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Revealing Hidden Impact: Social and Solidarity Economy Enterprise Networks and Sustainable Development in Developing Countries

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ABSTRACT

The Social and Solidarity Economy (SSE) offers strong potential for sustainable development in low-income regions, yet its enterprises often operate with scarce resources, weak monitoring systems, and limited visibility. These constraints hinder both their capacity to demonstrate contributions to sustainable development (SD) and their own progress toward greater sustainability. Support networks can play a decisive role in overcoming these limitations. This study develops a Sustainability Assessment Framework (SAF) specifically designed for vulnerable SSE initiatives supported by international networks. Following a Design Science Research approach, the SAF was co-created through a participatory, multi-stakeholder process grounded in SSE principles. Adaptable across sectors, it enables comparative evaluation, strengthens learning processes, and supports continuous improvement. Applied to 21 social business initiatives in 7 countries, facilitated by 9 Latin American NGOs, the SAF reinforces the legitimacy of support networks and enhances understanding of SSE's contribution to SD. The findings offer actionable insights for NGOs, policymakers, and scholars.

1 | Introduction

The major challenges facing humanity and the planet demand a global commitment to sustainable development, which is defined as meeting “the needs of the present without compromising the ability of future generations to meet their own needs” (World Commission on Environment and Development (WCED) 1987, 41). Achieving this requires progress in integrating economic growth, social development, and environmental protection, which serve as three interdependent and mutually reinforcing pillars (United Nations 2002).

The Social and Solidarity Economy (SSE) has gained international recognition for its considerable potential to contribute to sustainable development (Council of the European Union 2023; Organisation for Economic Co-Operation and Development

(OECD) 2022a; United Nations General Assembly (UNGA) 2023). Its contributions to the Sustainable Development Goals (SDGs) are wide-ranging (UNGA 2024) and have been documented across diverse sectors and contexts. Furthermore, its principle of territorial embeddedness (Castro Núñez et al. 2020; Guridi and Pérez de Mendiguren 2014) positions the SSE to play a key role in the localization of the SDGs by translating global goals into context-specific practices and solutions (Lee 2020; UNGA 2023).

The efficacy of this model in promoting inclusive employment within vulnerable communities is emphasized by both international organizations (Comisión Económica para América Latina y Caribe (CEPAL) 2022; International Labour Organization (ILO) 2022; OECD 2022b) and academic research (Camargo Benavides and Ehrenhard 2021; Díaz de León et al. 2021; Duque et al. 2021; Lee 2020).

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Despite its promise, SSE entrepreneurial initiatives (SSEIs) operating in excluded contexts within developing countries confront considerable challenges. Frequently, these ventures experience limited autonomy and self-management capacity, rendering them heavily reliant on external support (Arboleda Álvarez and Zabala Salazar 2011; Guridi et al. 2011; Kim et al. 2020; Spencer et al. 2016). Furthermore, the lack of systematic information and robust evaluation and monitoring systems represents a critical issue. This weakness is highlighted in research conducted in contexts of exclusion such as Korea (Lee 2020), Ecuador (Páez Pareja 2023) or Africa (Borda-Rodríguez et al. 2016); by the sector itself (Intercontinental Network for the Promotion of Social Solidarity Economy (RIPESS) 2015), and it is a common concern of the international organizations that promote SSE (Council of the European Union 2023; Di Meglio and Marcuello 2025; OECD 2024). This deficiency not only hampers efforts to showcase the sector's contributions to sustainable development (Bouchard and Salathé-Beaulieu 2021; RIPESS 2015) but also limits the capacity to steer enterprises toward improving their practices (Hartmann and Linn 2008; OECD 2022a).

To mitigate these challenges, external support networks have emerged as indispensable actors. In resource-constrained environments, collaboration with NGOs and other partners provides SSEIs with access to expertise (Borda-Rodríguez et al. 2016; van Lunenburg et al. 2020) and critical resources that spur innovation and the implementation of sustainable practices (Corazza et al. 2022; Lafont-Torio et al. 2023; Parida and Wincent 2019). At the same time, these networks must demonstrate their own impact to reinforce social legitimacy and accountability, particularly amid intensifying competition for resources and heightened public scrutiny. In response, sustainability reporting has become a strategic tool that not only improves the effectiveness of external support mechanisms (Appe 2016; Lee 2020; OECD 2024) but also enhances the legitimacy of both SSEIs and their supporting organizations—an essential factor for attracting investment and entering new markets (Chaves-Ávila 2021; Davies et al. 2019; Kah and Akenroye 2020).

Despite this growing body of work on both the potential of the SSE and the role of support networks, two key gaps persist. First, there is a lack of empirically validated tools that translate SSE principles into actionable sustainability assessment mechanisms—particularly in excluded contexts where information systems are weak and management capacities are limited. Second, although the importance of support networks is widely recognized, there is limited empirical evidence on how these networks can design monitoring processes that both strengthen SSEIs and enhance accountability.

To address these gaps, this study adopts a Design Science Research (DSR) approach to co-create a Sustainability Assessment Framework (SAF) together with an international NGO network and the SSEIs it accompanies, guided by the following research question: *How can an international network evaluate the sustainability of the SSEIs it supports in vulnerable contexts, both to demonstrate their contribution to sustainable development and to improve the management of these initiatives?* The paper presents the design and application of this SAF within an international NGO network operating across Latin America.

The paper is structured as follows: it first introduces the conceptual framework guiding the research, then details the methodology and the SAF design process, and finally presents the results, concluding with a discussion and key takeaways.

2 | Conceptual Framework

2.1 | Support Networks

This study is framed within the context of inter-organizational networks, defined as those composed of multiple organizations linked through multilateral ties in pursuit of a common goal (Provan et al. 2007). Specifically, we refer to groups of formally autonomous civil society organizations with interdependent cooperative relationships based on reciprocity and exchange (Ashman and Sugawara 2013). Networks with bonds of trust among their members learn to collaborate and share, approaching the process of learning and knowledge creation by designing resources that are useful for the network as a whole (Mariotti 2012).

Inter-organizational networks guarantee greater availability of resources and a larger capacity to face the challenges of sustainability (Parida and Wincent 2019) and provide solutions to the specific problems of small companies (Lafont-Torio et al. 2023; Rojas-Lema et al. 2021).

In the context of NGO networks in Latin America, the literature largely focuses on information production processes and international advocacy efforts. However, “little attention has been given to sector-level NGO networks and how organizational practices are diffused and adapted through these networks” (Appe 2016, 190), particularly concerning management practices.

Empirical studies suggest that local NGOs connected to networks are more likely to adopt monitoring and evaluation practices (Marshall and Suárez 2014). Peer influence and member training are primary motivators for implementing performance assessment systems (Cosa and Urban 2023; Lall 2017). Additionally, the SME literature indicates that tools oriented toward group and network collaboration facilitate broader applicability (Johnson and Schaltegger 2016). Thus, support networks provide an ideal environment to foster the creation and use of SAFs.

2.2 | Social and Solidarity Economy Entrepreneurial Initiatives

The SSE has blurred boundaries in terms of conceptualization, terminology, entity types, and regulatory frameworks (Bouchard and Salathé-Beaulieu 2021; Duque et al. 2021; Macías Ruano et al. 2021; Monzón Campos et al. 2020). A key source of this plurality lies in the coexistence of two historical and doctrinal strands: the social economy (ESOC) and the solidarity economy (ESOL) (Pérez de Mendiguren and Etxezarreta 2015; Villalba-Eguiluz et al. 2023). ESOC, with roots in Europe, encompasses cooperatives, mutual societies, associations, and foundations that operate under principles such as voluntary membership, democratic governance

(“one person, one vote”), the primacy of people over capital, and the reinvestment of surpluses in pursuit of collective interest. These principles have contributed to a relatively stable institutional architecture and internationally recognized definitional criteria (Monzón Campos et al. 2020; Villalba-Eguiluz and Pérez de Mendiguren 2019). ESOL, by contrast, emerges from popular and grassroots economic organizations in Latin America (Guerra 2006) and—despite also being used in Europe (Battisti Telles et al. 2020)—follows a distinct trajectory. Its conceptual boundaries are more diffuse, but it is widely understood as a transformative way of doing economics aimed at democratizing economic life, strengthening community autonomy, and advancing social and economic justice (Battisti Telles et al. 2020; Duque et al. 2021; Villalba-Eguiluz et al. 2020).

