed the ideological foundations of workers' actions. To clarify workers' efforts to sustain self-management over time, they organized the data around three dimensions: the emergence of an alternative organizational ideology; its protection against the backdrop of adverse external pressures; and its reproduction over time within the cooperative.

12.4 Findings

12.4.1 Emergence of an Alternative Organizational Ideology Guiding Workers' Actions

Trigger Point in the Cooperative's History

A key period in the life of the cooperative covers the incidents unfolding between 1974 and 1983. In 1974, Cecosesola's workers launched a cheap public transportation service. The cooperative successfully ran the bus service for a couple of years, and in 1979 it consisted of 300 workers. That year, however, the Municipal Council demanded that tariffs be aligned with other providers' fares, and, as Cecosesola's workers refused to comply, public authorities stopped paying the cooperative the subsidy due to every transportation company.

As a reaction, Cecosesola's workers called for a bus strike, started a public awareness campaign, and organized repeated protests. In turn, the Regional government initiated a propaganda campaign and extensively used the media to turn public opinion against the cooperative. The fight prolonged for some time, until one night in 1980 the local police arrested several of the workers and confiscated their facilities and buses. Cecosesola's workers continued demonstrating and mobilized the support of other cooperative units from across the country. Finally, they traveled to the capital to plead their case with Congress. A few weeks later, and 140 days after the bus seizure, a court order mandated the municipality to restore the buses to the cooperative.

In addition to this very publicized conflict with the local authorities, Cecosesola suffered an internal discord, equally covered by the media. Unsuccessfully demanding an increase in pay and the creation of a labor union, a small group of workers circulated stories about administrative irregularities. Benefitting from these workers' experiences in unions, and through their political connections, they soon embodied the role of informal leaders and people of influence within the cooperative. Although the independent audit informed of the "good organization and control" of the transportation service and the "good shape" of the buses, this internal contention created division inside the cooperative

and inspired public mistrust in the organization, further altering its relationship with key partners such as the Municipal Council and credit institutions.

By the time both internal and external struggles were settled, the buses were not in running order any longer and the cooperative had accumulated enormous financial losses. In addition, around 160 workers and 70 cooperatives had withdrawn from the Cecosesola network. As a consequence of this internal crisis, as well as the fight with external actors, the Cecosesola co-op went through an important process of organizational change. From then on, the remaining workers decided to exclusively rely on self-financing and to further deepen worker participation. Reflecting on their recent experience, workers concluded that successful participation required regular meetings and the construction of very strong social links. While the actual change in the bylaws only occurred in 2002, factually the workers abolished any form of hierarchy in 1983, turning the cooperative into a wide-scale experience of radical self-management. Concretely, they dissolved executory and supervisory boards, suppressed formal supervision and control functions, developed consensus-based decision making, implemented regular job rotation across the whole organization, and established equal salaries and working conditions for all.

However, they understood that simply creating new structures and working conditions wouldn't foster the desired behaviors, as they recounted later:

> It seems like we were departing from the assumption that, by only decreeing trust along with a change of organizational structure and some equality in the pay assignations, we would be guaranteeing an important transformation in the behavior [of workers]. We were hoping that those conditions would be enough to foster the spontaneous and natural emergence of a being that would be solidary, participatory, responsible and socially engaged. At the beginning, everything seemed quite easy. The reality would be different. (Cecosesola, 2007, p. 71)

Defining the Ideology

The strengthening of the participatory practices came hand in hand with the reaffirmation of explicit core values and principles. Freitez (2012, p. 149) reported this process as such: "The transportation crisis also triggered, from a collective point of view, self-critique and a search for alternatives, as well as a process of change in members' basic conception of organizational practices, transforming [the crisis] into an incentive for the construction of a different organization".

