

*Draft*

***Some Arguments for Co-operative Studies  
as an Interdisciplinary, International  
Field of Enquiry\****

by

Ian MacPherson  
Emeritus Professor of History  
Co-Director, the National Hub  
The Canadian Social Economy Research Partnerships  
University of Victoria  
Victoria, British Columbia, Canada

cluny1@uvic.ca

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### ***Co-operatives, Co-operative Movements, Co-operative Thought and the Academy***

The co-operative movement, co-operatives and the thought associated with them are, with very exceptions, ignored or patronized in the academy. For the most part, academics with an interest in co-operatives have difficulty establishing their careers, unless they are fortunate enough to be in one of the very few institutions with developed and supported, sustainable and focussed research institutes concerned with the study of co-operatives and co-operative thought. Even then, they have to struggle to gain acceptance from colleagues in the main streams of universities. Typically, they have to divide their time between the demanding pursuits of academic life and the often-complex way in which they have to engage co-operatives in carrying out their work. They will probably have considerable difficulty in establishing their careers in the intensely competitive environment of universities. There are very few universities with developed, supported, and sustainable research institutes focussed on the study of co-operatives and co-operative thought.

Curricula in virtually all post-secondary institutions around the world are generally silent on the co-operative movement (or even worse, misrepresent it). Serious consideration is isolated to a very few programmes involving only very limited numbers of researchers and teachers. The result is that only a miniscule percentage of university students can study the co-operative movement in a serious and sustained way.<sup>i</sup> The movement is generally ignored in the major disciplines within Social Sciences and the Humanities. It is usually absent from courses in Sociology, Anthropology, Economics,<sup>ii</sup> History, and Political Science or in regional studies programmes in Latin America, Asia, and Africa, even though one might expect it to be considered seriously in them, given the movement's past and present importance in those regions. It is poorly examined – if at all – in most law faculties, while business schools, almost without exception, pay scant attention to the co-operative model when teaching about business forms. Aspiring teachers do not consider how they might teach about the movement in their classes in education faculties, meaning that they are ill-prepared to overcome the typically low attention paid to them in the “authorized” secondary school curricula. Though they are taught subject content in many areas, or required to study it elsewhere, they do not learn about co-operatives as a form of business, as an avenue for youth entrepreneurship, and as manifestations of a significant body of social/economic thought.

This paper tries to make the case for why the development of Co-operative Studies as a joint community/academic pursuit should engage the interest of more researchers, teachers, and students in the academy. It should attract the support of more people involved in the movement. It argues that it should engage community and university partners in a creative, reciprocal, and genuinely respectful way. It argues that the field needs to define its own questions and think through systematically how research in Co-operative Studies can best be undertaken.

#### ***The Arguments from Size***

The co-operatives affiliated with the International Co-operative Alliance, the international co-operative movement's main international organisation, are owned by some 800,000,000 members.<sup>iii</sup> Many of those memberships are really family memberships used by several members of a family: for example, in patronizing a co-op store or co-operative financial institution in India, Finland or Australia. At the same time,

it is also true that many people belong to more than one co-operative. Thus it is impossible to be as precise as one might like to be in estimating how many individuals are actually involved in the international movement.<sup>iv</sup> It is certain, however, that the number of people around the world using the services of co-operatives and exercising membership rights of ownership and patronage is substantial.

There are other ways to think about the statistical importance of co-operatives. The annual sales of the 300 largest co-operatives in the world today are about the same as Canada's Gross Annual Product (GAP),<sup>v</sup> the tenth largest in the world.<sup>vi</sup> Internationally, the movement employs 20% more people than do the much more publicized multi-national firms.<sup>vii</sup>

Moreover, the movement exists to varying degrees in every country around the globe serving over 300 purposes for groups of people and their communities, from production through processing to consumption, from banking to travel, from housing to transportation, from creating employment to providing health services...meeting needs literally from birth to death.<sup>viii</sup> The United Nations, appreciating the size of the "family memberships" particularly in agricultural, consumer, and financial co-operatives, estimates that co-ops meet significant needs for three billion people, or roughly half of the world's population.<sup>ix</sup>

### ***The Arguments from European History***

Depending upon where one wants to locate its beginnings, the movement's history stretches back at least some 160 years; some would push it back even further by another 100, 500, or even more years.<sup>x</sup> If one accepts even the shortest time frame – 160 years – as the span of the movement's life, it is not difficult to understand, as the following pages suggest, how it has been entwined with many of the major economic and social changes in that time span. It is arguably the world's largest social movement and an unusual one in the way in which it tries to integrate economic need with social responsibility and institutional accountability. By any measure, I submit, the movement is an important economic and social force.