Despite these diverse origins, there is growing international convergence around a shared identity of the SSE. The 2023 UNGA resolution defines this identity as grounded in voluntary cooperation and mutual aid, democratic and/or participatory governance, autonomy and independence, and the primacy of people and social purpose over capital. SSE organizations put these principles into practice through values—such as care for people and planet, equality and fairness, interdependence, self-governance, transparency, and accountability—that guide their functioning and support the pursuit of decent work and livelihoods (UNGA 2023). From this perspective, the promotion of sustainable development is not merely instrumental but normative, rooted in alignment with organizational mission, principles, and values (Castilla Polo and Gallardo Vázquez 2014; Rincón Roldán and López Cabrales 2021).

Consistent with Villalba-Eguiluz et al. (2020) and Pérez de Mendiguren et al. (2009), this study adopts a principle-based understanding of the SSE, where an organization's transformative potential depends on the degree of coherence between its practices and its underlying values. From this standpoint, it becomes essential to develop mechanisms that enable regular and effective evaluation of progress toward this horizon (Guridi et al. 2011; Villalba-Eguiluz and Pérez de Mendiguren 2019).

This study focuses on a subset of SSEEIs known as “social cooperatives” (Defourny and Nyssens 2017), which balance mutual and general interests to serve a genuine social mission benefiting the broader community or a specific group. In developing countries, many of these enterprises are informally organized or registered as cooperatives (Defourny and Nyssens 2017). Their defining feature lies not in their legal status but in their commitment to a social mission, grounded in shared values and principles.

SSEEI reality in vulnerable contexts, especially in developing countries, presents some specific characteristics. Often established by indigenous or peasant communities in rural and semi-urban areas (United Nations Inter-Agency Task Force on Social and Solidarity Economy (UNTFSSSE) 2022; Veltmeyer 2018), their teams typically have limited business management skills, as highlighted in the diverse realities of Mexico (Díaz de León and Rivera 2019), Australia (Spencer et al. 2016), South Korea (Kim et al. 2020), and India (Lawson-Lartego and Mathiassen 2021). These initiatives are characterized by their integration within

the local landscape (Arboleda Álvarez and Zabala Salazar 2011; Guridi and Pérez de Mendiguren 2014) and the majority of them are modest in size and function within subsistence economies (CEPAL 2022; UNTFSSSE 2022). Difficulties in accessing financing and new markets condition their viability (Kim et al. 2020; Tra Tran and Schaeffer 2024).

2.3 | Evaluating Sustainability in SSEEIs

Sustainability defies a single, universal definition or method of measurement (Hilden and Rosenström 2008; Salas-Zapata and Ortiz-Muñoz 2019). The concept is both rich and complex, encompassing multiple interpretations and applications across academic fields (Salas-Zapata and Ortiz-Muñoz 2019). Therefore, it is imperative that any assessment framework begin by clearly identifying the values and principles that constitute this concept (Sala et al. 2015). Accordingly, the SAF developed in this study is grounded in a set of sustainability criteria (see Section 4.2.4) that function as analytical reference points for evaluation (Salas-Zapata and Ortiz-Muñoz 2019).

Consequently, sustainability assessment tools must be tailored to the specific needs of the context in which they are applied (Whitehead et al. 2020). Their structure and content reflect an underlying interpretation of sustainability and must suit the characteristics of their intended users and operating environments (Bonisoli et al. 2018). As a result, any given assessment framework represents only one possible reading of sustainability among many legitimate alternatives (de Ol et al. 2017).

In operational terms, sustainability assessment fulfills a practical function: its purpose is to support informed decision-making by ensuring that plans, activities, and organizational practices contribute to SDGs (Sala et al. 2015). In this study, sustainability assessment is approached as a management process (Pranugrahaning et al. 2021), which requires instruments capable of measuring, organizing, and communicating sustainability-related information (Johnson and Schaltegger 2016; Schrippe and Duarte Ribeiro 2018).

At the corporate level, the existing literature demonstrates that the universe of instruments for Business Sustainability Performance Assessment is chaotic (Saulick et al. 2023). However, as noted by Mozas-Moral et al. (2025), a review of SSE and sustainability-assessment research in WoS and Scopus reveals a notable scarcity of studies specifically addressing this issue. The majority of existing contributions focus on case studies that evaluate the sustainability of cooperatives based on their contribution to the SDGs, rather than on the development of broader, principle-based assessment frameworks (Mozas-Moral et al. 2025).

Within this context, agricultural cooperatives—one of the main types of SSEEIs included in this study—are typically assessed through approaches that do not fully integrate the social, economic, and environmental dimensions of sustainability. Moreover, existing models rarely incorporate users' values and preferences into the evaluation process (Marcis et al. 2019). A similar gap is identified by Jayawardhana et al. (2022), whose literature review on social enterprise reveals a lack of studies

examining sustainability from the perspective of developing countries and highlights the need for assessment tools applicable across diverse sectors. Taken together, these limitations underscore the importance of advancing empirical research that both validates theoretical models and bridges the gap between SSE discourse and practice (Jayawardhana et al. 2022; Marcis et al. 2019).

3 | Methodology

Given that this research aims to design an innovative SAF specifically tailored for SSEEI operating in excluded contexts within a support network, we adopted the Design Science Research (DSR) approach. This paradigm emphasizes the creation of practical tools to address real-world problems, blending theoretical rigor with practical relevance. DSR has been applied in fields such as information systems (Hevner et al. 2004; March and Storey 2008; Peffers et al. 2007) and organizational management (Andriessen 2004; Romme and Damen 2007; van Aken 2004), and is structured as an iterative search that concludes upon finding a satisfactory solution (Hevner et al. 2004; Simon 1982; van Aken et al. 2007).

Among various DSR methodologies (Dresch et al. 2015; Peffers et al. 2007; Sordi 2021), we chose the reflective cycle (Andriessen 2004; van Aken et al. 2007) as it enables the development of useful design knowledge applicable to other cases within the same class of problems. Figure 1 summarizes the methodological phases followed in this study, as structured according to this approach.

Below is a brief explanation of each phase:

- a. *Selection of a real case facing the identified problem:* A Latin American NGO network that supports SSEEI operating in excluded contexts was chosen. This network seeks to evaluate the sustainability of the collective initiatives it supports, using an approach that aligns with its core principles.
- b. *Solution design using the problem-solving cycle:* This phase entails defining the tool's scope and requirements, gathering relevant background knowledge, and designing the solution. The process is carried out through iterative testing cycles, which promote progressive refinement of the tool and continuous learning among participants—key elements in the design of effective sustainability assessment tools (Becker 2004; de Ol et al. 2017; Schindler et al. 2015). The methodological

framework is grounded in de Ol et al.'s (2017) proposal, which aims to strengthen transparency and shared understanding throughout the design of a SAF. This approach necessitates a thorough explanation of the context, the sustainability concept employed, the indicator selection process, the scoring and weighting methods, as well as the application and reflective analysis of the tool. These components are developed in detail in the following sections.

- c. *Implementation of the designed instrument in the natural context:* After adjustments and validation through the above testing cycles, the tool is applied in the real context of the network for which it has been designed.
- d. *Summative evaluation of the implementation:* This phase involves evaluating the tool through user feedback and design team analysis. Evaluation criteria are based on the initial requirements set during the design process.
- e. *Reflection on the process:* This phase focuses on identifying elements that enabled the successful implementation of the SAF and areas for potential improvement.

The following sections detail the development and outcomes from each research phase. Given the recognized importance of stakeholder participation from the outset of designing evaluation tools (Becker 2004; de Ol et al. 2016; Sala et al. 2015; Schindler et al. 2015; Wiget et al. 2020), we adopted a participatory, co-creative methodology. Within this approach, the involvement of users—namely, the SSEEI who will apply the SAF—was intentionally prioritized over other stakeholders. This decision reflects both methodological and normative considerations: first, users possess contextual and experiential knowledge that is essential for ensuring the tool's relevance, feasibility, and usability in vulnerable settings; second, privileging their voice aligns with SSE principles of democratic participation and autonomy, helping prevent externally driven frameworks that could reinforce dependency or power asymmetries.