On the one hand, workers started articulating a repeated and explicit critique of the dominant social order, and of traditional organizational forms, to justify the existence of their alternative organization. Decades later, workers still regularly compared during meetings, in organizational documents, and in communications with outsiders, their self-management experience to (undesired) cultural trends in society. Workers pointed out, for example, that "capitalism as much as communism are manifestations of the Western culture; a culture that moves with the intention to foster since childhood individualistic desires of accumulation of knowledge, power and wealth" (Salas, 2017). They also condemned traditional organizations' practices and the unacceptable values that they convey:

> Exactly as the consumerist society sells us the idea of a selfish, individualistic, and mainly irresponsible human being, it also proposes one single form of organization where there are directors and directed, where there is mistrust, where the authority comes from the role, where the responsibility for the most is delegated but in any case it is shared, where everybody tries to accumulate for oneself the biggest amount possible of information, knowledge, money, and ultimately personal power. (Cecosesola, 1990)

On the other hand, workers strengthened their participatory and egalitarian ideals. Exploiting both the fresh start of new activity and the perceived hostile environment, the workers defined explicit underlying values and motivations for their collective project, which are summarized in their current bylaws:

> We declare that we commit to maintain Cecosesola as an organism of cooperative integration, dynamic, open, flexible and diverse; that its organization be the expression of the personal and communitarian processes of transformation. For this purpose, we commit to maintain and cultivate among associates the values of respect, solidarity, equity, criticism, responsibility, commitment, communication, transparency and honesty. (Cecosesola, 2002, Article 2)

Hence, Cecosesola's distinctiveness did not only express itself through participatory and egalitarian practices but also through the motivations underlying these practices. As a worker explained:

> *At the end, the aim of Cecosesola is our personal transformation and the transformation of the society. We want to connect with others. Our aim is not just to sell goods and services.* (A worker at a meeting, August 27, 2014)

In summary, following a major turning point in the cooperative's history, the workers have implemented important changes in organizational practices towards a more radical form of self-management. Simultaneously, they have anchored this new and radically distinctive form of organization in entrenched criticism of the dominant order, and they have explicitly framed alternative values and motivations.

Operationalizing the Ideology

Given the newfound absence of hierarchy—and of written working rules and procedures—workers had to find a way to fill in this void of power, and operationalize the ideology into collective and individual behaviors consistent with the alternative social system that they aspired to create.

The workers, therefore, started using collective criteria, premised on mutual respect, which were the behavioral translation of the values and motivations underlying the desired practices. A collective criterion was, for example, to prioritize collective long-term benefits instead of individual short-term profits. Criteria were reevaluated regularly, usually following the apparition of a problem or crisis that can be internal to the organization (e.g., the uncovering of a theft) or external (e.g.,

the growing food scarcity in the country). They emerged consensually and were continuously reformulated during meetings that sometimes gathered more than a hundred workers.

Since they served as a guide map for workers' actions, collective criteria empowered the workers to make decisions, on the spot, either individually or in small teams, when facing the need for a decision. Workers would later inform, during their weekly management meeting, the other workers of the decisions taken. Ensuring coherence between operational decisions, and therefore individuals' and teams' actions, and collective criteria appeared essential to Cecosesola's self-management process. As such, attitudes not in keeping with the core values—e.g., individualistic behaviors—were severely criticized and condemned.

However, self-assessing the coherence between ideology and practices was not sufficient on its own to sustain Cecosesola's distinctiveness over time. The following two sections explain mechanisms that have enabled Cecosesola's workers to both shield their distinctive ideology from potentially hostile external influences, and to internally reproduce it over the years.

12.4.2 Shielding the Ideology from External Interferences

Despite what might be expected from the political context in Venezuela, the overall environment was consistently perceived as hostile by Cecosesola's workers. External actors (e.g., local government, competitors, and the media) repeatedly criticized the cooperative's existence and practices (Bastidas-Delgado, 2007; Freitez, 2012). Therefore, to be able to maintain their distinctive culture, the workers invested much effort in shielding the cooperative and its ideology from external threats. The cooperative thereby gained some legitimacy in spite of, and even because of, its distinctiveness. Firstly, the cooperative positioned itself early on as a significant socio-economic actor in the region, becoming "too big to fail". Moreover, workers developed a capacity for garnering rapid and effective support, and for using threats when necessary. Finally, Cecosesola reinforced its ideology through connection with like-minded

organizations, and communication on the advantages of their organizational model.

