Policy Brief
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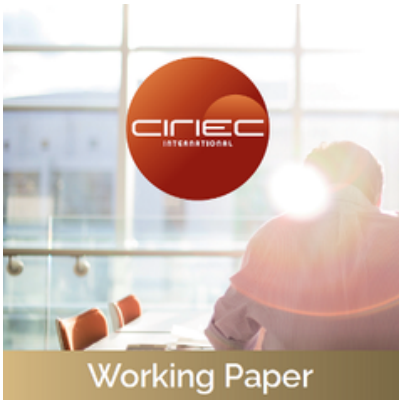
DIGITALISING THE SOCIAL AND SOLIDARITY ECONOMY:

MUTUALDATA AS A STRATEGIC TOOL FOR IMPACT MEASUREMENT AND TRANSPARENCY IN THE PORTUGUESE MUTUAL SECTOR

by Cátia Cohen, Rui Costa & Vanessa Palma

Highlights:

- Mutual associations play a central role in healthcare, complementary welfare and social services, yet remain largely statistically invisible.
- Fragmented and non-comparable data limit transparency, institutional recognition and evidence-based policymaking in the mutualist sector.
- MutualData provides a digital, standardised and participatory infrastructure to collect and analyse data on mutual associations.
- Preliminary results confirm both the feasibility of digital data collection and the relevance of the indicators defined.
- MutualData constitutes a replicable policy tool for strengthening governance, transparency and public policy dialogue in the Social and Solidarity Economy (SSE).



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WHY DATA MATTERS FOR THE SOCIAL AND SOLIDARITY ECONOMY

Over the last decade, the Social and Solidarity Economy has gained increasing recognition as a pillar of social cohesion, employment and sustainable development in Europe. Nevertheless, this recognition has not been accompanied by a comparable improvement in the availability of structured, comparable and up-to-date data.

In the mutualist sector, this gap is particularly evident. Mutual associations provide essential services—especially in healthcare and social protection—often in close partnership with the State. Yet, their contribution remains insufficiently documented, limiting public visibility, weakening institutional legitimacy and constraining their capacity to influence policy design.

Reliable data is therefore not merely a technical requirement: it is a **precondition for transparency, accountability and evidence-based public action.**

FROM FRAGMENTED INFORMATION TO A SHARED DATA INFRASTRUCTURE

In Portugal, the first systematic attempt to address this gap was the **Observatório Mutualista**, launched in 2016 by APM-RedeMut. While pioneering, this initiative was primarily descriptive and limited by manual data collection processes.

MutualData emerges as the next step in this trajectory. Developed by APM-RedeMut in partnership with the Nova SBE Data, Operations and Technology Knowledge Center, and integrated into the **Base de Dados Social** platform, MutualData represents a qualitative leap in the digitalisation and systematisation of data on mutual associations.

Rather than a standalone database, MutualData functions as a **sectoral data infrastructure**, combining standardised indicators, digital collection, data governance mechanisms and public dissemination of aggregated results.

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MutualData pursues five interrelated objectives:

1. **Centralise and standardise data** on Portuguese mutual associations, overcoming fragmentation.
2. **Strengthen organisational capacity** in information management and strategic use of data.
3. **Enhance transparency and accountability**, through dashboards, indicators and public reporting.
4. **Demonstrate economic and social impact**, covering healthcare, welfare, social services and employment.
5. **Support evidence-based policymaking**, at national and European levels.

In this sense, MutualData is not only a technical tool but a strategic instrument for sectoral modernisation.

A PARTICIPATORY AND INCREMENTAL METHODOLOGY

The development of MutualData followed a gradual and participatory approach, evolving from Excel-based questionnaires (2016) to structured interviews (2018), electronic forms (2023), and finally an integrated online questionnaire within Base de Dados Social (2025).

This evolution improved:

- data quality and comparability,
- auditability and traceability,
- interoperability and longitudinal analysis.

The questionnaire is modular and covers organisational characteristics, governance, healthcare activities, complementary welfare, social services, infrastructure, human resources and economic activities. Annual data collection cycles allow the construction of time series while avoiding excessive reporting burdens.

WHAT THE PRELIMINARY RESULTS SHOW

Although data collection is still ongoing, preliminary results already provide valuable insights:

- Mutual associations exhibit strong territorial proximity and diversified service provision.
- Healthcare remains the core activity, complemented by welfare schemes and social services.
- The sector employs a predominantly female workforce with medium to high qualification levels.
- Digital data collection is feasible, even in a heterogeneous and historically low-digitalised sector.
- Standardised indicators enable benchmarking and future longitudinal analysis.

These findings validate the conceptual and methodological design of MutualData, while highlighting the need for continued digital capacity-building.

POLICY IMPLICATIONS

For **mutual association leaders**, MutualData demonstrates that:

- data is a strategic asset for governance and sustainability;
- digitalisation can reinforce transparency without undermining autonomy.

For **public authorities**, it shows that:

- structured sectoral data improves policy design and evaluation;
- digital platforms can enhance oversight while reducing fragmentation.

At the European level, MutualData aligns with the Social Economy Action Plan and the Transition Pathway for the Proximity and Social Economy, offering a replicable good practice for other countries.

CONCLUSION

MutualData addresses a long-standing structural weakness of the mutualist sector: statistical invisibility. By institutionalising digital data collection and impact measurement, it strengthens transparency, accountability and institutional recognition.

Beyond Portugal, MutualData has the potential to become a **reference model for data-driven governance in the Social and Solidarity Economy**, supporting more informed public policies and contributing to a stronger European social model.

Cohen, C., Costa, R., & Palma, V. (2025). Digitalization of SSE: MutualData as an Innovative Tool for Impact Measurement and Transparency in the Portuguese Mutual Sector. CIRIEC Policy Brief 18 December 2025, Liège: CIRIEC International. https://www.ciriec.uliege.be/wp-content/uploads/2025/12/WP2025-06_online.pdf