The co-operative movement did not develop in isolation. It was intertwined with many key intellectual debates, some interesting research activities, and developing educational traditions for much of the nineteenth and the first half of the twentieth centuries. This can be seen by briefly surveying the histories of the most influential European movements, countries where the "organized" movement (consisting of legally incorporated co-ops) first appeared. It suggests some of the underlying reasons for their development as a way of indicating their complexities. It dwells briefly on some of their connections with research, education, and teaching to suggest that they are natural associations that should be encouraged and developed. .

In the United Kingdom Robert Owen and the Owenites played a major role in the emergence of co-operatives in the early nineteenth century. They have been credited (in the United Kingdom at least) with coining the term "social science", a form of enquiry they thought would greatly inform how ordinary people could better understand the world around them and develop institutions like trades unions and co-operatives to better their situations.<sup>xi</sup> It was a perspective that helped shape the emergence of social scientific enquiry in the United Kingdom and many other parts of the world throughout the nineteenth century. Owen's emphasis on early childhood and life long education also

significantly influenced educational theory generally and the co-operative movement specifically well into the twentieth century.<sup>xiii</sup> From the beginning that movement (thanks partly to his influence) was committed to the broad education of its members, particularly in the first century after their generally accepted beginnings in the 1840s. They operated lending libraries, ran special classes on a great variety of topics, pioneered in adult education (notably in the development of what might be called the seminar method), prepared an amazing array of educational materials, and contributed to the development of the Workers' Educational Association. Several important thinkers, including Beatrice and Sydney Webb, George Holyoake, G.D.H. Cole, A.M. Car-Saunders, C.R. Fay, and T.W. Mercer, were attracted to the movement and made immense contributions to its development.

These educational and research conditions have been carried on through the efforts of the Co-operative College, which was established in 1920. It became a major international centre for co-operative learning and publications, print and film, in the inter-war years and in the period immediately after World War Two, though its influence arguably waned afterward. It is currently enjoying a renaissance as it embraces new technologies and reaches out around the world. In recent years, too, a band of researchers in universities have united with representatives from the co-operative world to form the UK Society for Co-operative Studies. They have produced important studies into mutual and co-operative enterprise, widening the contemporary discussion by reaching back to the movement's roots and outward to researchers elsewhere in Europe. For all their successes, however, the main stream educational systems in the UK are still deficient in teaching about the movement and the movement has less impact than its size, history, and promise deserves.

In France, the emergence of the co-operative movement in the early nineteenth century was also associated with new ways of thinking about the major changes of the times, beginning with the work of Charles Fourier and Henri Saint-Simon. Fourier's critique of existing society and his search for alternative social forms stimulated the development of a long series of intentional communities in Europe and especially North America.<sup>xiii</sup> Saint-Simon studied social organisations "scientifically", searching for ways to overcome what he perceived as an ethical crisis in European society.<sup>xiv</sup> He sought to develop institutions that would have the moral basis to cope with the evils of industrialism as he saw them, as well as to provide ethical guidelines for many losing their moral compass in an increasingly secular world. Like his one-time mentor, Auguste Comte (with whom he could also make a claim to be the founder of "social science" – claims more likely accepted in France), Saint-Simon profoundly influenced French co-operativism throughout much of the nineteenth and early twentieth centuries. They especially influenced *associationisme*, a powerful intellectual current within French socialism and political life generally.

The French co-operative tradition, supported by national worker and consumer movements, was rich in theory and reflection, and it was at the cutting edge of many theoretical debates, both within and without the movement.<sup>xv</sup> One of its intellectuals, Charles Gide, was arguably the most important co-operative theorist of the first fifty years of the twentieth century and a significant contributor to economic and social thought generally. The School of Nîmes, with which he was prominently associated,

became one of the most important centres for co-operative thought and theoretical investigation.