Participation was primarily voluntary, with certain users being directly invited to ensure diversity within the network. The process was led by the first author and involved a design team (DT) composed of multiple stakeholders, including SSEEI representatives, network members, coordination team members, academic experts (with the second author serving as an indicator measurement specialist), and collaborating entities. The SAF was co-designed by the DT and refined through user feedback during two iterative testing cycles and the implementation phase. This participatory approach combines two of the categories proposed by Bonisoli et al. (2018) for SAF design:

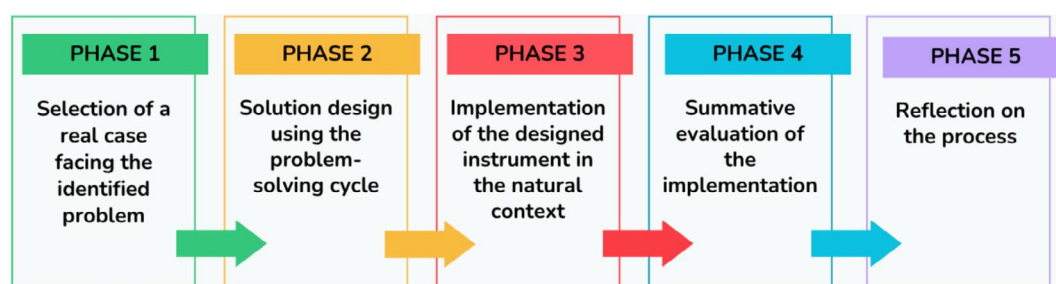


FIGURE 1 | Stages of the reflective cycle.

the top-down dimension-driven framework and the top-down indicators-driven framework.

Overall, the design process engaged 7 DT members, 12 local NGOs, and 27 SSEEIs across nine countries. It is important to note that participation varied across phases: while actors from nine countries were involved in the design and testing of the SAF, the implementation phase—reported in the abstract—was carried out only by SSEEIs in seven countries. Table 1 lists the organizations participating in each stage of the process.

4 | Design Process: Approach and Results

4.1 | Selection and Characterization of the Specific Case

The selected case is *Comparte*, a Latin American network of 15 local NGOs across 10 countries that support SSEEIs promoted by vulnerable populations. Founded in 2011, *Comparte* seeks to strengthen sustainable entrepreneurial initiatives—whether formally registered or not—through sustainability principles collectively defined by the network. These principles cover the social, economic, environmental, and governance dimensions of sustainability, the latter being a key yet often underrepresented element in existing assessment tools (Food and Agriculture Organization of the United Nations (FAO) 2013; Padilla-Rivera et al. 2024; Schindler et al. 2015).

Local NGOs within the network have long-standing trust-based relationships with SSEEIs and strengthen their management capacities through tandems—pairs composed of an NGO representative and an SSEEI representative—who serve as the main users of the SAF.

Like many networks operating in excluded contexts, *Comparte* faced a significant information gap regarding the sustainability of the initiatives it supports, limiting both strategic decision-making and the visibility of contributions to sustainable development. In response, its 2021–2023 strategic plan mandated the creation of a SAF, which this research was incorporated to document and analyze.

Comparte provides an ideal case due to the diversity of SSEEIs it accompanies—ranging from cooperatives to informal ventures across agriculture, livestock, manufacturing, and services. This diversity enhances the generalizability of insights for networks, public institutions, and cooperation agencies working with SSEEIs in similar contexts.

Finally, the network's organizational stability supports the continuous application of the SAF, enabling future longitudinal analyses (Becker 2004; Cosa and Urban 2023; Sala et al. 2015; Whitehead et al. 2020).

4.2 | Solution Design Process: Development of the SAF

Following the Assembly's decision, a Design Team (DT) was formed, composed of seven members selected for their

experience with SSEEIs or their expertise in measurement, evaluation, or programming. The reduced size of the DT facilitated efficient coordination and collaborative exchange. The team guided the overall design process and organized stakeholder participation.

Figure 2 summarizes the key milestones and phases of the SAF design process.

4.2.1 | Scope Definition

The SAF applies to the collective SSEEIs supported by the *Comparte* network across Latin America. These initiatives—ranging from formal cooperatives to informal ventures—operate in subsistence economies, both rural and urban, and reflect a wide diversity of organizational structures, productive sectors, and cultural contexts. This heterogeneity requires a tool that is flexible, easy to apply, and capable of capturing sustainability performance across different types of SSEEIs.

4.2.2 | Definition of Design Requirements

The design requirements define the desired features of the SAF and serve as evaluation criteria throughout the process. They were initially established through dialogue between the DT and the Network Management Board, following a user-centered approach aligned with the needs and capacities of SSEEIs.

- *Functional requirements:*
 - *Principles-based assessment:* The tool must operationalize the seven sustainability principles collectively defined by the network, translating them into measurable elements (Becker 2004; Sala et al. 2015).
 - *Useful information:* The SAF should generate relevant insights for SSEEIs, the network, and collaborating entities (Becker 2004; Wiget et al. 2020).
 - *Universality:* It must be applicable across diverse initiatives, favoring simplicity over precision to ensure broad usability (Hilden and Rosenström 2008).
 - *Comparable information:* The tool should aggregate performance data to facilitate comparisons both within and between SSEEIs. It should incorporate a scoring and weighting system that assesses performance levels for each principle on a 1 to 5 scale using relative benchmarks based on trends or sector averages (de Ol et al. 2016; Speelman et al. 2007).
 - *Capacity building:* Its application should strengthen management capabilities and foster a culture of record-keeping.
- *Operational requirements:*

This SAF should be a self-assessment tool with data collection carried out by SSEEI leaders in tandem with local support staff. Operational requirements prioritize clarity and feasibility across varied cultural and organizational contexts. Key criteria include: the use of clear language, affordable indicators (excluding survey-based ones at this stage), and a user-friendly interface (Cosa and Urban 2023; Hilden and Rosenström 2008).

TABLE 1 | List of participating organizations.

Country	Local NGOs	SSEIs	Value chain	Social base ^a (w/m)	Pilot test	General rehearsal	Implementation SASA23
Bolivia	CIPCA	AFIPA	Processed fruit	26 (4/22)		X	X
		AIPROCARE	Gastronomy	17 (5/12)			X
	ACLO	AEPSIMS—Villa Serrano	Honey	20 (8/12)			X
		MACHERATI—Chaco	Honey	90 (36/54)			X
		Brava Miel-Tarija	Honey	47 (21/26)			X
		QUIRIZA—Potosí	Honey	17 (8/9)			X
Colombia	IMCA	IMCA Hotel	Hospitality	14 (9/5)	X	X	X
		APROCICOL	Citrus fruits	22 (10/12)			X
	SUYUSAMA	Manos Unidas por el Café	Coffee	18 (4/14)		X ^b	
		Red Prod. Agroeco. SPG Nariño	Vegetables	45 (28/17)			X
Ecuador	HdC	ACOMPRESU	Textil	15 (13/2)	X	X	X
		Bon Arte	Handicrafts	10 (9/1)			X
		Lenceria Lenel	Textil	9 (8/1)			X
		APROBUCAM	Shoes	12 (11/1)			X
El Salvador	SCVX	Tienda La Campesina	Services	32 (32/0)		X	X
		Tienda coop. “Cerro de Dios”	Services	31 (23/8)			X
		GAC “Las Hojas”	Financing group	43 (31/12)			X
Guatemala	SERJUS	BioTierra	Organic fertilizers	7 (7/0)	X	X ^b	
		Betzabe-Cantel	Oyster mushrooms	8 (8/0)			X
		Bio Fábrica ADESMA	Vegetables	20 (15/5)			X
		Nuestra Tierra	Vegetables	5 (3/2)	X	X	
Nicaragua	NITLAPAN	Mujeres en Acción	Coffee	20 (20/0)		X ^c	
Paraguay	CEPAG	APAPY	Diversified agriculture	ND		X	
Perú	CIPCA	APPROCAP	Cocoa	180 (31/149)	X	X	X
	CCAIJO	WAYRAQ CUNCA	Dairy cattle	26 (23/3)	X	X	NA
México	YOMOL A'TEL	Ts'umbal Xitalhala	Coffee	216 (16/200)		X	
		Capeltic ^d	Coffee	253 (23/230)			X
		Chabtlic	Honey	39 (3/36)			X

^aTotal number of member families, indicating those represented by women (w) or men (m). The data presented corresponds to the information provided in the implementation of SASA23.

^bData corresponding to the year 2022 were provided and transferred.

^cData from 2022 were provided and transferred. This organization was eliminated for reasons unrelated to this work.