Becoming "Too Big to Fail"

Cecosesola has benefitted since its creation from a strong regional and community embeddedness. Initially created to answer the community's need for affordable funeral services, the cooperative then launched a transportation service whose schedules, routes, and frequencies were established together with community organizations. When the cooperative went bankrupt, in 1983, it was relaunched through an activity of itinerant trade of fruits and vegetables in the most underserved neighborhood of the city. Nowadays, the food markets are settled in the poorest areas of the city.

While addressing this unmet need, Cecosesola grew exponentially, gaining significant economic weight and legitimacy as an organization at the local and national levels. Workers explained that they never had an interest in expanding further than necessary beyond the boundaries of the city of Barquisimeto, but that they "are willing to help [in] implementing cooperative markets in other places" (Escuela Cooperativa Rosario Arjona, 1990)—which they attempted (unsuccessfully) in Colombia, Bolivia, and Egypt. The cooperative regularly welcomed journalists, students, researchers, and anyone who was willing to know more about their experience, contributing to building their legitimacy both in Venezuela and in the rest of the world. In addition to such legitimacy-building, Cecosesola also leveraged its economic weight to negotiate with external stakeholders, including multinational food suppliers and government agencies (for example, when in need of privileged access to scarce fertilizers), knowing that they could easily influence radio or television channels to support their viewpoint.

Moreover, the cooperative was aware of the significant impact it had on the community and constantly communicated numbers as well as positive qualitative impacts to the workers, the customers, as well as to the community at large. In a recent publication, they brought to the fore their "long story of communitarian empathy" by referring to a study

on Cecosesola's societal legitimacy that reported that 95 percent of the respondents sampled from the wider community said they would "help the cooperative if someone tried to harm it" (Cecosesola, 2021).

Garnering Support and Using Threats Towards Opponents

Thanks to its legitimacy and strong community embeddedness, a broader support network was built up over the years, and Cecosesola workers never hesitated to use it to neutralize external threats. Cecosesola workers always nurtured close ties with the community in which they were embedded and with the Venezuelan cooperative movement and did not hesitate to mobilize their support when needed. For example, in 2015, the government tried to impose a new tax law that would have negative consequences for self-managed cooperatives, particularly those relying on associated labor instead of subordinated employment. Cecosesola responded by mobilizing their workers and supporters and organizing public marches, petitions, propaganda in the (social) media, and orchestrated emails sent to public officers.

In addition, the workers nurtured close ties with politicians and other key stakeholders, which helped them to reinforce the legitimacy of their distinctive organizing patterns, or at least shield them from potential threats. For example, at the time of the Venezuelan constitutional change in 1999, Cecosesola's workers lobbied public officials to advance their own proposals for reform of the Cooperative Law; in particular, they argued for a cancellation of the obligation for cooperatives to form supervisory and executive boards.

They have also built a friendly relationship with representatives of multinational food suppliers, who observed the cooperative's healthy commercial relationships and valued its politics of maintaining low margins. In consequence, suppliers often tried to favor Cecosesola over other supermarkets when food shortages compelled them to choose between competitors.

Reinforcing the Ideology

Over the years, Cecosesola workers reinforced their ideology by connecting their experiences of self-management with those of established like-minded organizations from across the world, and by communicating the advantages of their distinctive organizational model—while also emphasizing overlaps with the government's political program.

On the one hand, workers regularly reflected on their organizational model and their ideology by drawing parallels with other similar movements and thinkers, such as the Zapatista movement in Mexico or the Uruguayan ex-president José Mujica's philosophy of life. Similarities and lessons to be drawn were discussed during internal meetings, and were also gathered into organizational publications or informal newsletters sent to their network of like-minded supporters.