Following World War Two, intellectuals and activists associated with the French movement were arguably the main leaders in the development of the Social Economy tradition. It sought – and seeks – to establish commonalities in structure, purpose, values, and policy requirements among organisations with strong social purpose and ownership not based on investments: i.e., co-operative, mutuals, associations and some kinds of public institutions. It advocates a more complex understanding of the nature of an effectively functioning economy from the dominant view, which assumes that the investor-led market place will ultimately respond effectively and fairly to all social and economic needs. It is a rich context within which to understand the uniqueness of co-operative enterprise and to reflect on the essential elements of co-operative thought, a counterpoise to the common tendency to compare co-operatives with competitors from the private sector.

The German, Italian, and Nordic traditions were also important in developing the mainstream of co-operative thought and activism from the later nineteenth onward.<sup>xvi</sup> In Germany, the movement emerged in rural areas as a consequence of failed harvests in 1846-1847. In 1847, Friedrich Wilhelm Raiffeisen organized the first aid association in Weyerbusch (Westerwald) to help poverty-stricken rural people; some seventeen years later, he created the “Heddesdorfer Darlehnskassenverein” (Heddesdorf Loan Society), which is usually thought of as the first co-operative in the Raiffeisen tradition. The Raiffeisen financial system that emerged supported a wide range of local farming co-operatives to help boost rural prosperity and stability, therefore reflecting many of the intellectual and cultural understandings of rural life as well as the economic pressures transforming them. Raiffeisen also provided a strongly ethical perspective to his co-operative efforts because of his personal deeply-held religious views and his almost mystical confidence in groups working together for the common good.

The movement started in the German towns and cities at about the same time, stirred on by a deepening Depression that began in the later 1840s. Its chief protagonist was Hermann Schulze-Delitzsch, who started another financial co-operative movement concerned primarily with meeting the needs of financially struggling artisans and small business people. Basing his organisations on principles of self-help, self-administration, and self-responsibility (the same principles that typified the Raiffeisen co-operatives), he founded the first “raw materials association” for carpenters and shoemakers in 1847, followed by the first “thrift and loan association” – the forerunner of today’s Volksbank – in 1850. In contrast to the moral conservatism that tended to typify the Raiffeisen approach, the Schulze-Delitzsch organisations were more “liberal” and individualistic, more preoccupied with personal economic advancement than with community engagement. They were also very effective at policing themselves and, through the efforts of Schulze-Delitzsch, in securing admirable legislative and regulatory frameworks for their development – and indirectly for much of the German movement as well.

The German financial co-operative movement, though somewhat divided by these differing traditions, nevertheless grew steadily, especially after legislation passed in 1889 provided basic regulations governing membership, accounting practices, federation governance, and leader accountability. As the century came to an end, too, the consumer movement also took root, largely developed within and by the German working classes in

industrializing area; it formed a wholesale in 1889 and a national organisation in 1903. Many consumer co-operatives were also associated with left-wing political movements, associations that created complexities whenever Germany nationally or on the state level elected right-wing governments. In the 1890s, residents in larger German cities started to organize housing co-operatives in significant numbers; it too quickly became an important part of the German movement.

In total, Germany possessed a vibrant, distinctive movement by the early twentieth century, much of it surviving the dislocations of the Great War of 1914-1918. With its strong intellectual currents emanating from the work of Raiffeisen and Schulze-Delitzsch, the growing support of the working and agrarian classes, its essential pragmatism, and its fundamentally strong legislative frameworks, the German movement became one of the most important forces within co-operative circles.

Following the Second World War, the German movement became involved with one of the world's strongest and most persistent efforts to create academic analyses of the movement. It established centres at ten universities, most of them essentially reflective of the German experience, though the centre at Marburg, under the leadership of Hans Muenkner until his retirement, became particularly well known for its work in southern countries; its graduates are easily found in co-operatives and government departments concerned with co-operatives throughout much of Africa and Asia. The German institutes, however, until recently, have focussed largely on financial and rural co-operatives, in the process helping to create a specialty in co-operative science. Courses were developed, especially in law and economics faculties, and considerable valuable research has been undertaken to analyze the economic effectiveness of co-operative organisations. It is a body of work that is unfortunately little understood or considered outside of Germanic parts of the world.