^dThe SSEI is responsible for developing the entire coffee value chain, including the Tshumbal Xitalhala producers' cooperative. Consequently, both initiatives are counted as one in the overall calculation.

Timeline of the SAF design process

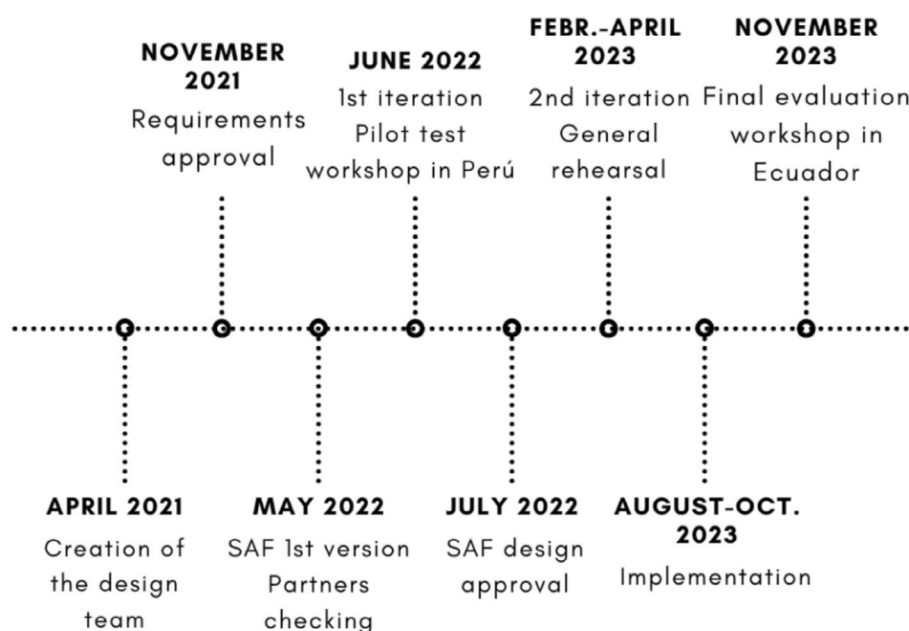


FIGURE 2 | Timeline of the SAF design process.

Overall, the tool follows the logic of a Rapid Sustainability Assessment (RSA), intended to support communication, learning, and awareness-raising by identifying both strengths and areas for improvement (Marchand et al. 2014).

The requirements were validated during the *Comparte* Network Assembly and later refined based on feedback from users and insights obtained during the testing cycles.

4.2.3 | Analysis of Existing Tools and Background Knowledge

Our literature review on sustainability assessment tools for the SSE revealed that most existing tools are designed by researchers or expert personnel (de Ol et al. 2016; Doernberg et al. 2022; Wiget et al. 2020) and typically implemented at the initiative of academic institutions or external funding agencies (Schindler et al. 2015; Speelman et al. 2007). Only a minority of these tools are applied directly by users (de Ol et al. 2016; Schindler et al. 2015). Furthermore, evidence of their application in Latin America remains limited, and no tool has been deployed across an international, multisectoral network of SSEIs (Schindler et al. 2015).

Within the agricultural sector, there is a wide range of sustainability assessment tools, such as SAFA (FAO 2013), IDEA (Zahm et al. 2008), MESMIS (Speelman et al. 2007), or SALCA (Roesch et al. 2021). Some of them have been applied in developing countries—for example, MESMIS and IDEA in Latin America (Pacheco Almaraz et al. 2019; Speelman et al. 2007; Vargas-Prieto et al. 2022), and SAFA and IDEA in Africa (Agossou et al. 2017; Kamau et al. 2022). However, although these tools provide valuable methodological frameworks for assessing sustainability in agricultural production systems, their

sector-specific focus limits their applicability to the multisectoral reality of *Comparte*, which also includes manufacturing, services, and mixed economic activities. As a result, they do not offer the level of cross-sector adaptability required for a network-wide assessment tool.

Given the scarcity of sustainability assessment tools for SSEIs that are applicable across a multisectoral network, the review was extended to other sources and complemented with the sector expertise of the lead author. This broader exploration led to the identification of a sustainability assessment tool developed within an SSE network: the social audit system of Euskadi's Alternative and Solidarity Economy Network (REAS Euskadi) (Guzmán et al. 2024; REAS Euskadi 2011). REAS Euskadi is a regional federation grouping solidarity-economy organizations in the Basque Country (Spain) and promoting shared principles, evaluation standards, and accountability practices within the sector. While conceptually aligned with the type of SAF needed by *Comparte*, its methodological complexity and data requirements exceed the operational realities and capacities of SSEIs in vulnerable contexts.

Taken together, this analysis confirmed that no existing SAF met the combined needs of multisectoral applicability, usability by low-capacity users, and alignment with the *Comparte* network's principles. This gap underscores the relevance and innovative nature of our proposed solution by demonstrating its potential to meet an unmet need. As noted by Hevner et al. (2004), establishing the absence of adequate existing solutions is essential for ensuring the effectiveness and justification of the DSR process.

Finally, the literature on evaluation in vulnerable contexts highlights three essential considerations: the need to build users' capacity to participate actively in the evaluation process (Wiget et al. 2020); the importance of external support

throughout the process (Doernberg et al. 2022; Spencer et al. 2016); and the role of measurement processes in fostering enterprise autonomy and self-management (McLoughlin et al. 2009; Spencer et al. 2016). These insights directly shaped key design choices in the SAF, particularly its emphasis on simplicity, tandem-based support, and gradual capacity building.

4.2.4 | Design of the Measurement Tool

Building on the *Comparte* network principles, the indicators were operationalized following Lazarsfeld's stages (Boudon et al. 1979) through a question-answer approach (Freire et al. 2013), which facilitated collective reflection and supported users with limited abstraction skills. The process unfolded as follows:

1. *What do we want to measure?* The sustainability principles collectively defined by the *Comparte* network.
2. *Which elements of each principle do we want to investigate?* Two or three measurement categories (i.e., topics to be covered) were selected for each principle.
3. *What do we need to know to assess each category?* Two or three assessment questions were defined per category. Table 2 presents the hierarchical structure (principles–categories–questions) and their link to sustainability dimensions.

It is worth noting that the environmental dimension includes fewer categories and questions than the social and economic ones. This imbalance highlights the need to strengthen environmental indicators in future iterations of the SAF, as discussed in the limitations.

4. *What information do we need to answer the questions asked?* Up to six indicators were defined for each question—mostly quantitative or based on predefined response options. Their selection combined theoretical insights and practitioners' experience, ensuring adaptation to local conditions. Indicators were chosen according to the following criteria:
 - *Relevance:* Ensuring the indicators are pertinent to the principles and categories defined (Becker 2004; Bonisoli et al. 2018).
 - *Measurement viability:* Assessing the feasibility of measuring the indicators in the context of the SSEIs supported by the local NGOs (Bonisoli et al. 2018; Johnson and Schaltegger 2016; McLoughlin et al. 2009).
 - *Simplicity:* Ensuring the indicators are straightforward and not overly complex (Bonisoli et al. 2018; Johnson and Schaltegger 2016).
 - *Comprehensibility for communication:* Making sure the indicators are easy to understand and communicate (Becker 2004; Bonisoli et al. 2018; Doernberg et al. 2022; Wiget et al. 2020).

Information availability was not used as an exclusion criterion given the initial scarcity of data, and certain indicators were intentionally retained for their potential to broaden users' understanding of sustainability.

5. *How should the data for each indicator be interpreted?* A scoring method translated indicator results into five performance levels (excellent to very low), defined by the DT based on in-depth knowledge of SSEIs' realities.
6. *What is the level of performance achieved for each principle?* In the absence of external benchmarks, a proportional weighting system was applied to aggregate indicator scores into a principle-level rating.

Table 3 illustrates this process for the first sustainability principle. Some indicators are excluded from scoring and included solely for informational purposes. Full deployment details for all principles are provided in the [Supporting Information](#).

The first version of the measurement tool was reviewed by a group of collaborating organizations,¹ who validated its pertinence. The DT then confirmed its internal coherence and the suitability of the indicators before launching the testing phase.

4.2.5 | Iterative Test Cycles of the Designed Tool

4.2.5.1 | First Iteration: Pilot Test and Workshop in Peru (June 2022). This phase assessed the tool from the users' perspective. Six SSEIs participated, representing diversity in countries, organizational types, and value chains. After completing the tool (initially shared in Word format), participants met in a workshop in Piura, Peru, to discuss their experience and propose improvements.