Several times, a delegation of a few workers was sent abroad—e.g., to Europe and to the U.S.A.—to exchange experiences and practices with similar collective organizations, and to gather inspiration for solving particular problems that they faced (e.g., how to integrate doctors into a self-managed system requiring job rotation and equal salaries for all workers).

In addition, workers regularly insisted on the wider purpose of their work, and on the fact that "by creating a system of distribution of aliments, a funeral system, a health system, a financing system, [they] are fighting against speculation, reclaiming the right to enjoy a better quality of life" (Cecosesola, 2003, p. 60). When faced with legal threats or the need to negotiate with government officials, they engaged in legitimacy-building work by highlighting the overlaps with targeted parts of the government's agenda, emphasizing for example that Cecosesola could "contribute to the true strengthening of the democratic system" (Cecosesola, 1998). As another example, in an open letter to government officials in the 2015 campaign against the new tax law, Cecosesola workers wrote: "How can we justify that a capitalist organization has priority over cooperatives whose activities fall within the objectives and the priorities of the Plan de la Patria?" When the Cooperative Law was modified in 2001, they highlighted that the old law had placed them

alongside "organizations of little significance, to be protected and supervised, without granting them any major role in the development of our society" (Cecosesola, 2002, p. 8).

12.4.3 Internally Reproducing the Ideology

Our findings show that pressures against the participatory and egalitarian system that Cecosesola's workers have created were not only external but also internal, emanating from the workers themselves. To prevent further internal implosion or dilution of the ideology, the cooperative developed several mechanisms to internally reinforce the compliance with its distinctive ideology, allowing it to reproduce itself over the years and as some workers leave and new workers arrive: procedures for the transmission of the ideology to the workers; incentives for individual alignment with the ideology; and the maintenance of a strong collective discipline based on ideological prescriptions.

Transmission of the Ideology

The high turnover of workers required mechanisms for the transmission of the ideology to the incoming workers. First of all, a selection process at the point of entry was performed. New workers were recruited exclusively through mentoring, which implied that any new worker had to be introduced to the collective by an existing worker, who was in charge of this first step of the newcomer's socialization with the ideology and the general functioning of the cooperative. Recruiting acquaintances was considered one among other vehicles for trust. When workers were questioned for their (mis)behavior, their mentors too, as they were held responsible for the behavior of their recruits, even up to several years later.

The mentoring system, a socialization course for new recruits, and intergenerational transmission of the history of the cooperative enabled new workers to understand the underlying logics of Cecosesola's organization. The past struggles and the victories accumulated over the years, such as the bus seizure story, were kept vivid for new and existing

workers. The latter wrote about these struggles and kept newspaper articles from that period. During meetings, they regularly recalled the cooperative's past, and the fundamental values and motivations underlying their work at Cecosesola. They also readily explained them to people showing an interest in the cooperative (e.g. journalists, customers, politicians). In addition, workers constantly mentioned the fundamental values, motivations, and organizational purpose forming the cooperative's distinctive ideology. Some specific meetings were organized to reflect on their original *raison d'être*. The educative process was adopted by the workers as one of the main features of the cooperative.

However, ideological education was not always easy to carry out. At the main health center, the doctors were the only workers who did not participate in the overall self-managed dynamic. According to the other workers, because they held very specific technical knowledge and because they did not rotate roles within the organization (and thus never encountered the rest of the organization), doctors did not get emotional about the work performed at Cecosesola. Workers in the rest of the organization, by contrast, emphasized that the heart of their dynamic lay in the types of relationships they created with one another.

Individual Alignment with the Ideology

Equally important as the transmission was to ensure continuous alignment with the distinctive ideology. Alignment was secured by ensuring workers' identification with the distinctive process going on within the cooperative: their acceptance that the collective overrules private life: the strengthening of family ties; and the implementation of several pragmatic incentives.