The roots of the Italian movement go back to approximately the same period in European history. Emerging largely in northern Italy amid growing industrialism and Italian nationalism, the movement was remarkable for its capacity to grow in a number of sectors – financial, worker, consumer, and “social”. The traditional beginnings of the Italian movement lie with the creation of a consumer co-operative in Torino in 1854 and a worker co-op in Savona shortly afterward. In the 1880s farmers influenced by Leone Wollemborg and urban workers led by Luigi Luzzatti started the financial co-operative movement. In the same decade farmer's co-operatives began to appear.

As is the case with all national movements, the Italian movement was rooted deeply in the national experience, institutions, and social systems. As formal co-operative organisations began to emerge at the turn of the twentieth century, they therefore reflected the strong sentiments of Italian nationalism of the period. While borrowing ideas from other lands, Italian co-operators were noted from the beginning for their willingness to experiment with new forms to meet the varied and pressing needs of their communities. They brought their own ideological and religious conceptualisations to the possibilities co-operative enterprise afforded.

Many Italian socialists embraced co-operatives as a key element in their programmes, and co-operatives were important for their first national organisations when they started to appear in the 1890s. Later, in the first half of the twentieth century, the socialist perspective was reconfigured by the moderate and powerful writings of Antonio

Gramsci. In the same time frame, though, many Roman Catholics, encouraged by the papal encyclical *Rerum Novarum*, released by Pope Leo XII in 1891, responded to deepening economic and social issues, and embraced a wide range of co-operative activity. They ended up supporting many of the same kinds of co-operative endeavours as their left-wing contemporaries, despite the differences in motivation. These two broad divisions, plus equally deep divisions within the Italian Left traditions after World War Two, provide ample ground for fascinating research and intellectual controversy; they also led to widespread experimentation with the co-operative model. The Italian movement also provides some of the most fruitful contexts within which to consider the complex relationships between co-operatives and the state. It has always worked effectively with municipal governments, whether Communist or Catholic, and with national political parties. It has developed innovative ways to fund co-operative enterprise and it has helped create effective legislation frameworks for co-operative development, starting as early as the first decades of the twentieth century. The Italian approach prospered as the twentieth century wore on, providing one of the most important models for flexible and innovative co-operative development, especially in the field of social co-operatives.

Research into, and education about, the Italian movement has been pursued vigorously at both the University of Trento and the University of Bologna. These universities, well supported by Italian co-operative organisations, are important centres for the development of new co-op approaches. Under the current leadership of Professors Carlo Borzaga and Stephano Zemagni respectively, they have played a major role in leading what is one of the most challenging issues for co-operatives (and other Social Economy organisations); how to make a place within contemporary economic theory for the legitimacy and continuing effectiveness (beyond market failures) of organisations based on democratic ownership, distribution of surpluses on participation or need, and significant reliance on volunteers. Their work, through games and firm theory, addresses the perspective – often found in the non-cooperative world and sometimes within it – that successful co-operatives will convert to investor-owned firms because of their alleged greater efficiency. They argue for a more sustainable basis for co-operative endeavour through a fuller appreciation of the importance of reciprocity and by a deeper appreciation of the ways in which some kinds of firms (like co-operatives) contribute to community sustainability, family survival, and legitimize pluralistic motivations, contributions that can be highly “valued”. It is a perspective of profound importance for the development of government policies for co-operatives and other social economy organisations.<sup>xvii</sup>

The Nordic movements were also very prominent in the development of the European co-operative movement. They too began to emerge in the later nineteenth century. In the countryside, as in many other countries in the North Atlantic world, farm people developed a range of financial, marketing, and supply purchasing co-ops to enter into market economies and strengthen rural communities for a variety of commodities including forest products. At about the same time, consumer, housing, and service co-operatives emerged, many of them derived from the communitarian traditions of Nordic societies.