The pilot validated both the internal consistency of the tool and the methodology used. Participants confirmed its potential to strengthen SSEIs and suggested clarifying certain indicators—mainly by removing overly complex or low-relevance items and increasing the use of list-type indicators for conceptually difficult questions.

Additionally, consistent with the findings of Páez Pareja (2023) and McLoughlin et al. (2009), users emphasized the need for a preparatory training strategy, which was incorporated into the SAF's operational requirements. The pilot also highlighted limited information availability and weak data-recording practices within SSEIs, confirming the relevance of the identified problem and the need to carefully plan completion timelines.

4.2.5.2 | Second Iteration: “General Rehearsal” (February–April 2023). Following approval of the design, the digital interface (Excel-based), the pre-filling training strategy (online workshops and a user manual), and the reporting formats (“mirror” and “radar” reports) were developed. The mirror report consolidates all entered data with automated calculations, while the radar report visualizes levels of development per principle, tracks changes over time, and supports comparisons across initiatives. These formats also inform the annual network-level results.

The second iterative cycle, designated as the General Rehearsal, involved 12 SSEIs supported by 11 local NGOs. Users evaluated the experience through an anonymous survey, and the DT conducted an additional analysis. Results showed that the SAF met

TABLE 2 | Principles, categories, questions, and sustainability dimensions.

Principles	Categories	Questions	Sustainability dimensions
Principle 1—Begin at the local level to develop economic alternatives that extend their impact across broader territorial scales	Territorial construction	1.1. Does the SSEEI contribute to generating new capacities in other people and organizations within its territory, even if they are not part of the SSEEI?	Social
		1.2. Is the SSEEI involved in the development processes occurring within its territory?	Social
		1.3. Has the territorial scope of the SSEEI expanded?	Social/economic
	Food security and sovereignty	1.4. Do the families that are part of the SSEEI enjoy conditions of food sovereignty and security?	Social/economic
		1.5. Does the SSEEI promote supply diversification?	Economic
Principle 2—Prioritize collective construction through a collaborative, multi-stakeholder approach	Multi-stakeholder approach	2.1. Does the SSEEI establish alliances with other local, national, and international initiatives or actors within the territory?	Social
		2.2. Has the SSEEI team taken ownership of the multi-stakeholder relationships it maintains?	Social
	Networking	2.3. Does the SSEEI contribute to the construction of the <i>Comparte</i> network?	Social
Principle 3—Embrace feminist perspectives to promote gender equity and women empowerment	Women economic empowerment	3.1. Does the SSEEI favor the empowerment of women in the economic-productive sphere?	Social/economic
	Promoting women participation in management	3.2. Is women's leadership promoted through positions of representation or executive responsibility?	Governance
	Pro-equity culture	3.3. Does the SSEEI foster a culture of equity in economic and productive processes?	Social
Principle 4—Create decent working conditions	Decent work	4.1. Does the SSEEI provide a decent income that reflects the value of participants' work throughout the entire economic cycle?	Social/economic
	Sustainable work	4.2. Does the SSEEI offer conditions that promote stability?	Social/economic
	Safe and healthy environment	4.3. Does the SSEEI support personal development and ensure a safe and healthy work environment?	Social

(Continues)

TABLE 2 | (Continued)

Principles	Categories	Questions	Sustainability dimensions
Principle 5—Enhance capacities for participation, organization, and advocacy to foster autonomy	Participatory decision making	5.1. Are the levels of participation in decision-making spaces adequate to the diversity of the members?	Governance
	Management and participation capabilities	5.2. Is the SSEEI managed in an autonomous, efficient, and transparent manner?	Governance
		5.3. Does the SSEEI promote leadership and management skills among its diverse participants?	Social
	Common identity	5.4. Has the bonding and commitment of participants to the SSEEI been strengthened?	Social/governance
Principle 6—Revitalize, preserve, and share practices that nurture our common home	Environmental sustainability	6.1. For agricultural or livestock SSEEIs: Do they implement sustainable management of natural assets?	Environmental
		6.2. For all SSEEIs: Are the processes and methods used in production, transformation, and commercialization environmentally sustainable?	Environmental
	Responsible consumption and marketing	6.3. Does the SSEEI promote a culture of responsible consumption?	Social/environmental
Principle 7—Embrace biocultural diversity and foster dialogue and practice around collective, ancestral, and traditional knowledge	Ancestral knowledge	7.1. Is the ancestral knowledge of the territory's culture incorporated or made visible in the value chain?	Social
	Diversity management	7.2. Does the SSEEI manage diversity in an agile and constructive manner?	Social/governance

most requirements: it effectively assessed the network principles, was applicable across sectors and organizational types, generated useful information, and produced aggregated, comparable data in a user-friendly format. Participants also reported that the tool and its reports contributed to capacity building and encouraged a culture of data collection. The tandem-based approach strengthened relationships between SSEEIs and NGOs, enhancing shared learning and trust.

Some adjustments were still required, including refining the interpretation of certain indicators to ensure applicability across organizational models, reinforcing the training strategy, and streamlining the final review process carried out by the network's reviewer/tutor team.

4.3 | Final Implementation of the Measurement Tool (August–October 2023)

Following the adjustments made after the General Rehearsal, the tool was implemented under real network conditions. A total

of 21 SSEEIs and 9 supporting NGOs from 7 countries participated, receiving personalized guidance from the DT throughout the process. After data submission, network tutors reviewed each tandem's inputs, made the necessary corrections, and delivered the corresponding reports to every SSEEI. In parallel, the network team generated the global radar report, which presents the aggregated results for all participating initiatives (see Section 5).

4.4 | Evaluation

After implementation, the SAF was evaluated to determine the extent to which it met the defined requirements. Data were collected through an anonymous online questionnaire, a face-to-face workshop in Guayaquil, and an analysis conducted by the DT. The main findings are summarized in Table 4.

In sum, the evaluation confirms that the SAF meets the defined requirements and effectively addresses the identified problem. The final tool is called the Socio-Economic and Environmental

TABLE 3 | Categories, questions, indicators, and rating system for Principle 1: “Begin at the local level to develop economic alternatives that extend their impact across broader territorial scales.”

Category 1: Territorial development		
Questions	Indicators	Scoring scale
1.1. Does the SSEEI contribute to generating new capacities in other people and organizations within its territory, that are not part of the SSEEI?	1.1.1. Number of training sessions, technical assistance, exchanges, or awareness-raising actions facilitated by the SSEEI for external individuals or communities, whether initiated by the SSEEI itself or upon request. 1.1.2. Number of people in the territory (external to the SSEEI) who have been trained, had their awareness raised, or received technical assistance due to the actions promoted by the SSEEI.	1. No activities of this type have been facilitated for people outside the SSEEI. 2. One or two activities of this type have been offered to people outside the SSEEI. 3. Between three and five activities of this type have been offered to people outside the SSEEI. 4. Between six and seven activities of this type have been offered to people outside the SSEEI. 5. Eight or more activities of this type have been offered to people outside the SSEEI.
1.2. Is the SSEEI involved in the development processes occurring within its territory?	1.2.1. Number of coordination spaces with other stakeholders to improve the development of the territory (including environmental conservation actions and spaces for coordination between public institutions and civil society) in which the SSEEI has participated in the SAF “t” year. 1.2.2. Number of local markets promoted or participated in by the SSEEI.	1. Nobody external to the SSEEI has been trained, had their awareness raised, or received technical assistance by the SSEEI. 2. At least 10 people. 3. Between 11 and 20 people. 4. Between 21 and 30 people. 5. More than 30 people. 1. None. 2. One coordination space. 3. Two coordination spaces. 4. Three coordination spaces. 5. More than three coordination spaces. 1. None. 2. One local market. 3. Two local markets. 4. Three local markets. 5. More than three local markets.