Since the beginning, workers showed identification with Cecosesola's process and affection towards the cooperative. As they recall: some workers already displayed a certain "identification with the cooperative process, even though this was for affective reasons" (Cecosesola, 2007, p. 74). Still today, they regularly use love or matrimonial metaphors to describe their relationship with the cooperative. For example:

> Between me and the food market, it is like a love story. But after a few years, the routine threatens. (A female worker, personal conversation, August 18, 2014)

> It is like a couple [in a] relationship, if there is no communication, everything collapses. (A vegetable provider, personal conversation, August 22, 2014)

To work at Cecosesola, however, workers had to accept that the collective overrules the individual. Within the cooperative, there was very limited opportunity for privacy: tasks were always performed by teams and meals are taken together; workers spent a lot of hours at the workplace—from ten to fifteen hours a day—and had little opportunities for hobbies and leisure time with their families. Raising the subject of the long and hardworking hours was one of the only taboos within the cooperative. Often, non-work-related justifications were required. If workers arrived late at a meeting, or needed to leave early, they had to explain themselves in front of the whole collective. If they wanted a loan that exceeded their savings, they had to justify the purpose of the loan.

In addition, workers capitalized on strong family and friendship ties and worked to strengthen them. They took advantage of the Venezuelan culture of the "nuclear family", and tried to enlarge this family circle to encompass the entire organization (Cecosesola, 2012). Interestingly, when talking to outsiders, workers used "we" statements. They also developed a specific vocabulary adapted to their work reality, and regularly and willingly dressed in Cecosesola t-shirts. Within the cooperative, there was no division by work roles (except for nurses and doctors), by gender, or by age. Everybody sat, worked, and ate with one another, and avoided forming stable sub-groups. The goal is for everybody to closely know everybody else.

> The danger of someone that does not participate and that doesn't allow others to get to know them, that does not share information or relationships with others, is that if one day that person finds themselves in a shitty situation … no one is going to defend them because they never worked to create trust, because others don't know them nor know what

they think of the organization. (A worker at a meeting, September 18, 2014)

Finally, the presence of several pragmatic incentives strongly contributed to individual alignment with the collective ideology, because these incentives encouraged workers to stay in the cooperative and continue benefitting from its many advantages. The benefits of working at the cooperative included: having stable employment and relatively good pay; having secure access to good and diversified food, cheap health and funeral services, and access to credit; or having children participating in leisure activities.

Maintenance of a Collective Discipline Based on the Ideology

Beyond directly acting on individual compliance to the ideological prescriptions, indirect alignment was also fostered through collective discipline. Collective discipline spurred workers' commitment because it relied on very strong peer pressure, along with public denouncement and collective trials in case of perceived incoherent behavior.

Cecosesola's workers were clear about compliance to ideological prescriptions and commitment to the collective (including embracing behavioral changes), as well as the role of the collective in ensuring discipline. They explained that at the cooperative:

> [Since] there is no hierarchy, then there is a power vacuum. And this vacuum here, nothing is filling it. We take care of this vacuum with collective discipline. And there is no necessity for bosses, we need to be the guardians of this discipline. (A worker at a meeting, September 18, 2014)

Perceived misconduct and misbehavior needed to be publicly denounced and were treated within collective trials. Workers found that, when denouncements did not happen on a regular basis, the consequences could be dramatic. For example, at the beginning of the fieldwork, a widespread slackening and generalized lack of mutual monitoring

allowed for a large amount of money to be stolen from the safety deposit boxes of the cooperative. Public denouncements and trials were justified by the fact that bad behaviors spread very rapidly, and that mistakes could be opportunities for improvement. Collective punishment could lead to the temporary (voluntary) exit of a worker, or even permanent exit when peer pressure became too strong because workers felt that the mutual trust had been irreparably broken.

12.5 Discussion and Conclusion

Based on our research findings, we propose several contributions to the literatures on institutional theory, organizational ideology, and worker participation.