Contrary to what is commonly assumed, the Swedish movement, especially the consumer movement, had its roots in the growth of liberal not socialist groups, among

people wishing to attack the Social Question (how, amid so much prosperity is poverty possible?). It spread through worker societies and educational movements during the later nineteenth century but was firmly opposed by more radical leader following the Marxist tradition of belittling co-operation as a form of false consciousness, a diversion from the essence of the class struggle. This started to change in the twentieth century and Social Democrats started to support the movement, in the process helping to build a strong network of consumer societies that developed, in imitation of the British model, strong central organisations, notably a wholesale and an insurance company. Borrowing from German as well as British co-operators, the Swedish movement also became known for its architecture, consumer education, and innovative styles. It contributed to the development of a strong housing movement and, after World War Two, became significantly engaged in the development of co-operatives overseas, particularly in Africa.<sup>xviii</sup> The Swedish consumer movement is a very interesting movement, one that presents important insights into Swedish history, not least for the issues it has been facing in recent years as increasingly urban societies, as elsewhere, are less attracted to the communitarianism of the movement and perhaps because the movement did not pay sufficient attention to the importance of membership. It is a movement that has wrestled with the great challenges of finding the best relationships between local, regional, and national associations and with a growing, increasingly effective set of competitors. It is a movement that demonstrates many of the most important and complex issues co-operatives everywhere face in the emergence of “modern” society.<sup>xix</sup>

The Swedish agricultural movement flourished before World War One notably in dairying and slaughterhouses. Following adversities during the recession after the War, it revived during the 1920s only to be adversely affected again by the Depression of the 1930s. Following World War Two, the movement, closely associated with the Swedish Farmers’ Union, expanded to include virtually all the farmers in the country. It was organized in a maze of co-operative institutions reflecting geographic and commodity associations; it undertook a variety of cultural and social activities, and lobbied governments in the interest of the farm community. It became a major economic force in the country, not only for the marketing of farm produce but also for the harvesting of forests, the development of banking organisations to serve rural people, the creation of research and advisory services, and the training of co-operative personnel. It is an important case study in how co-operatives can be important organizers of the countryside. It is also important for understanding issues of increased competition, changing government policies, growing needs for more capital, and vertical and horizontal integration common in rural enterprise over the last fifty years.<sup>xx</sup>

The Finnish movement also demonstrates many of the main trends in that nation’s history. Like other Nordic movements, it has had a long association with other people’s movements, farmer, worker, feminist, and educational. Its rural co-operatives were patterned originally after Danish and German precedents in the later nineteenth century; its consumer co-ops borrowed heavily from Central European and British models, some of the strength it achieved being associated with Finnish determination to build effective organisations able to resist domination by Russian/Soviet aggressiveness. The consumer movement was divided between left wing and middle class supporters, institutionalized until recent years respectively in the E-co-operatives and the S-co-operatives. The split began amid the Russian 1917 Revolution and was not bridged until they were brought

together in a series of mergers in the 1990s. The Finnish consumer movement reflects much about Finnish history: how the country was modernized, the tensions created by the difficult history with Russia/The Soviet Union, the ways it became industrialized, the growth of modern business firms, the impact of rapid urbanisation, questions about co-operative identity, and the effectiveness of recent efforts at diversification. It is a movement going through a profound readjustment as it distances itself somewhat from its populist roots and seeks a new identity within the marketplace. It is a microcosm of many of the pressures co-operatives feel in the contemporary world.<sup>xxi</sup>

The Norwegian movement, though less active in international circles, possesses an equally strong and powerful movement whose history and current development reflect much of that country's experiences and adjustments to contemporary changes. It possesses very strong forestry and fishing movements, reflecting the importance of those industries in the national life and the determination of Norwegians to control their development. Its consumer movement parallels those of the other Nordic countries in the kind of early growth it experienced and the challenges it faced in the twentieth century. Its housing movement, since its beginnings in 1946, has become one of the most interesting in Europe. In many ways the Norwegian movement is an example of a national movement about which the outside world should know more: like many other movements around the world, it is a quiet success story that needs to be studied more and explained better.