(Continues)

TABLE 3 | (Continued)

Category 1: Territorial development		
Questions	Indicators	Scoring scale
1.3. Has the territorial scope of the SSEEI expanded?	1.3.1. Net variation (i.e., registrations minus deregistrations) of associated and contracted persons in the last year relative to the total. 1.3.2. Annual variation of production 1.3.3. Indicate whether the SSEEI has been scaled up through (purely informative): • Connection with other networks in the territory. • Partnerships with local governments or educational centers. • Union with other organizations in the territory. • Alliances with other institutional or trade actors in the territory. • Other reasons (please specify).	1. Up to –15%. 2. From –15% to –5%. 3. From –5% to +5%. 4. From +5% to +15%. 5. Equal to or greater than 15%. 1. It has decreased. 2. It has remained the same. 3. It has increased up to 10%. 4. It has increased from 10% to 20%. 5. It has increased by 20% or more. N.A.
Category 2: Food security and sovereignty		
Questions	Indicators	Scoring scale
1.4. Do the families that are part of the SSEEI enjoy conditions of food sovereignty and security?	1.4.1. Approximate proportion of the food consumed by the families of the SSEEI that is generated on their own farms (or equivalent): a. No food is produced for self-consumption. b. Up to 20% of the food consumed by families is produced on their farms. c. Between 21% and 40% of the food consumed by families is produced on their farms. d. Between 41% and 60% of the food consumed by families is produced on their farms. e. 60% or more of the food consumed by families is produced on their farms.	7. Response A 8. Response B 9. Response C 10. Response D 11. Response E
1.5. Does the SSEEI promote supply diversification?	1.5.1. List the different product families offered by the SSEEI and identify the most important products within each (purely informative).	N.A.

Note: In valuation ranges defined with “up to” the limit figure is excluded from that valuation range. When “from” is indicated, the figure is included in that valuation band.

TABLE 4 | Results of the summative evaluation of the designed SAF.

Functional requirements	Evaluation findings
Principles-based assessment	The system provided performance level information on the seven <i>Comparte</i> network principles and participants considered the defined indicators to be sufficient.
Useful information	Participants showed very high levels of agreement regarding recommending the tool to other SSEEIs, with an average rating of 9.38 out of 10. They also indicated a high level of agreement that the SAF had met their expectations, with an average rating of 4.25 out of 5.
Universality	There were some difficulties in applying the SAF in savings and credit groups due to their purely savings and credit-focused nature.
Comparable information	There were some inconsistencies and misinterpretations in some indicators, as confirmed by participants requesting further clarifications. This difficulty needs to be addressed in the pre-training strategy to ensure homogeneous and comparable information. Scores in this section ranked from 3.04 to 3.80 out of 5.
Capacity building	Participants expressed that the SAF implementation contributed to: • Building capacity in organizing and recording information, systematizing data, and managing the SAF. • Uncovering new dimensions for performance assessment that had not been previously considered. • Strengthening relationships between local NGOs and SSEEIs and increasing motivation for continuous improvement.
Operational requirements	Evaluation findings
Understandable language	The tool's ease of understanding received a high rating, averaging 8.63 out of 10. However, there were differences in feedback between women, who rated it 8.29, and men, who rated it 8.89.
Affordable indicators	The average completion rate for the tool's indicators was very high, at 94.6%.
User-friendly interface	Satisfaction with the SAF completion process was very high, scoring 9.25 out of 10. However, the workshop revealed that access to computers is challenging in some contexts, and some users are not familiar with Excel. There was also strong agreement that this first implementation encouraged participants to continue using the tool in future years, with an average score of 4.25 out of 5.
Training strategy	Both training strategies—the user manual and workshops—were found to be highly useful, with the manual rated slightly higher at 8.79 out of 10. Women rated the manual more favorably, at 9.33, while men rated the workshops higher, at 8.80.

Audit System (“SASA,” according to the Spanish acronym), and comprises 79 indicators supported by a scoring and weighting system that enables graphical reporting of performance levels for each principle.

5 | Discussion

This research enables reflection on two key aspects of the SAF: the design process within a network context and the results obtained and their corresponding analysis.

5.1 | Design Process

Aligned with the DSR methodology, reflecting on the design process provides valuable insights that can inform similar design efforts (Andriessen 2004; van Aken 2004). In this study, the authors' reflection is based on information gathered during the face-to-face workshop in Guayaquil, the analysis of

evaluations conducted throughout the process, and researchers' observations.

Based on this analysis, several key elements have been identified as critical to the successful implementation of the SAF within a network supporting SSEEIs in vulnerable contexts:

- *Tandem approach*: In contexts with limited managerial skills, pairing local NGOs with SSEEIs not only facilitates the completion process but also strengthens support relationships, provides valuable knowledge for designing effective support strategies, and reinforces the tool's ongoing application. This approach is particularly beneficial for SSEEIs that lack the capacity or resources to complete the process independently.
- *Pre-filling training strategy*: Requested by users, this strategy—including a user manual and online workshops—serves multiple purposes: clarifying doubts, assisting in the selection of ventures to participate in the process,

and strengthening capacity for future implementations (Doernberg et al. 2022; Páez Pareja 2023).

- **Network team input:** The network team plays a crucial role in the success of the entire process, particularly in the following aspects:
 - Initiating and leading the design process within a participatory co-creation framework.
 - Providing continuous support during implementation, including developing the training strategy and offering individualized follow-up for each initiative.
 - Reviewing user-provided information, a highly valued step that helped standardize criteria across the network.
 - Preparation of reports on an initiative basis and at the global network level.
- **Integration of the SAF into the institutional dynamics of local NGOs that accompany the process:** Ensuring long-term use of the SAF requires assigning responsibility for its implementation to a team rather than an individual, integrating it into the operational plans of the local NGO, and using it as a project monitoring tool. Support of these entities' leaders is key to ensuring successful integration.
- **Pre-existing trust relationships:** The established trust between local NGOs and SSEEIs, as well as between the network team and local members, is a decisive factor in encouraging participation and facilitating the adoption of the SAF.

In contexts where SSEEIs are supported not by local NGOs but by other types of local institutions, these insights remain applicable.

A further design insight relates to the balance between simplicity and precision. In line with Hilden and Rosenström (2008), the SAF prioritizes simplicity to ensure usability, transparency, and comparability over time. While this approach may reduce analytical depth in some categories—particularly the environmental dimension—it significantly increases user acceptance, facilitates implementation in low-capacity environments, and strengthens the long-term viability of the tool. In this sense, the SAF's simplicity contributes to the sustainability of the measurement process itself.

On another note, there is a risk that SAF users may perceive it as merely a checklist of indicators, without fully grasping its underlying logic or its role in assessing the implementation of sustainability principles. To mitigate this, it is essential to invest time at both the network and local levels to explain the SAF's dynamics and to share the generated reports. The radar report, which has been successfully used in other tools such as SAFA, IDEA, and MESMIS, plays a crucial role in fostering a more holistic understanding of the SAF, particularly in vulnerable contexts.

Moreover, it is important to acknowledge the influence of external factors on the implementation timeline. Challenges such as the limited availability of systematized information within SSEEIs, participants' work schedules, and unforeseen social or political events in each country can affect the process. While some of these obstacles can be mitigated through the continued use of the tool, others will inevitably shape the design and implementation dynamics.

5.2 | Results Generated and Subsequent Analysis

Regarding the second perspective (i.e., the results generated by the tool), two editions of the SAF have been completed to date: SASA23, based on 2022 data, and SASA24, based on 2023 data. SASA23 was implemented by 21 SSEEIs across 7 countries, with the support of 9 local NGOs, while SASA24 involved 34 SSEEIs in 8 countries, supported by 11 NGOs. Figure 3 presents the global SASA24 radar chart, which visualizes the average contribution of the SSEEIs accompanied by *Comparte* to the seven sustainability principles. By presenting full network-level radar profiles for each year, we privilege a comprehensive system-wide view of sustainability performance at each point in time.

Building on this system-wide view, Figure 4 provides a comparative analysis of the development of the sustainability principles across activity sectors (i.e., agriculture, manufacturing, livestock, and services). This sectoral perspective enables the identification of differentiated sustainability profiles and supports the design of benchmarking strategies among SSEEIs operating in different sectors, with the aim of fostering cross-sector learning and strengthening overall sustainability performance.

The sectoral comparison reveals both shared patterns and clear differences in the development of sustainability principles. Overall, *gender equity* and *diversity and traditional knowledge* emerge as the most consolidated principles across sectors, with particularly strong performance in manufacturing. By contrast, the *multi-stakeholder approach* records comparatively lower scores—especially in agriculture and livestock—indicating scope for strengthening external engagement and collaborative governance.