Firstly, this research extends the notion of "institutional distancing" (Gray et al., 2015), a process whereby organizations "immunize themselves from sharing the frames and expectations of the field", albeit "without directly challenging dominant norms or existing power relations" (Gray et al., 2015, p. 129; see also Lepoutre & Valente, 2012). One well-documented way of implementing such distancing is the "decoupling" process through which organizational practices are adapted to satisfy institutional prescriptions only in appearance (Meyer & Rowan, 1977). By contrast *we document a more explicit yet less documented avenue of distancing through the notion of "institutional distinctiveness"*. Institutional distinctiveness captures the process through which organizations make a virtue of their alternative organizing patterns, such as worker participation, and shield them from the influence of dominant institutions.

Institutional distinctiveness departs from the differentiation dynamics documented in the strategic management literature to gain a competitive advantage in the market (Chrisman et al., 2005). It is deeper, as it concerns the core organizational structure and ideology rather than products and services or processes (Wade-Benzoni et al., 2002). It is also more radical, as it does not seek to remain within the legitimately accepted set of organizing options and it is publicly advanced as a virtue. Finally, it is more persistent and far-going than punctual deviations described in

the literature (Battilana & Lee, 2014; Goodrick & Reay, 2011; Reay & Hinings, 2009). In addition, the notion of institutional distinctiveness departs from that of "symbolic and material immunity" (Lepoutre & Valente, 2012), as it encompasses the process of creating and allowing the distinctiveness of the organization, but also of sustaining it over time.

We highlight the creation and reproduction of a radically distinctive organizational ideology as a key pathway towards institutional distinctiveness. Understanding the emergence and maintenance of such distinctiveness is relevant as it largely feeds organizational diversity in institutional fields (Kondra & Hinings, 1998; Stiglitz, 2009). In addition, by studying the micro-level organizational processes that shape the positioning of a distinctive organization within its institutional context, we contribute to the scholarly shift from exploring institutional dynamics at the field level towards understanding the micro-level processes that feed macro-level dynamics (Lepoutre & Valente, 2012). Understanding how alternative organizations emerge and develop within hostile environments is relevant in the larger conversation about macro-level transformations, in particular towards more responsible forms of capitalism (Boltanski & Chiapello, 2005; King & Pearce, 2010).

Secondly, we contribute to the literature on organizational ideology by *unveiling the conditions under which a radically distinctive ideology may be created, sustained, and reproduced over time within the boundaries of an organization.* Although the consequences of ideology on the organization are well known (e.g. Brown, 1985; Stewart & Gosain, 2006; Tilcsik, 2010; Ven & Verelst, 2008), much less is known about its processes of its creation and maintenance.

The Cecosesola case study illustrates how a radically distinctive ideology, defined by explicit underlying values and motivations, may emerge in a moment of organizational crisis. It shows how ideology requires both continuous entrenched criticism of traditional organizational forms and surrounding institutional arrangements, as well as continuous framing (e.g., through the definition of shared criteria) to guide workers' behavior and empower them to make individual decisions. Criticism and framing are both important if the organization wants to "become a quasi-institution in [its] own right" (Maclean et al., 2014, p. 546). In addition, the case study suggests

that ideology must be shielded both from external interferences and internal erosion. Protection from external forces can be achieved through strong embeddedness in the community and becoming "too big to fail", as well as *informal* networking practices—as opposed to *formal* inter-organizational networking (Huybrechts & Haugh, 2018; Huybrechts et al., 2020; Pansera & Rizzi, 2020)—which can help reaffirm and preserve the distinctive ideology and practices, in particular, by getting inspiration and emotional support from alternative organizations and social movements that share similar values and visions of the world.