Distinct sectoral profiles further highlight these differences. Agriculture performs particularly well in *environmental care*, reflecting the central role of environmental practices in this sector. Livestock shows stronger results in *territorial scope*, *diversity*, and *traditional knowledge*, while manufacturing stands out in *decent work* and *gender equity*. Services, in contrast, exhibit a more even but generally moderate performance across principles, without pronounced strengths or weaknesses. Taken together, these patterns underscore the value of sector-based

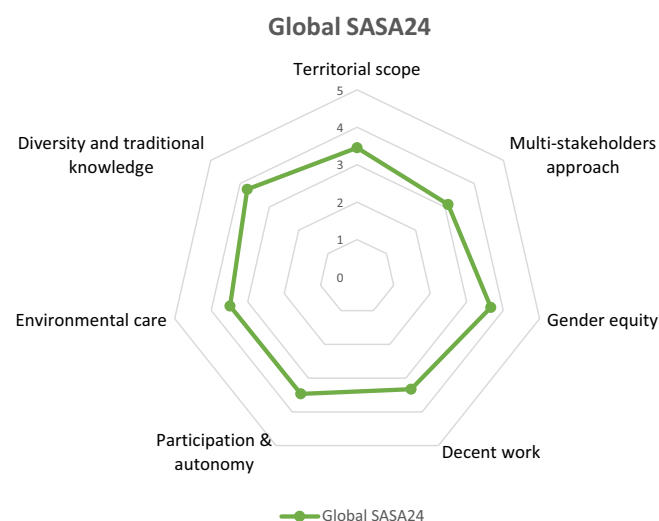
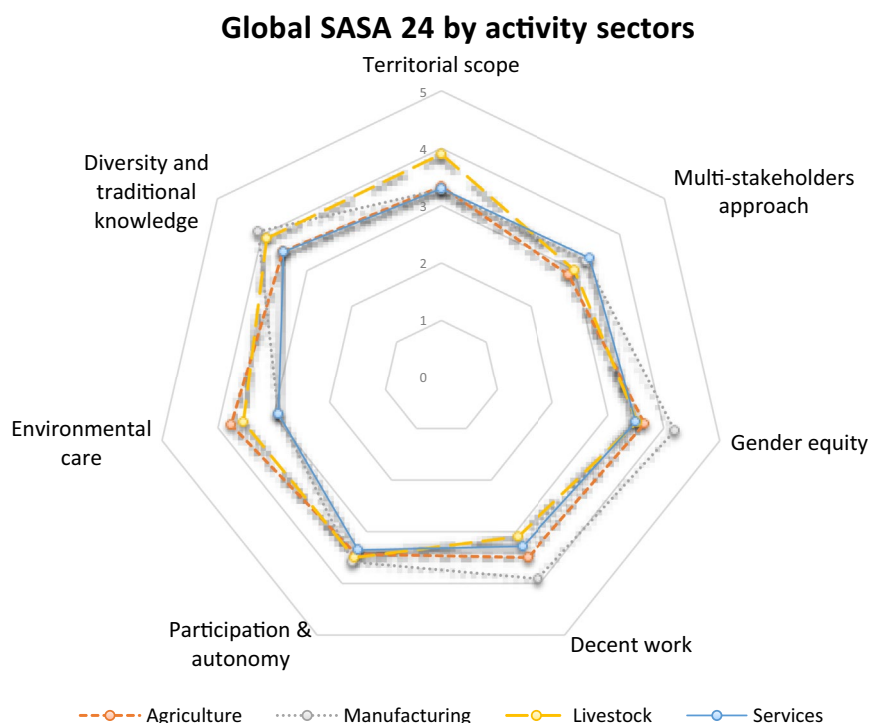


FIGURE 3 | Global Radar SASA24.



Sustainability principles	Global SASA24	Activity Sectors			
		Agriculture	Manufacturing	Livestock	Services
Territorial scope	3.45	3.33	3.28	3.90	3.30
Multi-stakeholders approach	3.10	2.86	3.25	2.99	3.33
Gender equity	3.66	3.65	4.20	3.53	3.50
Decent work	3.33	3.50	3.91	3.09	3.28
Participation & autonomy	3.47	3.44	3.58	3.50	3.35
Environmental care	3.48	3.77	2.92	3.54	2.92
Diversity and traditional knowledge	3.76	3.54	4.09	3.90	3.52

FIGURE 4 | Global Radar SASA24 by activity sector.

benchmarking to support cross-sector learning and to tailor sustainability improvement strategies to the specific strengths and challenges of each activity sector.

Finally, the SASA allows for longitudinal analysis, comparing the SSEEIs that have completed it for two consecutive years. Figure 5 shows the evolution from SASA23 to SASA24 in the 22 initiatives that have provided information for both years. The two snapshots capture the sustainability landscape of the network at distinct points in time, highlighting areas of consistency, emerging shifts, and principles where performance appears to strengthen or persistently lag. This longitudinal analysis offers meaningful insights into the evolving dynamics of the network and provides a useful baseline for interpreting future editions of the SASA.

Overall, the comparison between SASA23 and SASA24 reveals a pattern of gradual strengthening across most sustainability principles. The most notable improvements appear in *diversity and traditional knowledge* (+0.34), *environmental care* (+0.24), *multi-stakeholder approach* (+0.23), and *decent work* (+0.16). By contrast, *territorial scope* shows a very slight

decrease (3.44 → 3.41), the same as *participation and autonomy* (3.52 → 3.48). Therefore, the support strategies of the network and local organizations should focus on these aspects in order to enhance future performance.

Additionally, assessments at the question and indicator level facilitate the identification of the specific aspects that have advanced the most and those that remain less developed. These less-developed areas are particularly valuable for guiding the strategies of both the network and the local NGOs in tailoring their support to SSEEIs. However, the level of detail required to analyze question- and indicator-level results goes beyond the scope and space limitations of the present article.

While these granular insights are valuable for action-oriented decision-making, they also reveal certain limitations in data quality—stemming from the scarcity of systematized information and the limited educational levels of the participating teams. A shared understanding of indicators is crucial for improving data quality and ensuring comparability across assessments. Additionally, the diversity of contexts and sectors within the network adds to this

Global Radar Comparte SASA23-SASA24

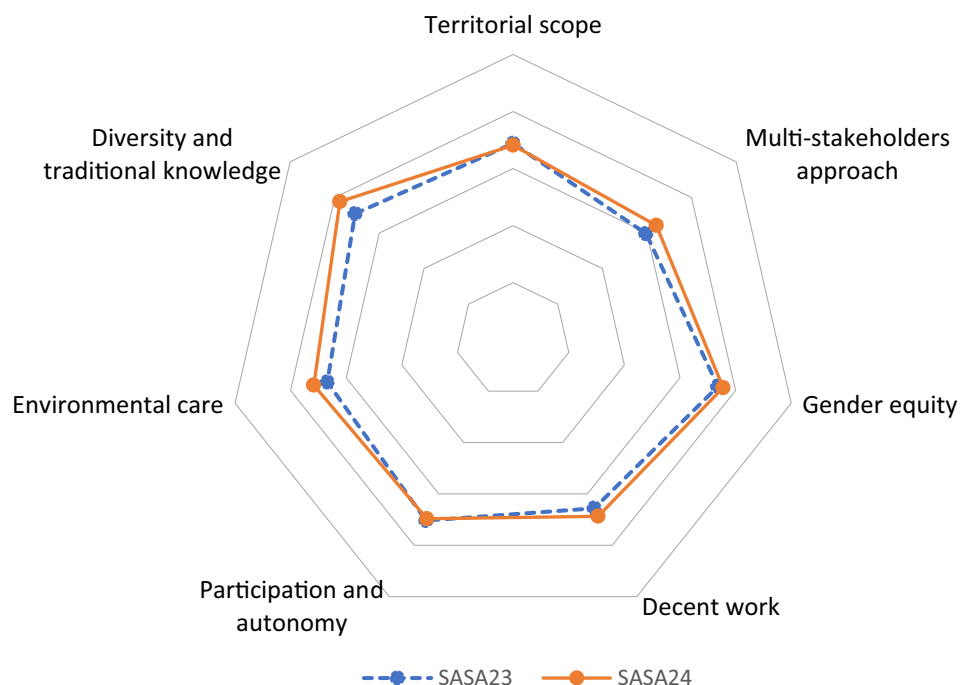


FIGURE 5 | Global Radar Comparte SASA23-SASA24.

complexity. To overcome these challenges, prior training and ongoing support throughout implementation are essential.

Despite these constraints, the application of the SAF within a network facilitates the sustainability of its use over successive years and enables both longitudinal and cross-sectional analyses. In the former, relative benchmarks allow each SSEEI to track its own performance over time; in the latter, sectoral averages across SSEEIs enable comparisons within and between activity sectors. This dual perspective enhances the tool's usefulness by supporting continuous learning while strengthening communication both within and beyond the network.

5.3 | Final Reflection: Distinctive Features of a SAF Designed for the SSE

Using a SAF in the context of the SSE entails several distinctive features that differentiate it from sustainability assessment tools designed for conventional enterprises.

First, sustainability within the SSE is not approached as a purely managerial or performance-oriented construct. Rather, it reflects a set of shared normative principles—relational, ethical, and community-based—that guide collective action (Sala et al. 2015; Villalba-Eguiluz et al. 2020). Consequently, a SAF for the SSE must translate values such as solidarity and equity into measurable yet meaningful categories without reducing them to conventional corporate metrics.

Second, SSE initiatives operating in highly vulnerable contexts face limited managerial capacities (e.g., Arboleda Álvarez and Zabala Salazar 2011; Díaz de León and Rivera 2019), scarce systematized data (e.g., Páez Pareja 2023), and complex social environments (CEPAL 2022; UNTFSSSE 2022). These conditions require a tool that prioritizes simplicity, collective learning, and accompaniment over technical precision. The tandem methodology, the pre-filling training strategy, and the emphasis on accessibility are therefore not merely operational choices, but structural responses deriving from the nature of the SSE in excluded contexts.

Third, unlike conventional enterprises, SSE initiatives pursue transformative effects that extend beyond organizational boundaries. Their sustainability involves contributions to the territory, community empowerment, food sovereignty, cultural revitalization, and multi-stakeholder collaboration (AECA 2015; Guridi et al. 2011). For this reason, the SAF must incorporate dimensions that traditional performance-based assessment systems often overlook, ensuring that community-level and relational outcomes are duly captured.

Finally, SAFs in excluded SSE contexts fulfil a dual role: they are assessment tools and also pedagogical and political instruments. Beyond measuring performance, they strengthen organizational identity, foster collective reflection, reinforce accountability, and contribute to shared understandings of sustainability. This dual evaluative–pedagogical function is a hallmark of assessment systems in such contexts and provides strong justification for the design choices adopted in this study.

6 | Conclusions

The research questions guiding this study focused on (i) how to design a SAF suited to the realities of SSEIs in excluded contexts, and (ii) how such a tool can demonstrate their contribution to sustainable development and improve their organizational management. The results of the design and implementation process provide clear answers to both questions.

SSEIs in excluded contexts face structural challenges—including scarce resources, weak monitoring practices, and low visibility—that constrain their capacity to manage effectively and demonstrate their contribution to sustainable development. To address these challenges, and following the DSR approach, we co-created an indicator-based SAF (Gasparatos and Scolobig 2012) within an international NGO network supporting collective SSEIs across multiple sectors. Grounded in the network's own sustainability principles—covering the economic, social, environmental, and governance dimensions—the SAF was developed through an iterative, multi-stakeholder process that ensured alignment with users' needs, capacities, and contextual realities.

The resulting framework directly responds to the challenges identified. First, it provides a low-cost, easy-to-use mechanism that allows SSEIs with limited managerial and financial resources to generate and organize key sustainability information, supported by local NGO partners but without reliance on external consultants or specialized evaluation teams. Second, it establishes a structured, periodic monitoring system that enables SSEIs and support NGOs to track progress, identify weaknesses, and compare results across time and sectors—thereby addressing the previous lack of reliable and systematic data. Third, by producing standardized radar reports and aggregated network-level analyses, the SAF enhances the visibility of SSEIs' contributions to sustainable development and strengthens their capacity to communicate outcomes to funders, public institutions, and other stakeholders. Together, these mechanisms mitigate structural constraints and reinforce the enabling role of support networks.

This work makes both academic and practical contributions. Academically, the design process was developed through a participatory approach with users that combined the top-down dimension-driven and top-down indicators-driven frameworks (Bonisoli et al. 2018). Additionally, the design method incorporated a question-answer approach, which enhances reflection and process understanding in groups with limited capacity for abstract thinking while facilitating the definition of more specific indicators for each category. Furthermore, the research identified key factors influencing the implementation of sustainability assessments within networks supporting SSEIs in excluded contexts, offering valuable insights into the contribution of SSE to sustainable development.

Moreover, it advances academic research in underexplored areas, such as: empirical research on the integration of discourse and practice in SSE (Jayawardhana et al. 2022; Marcis et al. 2019), the study of networks as actors for the dissemination of management practices (Appel 2016), and the understanding of the sustainability concept from the perspective of SSEIs in developing countries (Jayawardhana et al. 2022). At the geographical level, it also enriches research on international implementation of a SAF in the Latin America region (Schindler et al. 2015).

From a practical perspective, this research provides a SAF applicable to a diversity of industries in contexts characterized by scarce resources, limited management skills, and a lack of monitoring systems. In addition, it presents a design methodology that enables other actors to develop their own principle-based sustainability assessment tool.

This SAF addresses a critical information gap faced by networks and entities supporting SSEIs in excluded contexts. Through the systematic measurement and graphical visualization of contributions to the network's sustainability principles, it enables both intra- and inter-organizational evaluation processes. This evidence base not only informs more effective and context-specific support strategies but also enhances the social legitimacy of the SSE sector and the networks that sustain it. In doing so, the SAF provides a foundation that extends beyond the immediate network context, offering insights with broader applicability.

Building on this foundation, the findings of this research can be generalized to other networks, public institutions, and international cooperation agencies involved in the creation and consolidation of SSEIs in excluded contexts. Based on a definition of sustainability structured around seven specific principles, the designed SAF offers the necessary flexibility to be adapted to other Latin American contexts or tailored to more specific sectors of activity. Overall, the SAF constitutes a scalable, context-sensitive tool that strengthens organizational learning and the long-term sustainability of collectively organized enterprises in vulnerable settings.

7 | Limitations and Future Research

In concluding this paper, it is important to acknowledge certain limitations:

- **Limited measurement of environmental sustainability:** Due to the characteristics of the SAF, the profile of *Comparte* users, and the specific contexts in which SSEEIs operate, the environmental dimension of sustainability could not be assessed in depth. This constraint stems both from the scarcity of systematized environmental data and from the technical complexity required to evaluate environmental practices rigorously. As a result, only a basic set of environmental indicators could be included. This limitation opens a new direction for future research: designing a complementary, expert-led environmental assessment module to deepen the analysis of environmental performance. In this sense, the current SAF should be viewed as a foundational platform upon which more comprehensive environmental assessments can be built in future iterations.
- **Stakeholder inclusion:** The interests of certain stakeholders, such as funders and consumers, were not fully considered in the design process. It is essential to verify with these stakeholders whether the tool meets their information needs and to make adjustments as necessary
- **Lack of interaction analysis:** As with most sustainability assessment tools (de Ol et al. 2016; Wiget et al. 2020), the SAF does not analyze interactions between sustainability principles. This limits its capacity to provide a holistic evaluation of SSEEIs and to guide the definition of the most appropriate support strategies (Sala et al. 2015; Wiget et al. 2020).
- **Limitations arising from the quality of participation of the SSEEIs:** The promotion of channels and mechanisms for participation by the SSEEIs throughout the process does not guarantee genuine ownership of the tool. Existing relationships of dependency on local support organizations, together with limited analytical and interpretive capacities, may condition their level of participation and limit the SAF's potential to strengthen autonomy. These factors may also shape power dynamics within the NGO–SSEEI partnership. Future iterations of the SAF could explicitly address this issue by incorporating items that assess such dynamics from both sides of the partnership.

Addressing these limitations will allow for the further refinement of the SAF and improve its effectiveness, ensuring that it meets the needs of all stakeholders and supports the sustainable development of SSEEI in contexts of exclusion.

Future research could delve deeper into the longitudinal evolution of the SAF results and analyze the long-term effects of its application on the scalability and sustainability of SSEEIs. In addition, new possibilities for adapting this tool to different geographical regions and sectors could be explored.

Conflicts of Interest

The authors declare no conflicts of interest.

Endnotes

- ¹ Various entities: Universities, investors and funding organizations.

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Supporting Information

Additional supporting information can be found online in the Supporting Information section. **Data S1:** sd70652-sup-0001-Supinfo.docx.