In parallel, protection from internal erosion can be achieved by effectively transmitting the ideology to new workers, ensuring continuous individual alignment with it, and maintaining a strong collective discipline. However, such "concertive control" (Barker, 1993), based on normative rules and values consensus, raises a number of ethical issues (Bourne & Jenkins, 2013). In this regard, collectivist commitment may fiercely punish individualistic behaviors and suppress dissident views (Chen, 2009). Contrary to the case of specialized workers who are harder to substitute, when no specific knowledge is required, the organization is free to define *members' selves* for the workers themselves, with the consequence that workers cannot wallow into situations of ambiguity and alleviate identity tensions through ironic responses (see Kunda, 2006), because by doing so they would immediately be drowned by peer pressure and excluded from the group. Subtle mechanisms, such as peer pressure or mortification processes (Kanter, 1968) in which the greatness of the organization enhances the smallness of the individual, suppress individual interests (Polletta, 2002, p. 213) and deny workers private spaces (Kanter, 1968). By conveying a message that the self is appropriate and complete only when it corresponds to the model offered by the collective, such a system requires that the workers surrender to, and get totally involved with, the collective project, which in turn gives both meaning and direction to their lives (Kanter, 1968). Thus, a too radical organizational ideology reduces freedom of mind to entirely favor the collective's interest (Alvesson, 1991), with the consequence that workers risk "becom[ing] both their own masters and their own slaves" (Barker, 1993, p. 433).

Thirdly, we also contribute to discussions about how participatory organizations may successfully preserve their democratic character over time (Diefenbach, 2019). In particular, *we shift away the traditional focus on economic and managerial analysis of the degeneration and regeneration dynamics* (Ben-Ner, 1984; Bonin et al., 1993; Latinne, 2014; Meister, 1984; Michels, 1915; Miyazaki, 1984; Potter, 1890) *to a more comprehensive understanding of micro-level practices both internal to the organization and at the interface between the organization and its immediate environment*.

Indeed, our case study illustrates that forces towards the erosion of the participation may also result from difficulties to develop alternative patterns from scratch, without any pre-existing organizational template and merely based on a continuous process of trial-and-error; or arise because of national or regional cultures and education systems, which condition workers' perceptions, embodied values, attitudes, and beliefs at the moment they enter the organization. In addition, we add to the debate about the different strategic resources and actions that participatory organizations can mobilize to sustain workplace democracy and prevent degeneration (e.g., Bretos et al., 2020; Jaumier, 2017; Narvaiza et al., 2017; Pek, 2021) by unveiling the critical role played by the creation and maintenance of a strong radical ideology that guides workers' behavior and actions. Finally, we also bring back the study of worker participation to local meanings and everyday experiences (Heras-Saizarbitoria, 2014; Jaumier, 2020). Too often, scholars have tried to "understand a dance by viewing snapshots of the action when you really need to be an observer of the whole process, or better still one of the dancers, to experience and understand the whole performance" (Johnstone, 2007, p. 101). By immersing into the daily experience of an extreme case of workers' participation, we challenge the long-lasting conception that participation is only feasible in small organizations with a stable and homogenous membership (Rothschild & Whitt, 1986).

To conclude, our analysis is subject to a number of limitations that open avenues for future research. First, we focused on one single

extreme case that enabled us to highlight advanced processes of ideo-logical formation and maintenance in resistance to dominant institu-tional arrangements. Moreover, such processes unfolded in the very specific collectivist-socialist context of Venezuela, characterized by polit-ical centrality, judicial inefficiency, underutilization of markets, lack of information, large economic disparities, weak financial institutions, and deficient infrastructures in general. In addition, Cecosesola replicated the behaviors of most Venezuelan enterprises, such as the reliance on influ-ential contacts within the government and the usage of cultural resources inherent to the national culture including strong family ties and collec-tive identity (Berlin, 1996). The work around organizational ideology examined here should thus be considered in relation to the national ideological and institutional context in which it is embedded (Nelson & Gopolan, 2003).

Nevertheless, the study highlighted important barriers underlying the need for institutional distinctiveness even in a context appearing as favorable to workers' empowerment and participatory democracy (De la Torre, 2013; Zúquete, 2008). Future research should thus investigate how different types of institutional contexts encourage or discourage alternative organizational ideologies, and how this may influence the need for strategies towards institutional distinctiveness. For example, would the organization manage to *shield* itself as in the present case, or would it be forced to develop alternative strategies to avoid, or counter, institutional constraints? Likewise, would an organization nurturing another type of institutional distinctiveness develop similar patterns for protecting its distinctive practices against internal erosion and external pressures?

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