All of these examples, drawn from the mainstream European movements, suggest aspects of the complex backgrounds and relationships that are commonplace within the international movement. In each case, the movements drew heavily from national experience and they show how diverse the movement can be...and how central many of their roots really are. One could easily examine other European movements to make the same point. The established movements in Central and Eastern also date back to the later nineteenth and twentieth centuries. While they borrowed much from western and northern Europe, they were also outgrowths of specific needs within the Austrian and Russian empires, particularly in rural areas. They were often agents of culture – Ukrainian, Russian, Polish, Austrian, Bulgarian – indeed, most of the major ethnic and cultural entities of that remarkably diverse region. Their history was much buffeted by the rise of Marxism and then Nazism, particularly the former. They are particularly interesting movements for students of Co-operative Studies, experiences that are not well known outside and, even within; they deserve considerable investigation and reflection. Their current revitalisation, particularly in health, social, and worker co-ops, as well as the growing interest in some academic circles suggest how deeply embedded co-operatives and community-based approaches are among the peoples in that region.

Farther south, the co-operative movements in Greece, Spain, and Portugal offer yet other ranges of experiences and underlying perspectives as well as different kinds of development. There, as in France, the movement tended to be grouped together with other kinds of organisations with social purposes: charitable institutions, religious groups, associations, trade unions, and government organisations to form the Social Economy, a concept that has enjoyed considerable growth in recent years. These associations invariably raise issues of identity but they also provide ways to compare and contrast how co-operatives function and what they do, a counterpoise to the more common comparison with private enterprise organisations. The field of Co-operative Studies quickly becomes

complex – and rewarding – even within the relatively limited framework of Europe; it becomes even more interesting when one struggles to place it within a genuinely global perspective.

### ***Arguments for Developing International Perspectives***

One of the most obvious dimensions of the field of Co-operative Studies is that it possesses, however muted or restrained it might sometimes appear to be, a commitment to international perspectives. These perspectives can readily be found throughout the movement's history. Arguably, they can be traced back to the movement's Enlightenment roots. One of the common preoccupations of eighteenth century Europe was the growing knowledge about "new" lands and territories, knowledge brought about by expanded travel, growing international trade, and increased knowledge dissemination through books, encyclopaedia, journals, public lectures, and coffee house discussions. The fascination for other parts of the world, Asia, Africa, and the Americas, is evident in the architecture and the literature of the period: from friezes on buildings to Daniel Defoe, from Voltaire to costumes and new foods, from searches for the "Splendid Savage" to changing modes of pottery and adornments. Robert Owen was in that tradition when headorned the walls of his Hall of Education in New Lanark with pictures of animals from other lands, the better to widen the purview of the community's children – and their parents.

The co-operative movement inherited this kind of international comprehension and it can still be found today – perhaps even more than at any other time. On one level, it can be seen as simply the outgrowth of natural curiosity. One of the pleasures a student of the movement or a co-operative enthusiast can readily have is to explore the great diversity of formal and informal co-operatives to be found virtually everywhere in the world. Doing so usually and quickly provides insights into societies that are not easily grasped by outsiders. The range of co-operative enterprise is genuinely startling: co-operative approaches have been adapted to serve almost every economic and social purpose one can imagine around the world. They reflect fascinating cultural variables, thereby inevitably raising a fundamental though rarely well answered set of questions for Co-operative Studies. Why is it that one society or one community tends to emphasize, and be more successful at, one or a few kinds of co-operatives while other communities focus on other kinds? What mixtures of economic and social needs best explain their predilection? What cultural contexts make co-operative development easier? more difficult? And, even when two communities or societies emphasize the same co-operatives, do they do so for the same reasons? Do they have they same kinds of expectations? Have they developed in the same way? Are they managed differently? Put another way, is effective management essentially the same the world over? Does it vary with different kinds of co-ops? within different cultures?

There are no simple answers to such questions and one of the limitations of much research in the field is a ready acceptance of glib answers to them – or, more commonly, a total ignoring of them. Instead, too many co-operative leaders, too many researchers, have a tendency to underestimate difference, to assume easy transfer from one movement or organisation to another, from one culture to another. One of the challenges for Co-operative Studies is to explore these contextual differences much more intensively than has been done in the past, in the process providing insights into host societies and

developing a better appreciation of the complexities and possibilities of international co-operative enterprise.

From its earliest days, the organized co-operative movement has repeatedly demonstrated its international ambitions. All of the major kinds of co-operative movements – consumer, worker, financial, and agricultural – leapt national boundaries as soon as they achieved any noteworthy successes. Their earliest leaders shared, albeit in not very systematic or integrated ways, the international perspectives of other ideological leaders of the nineteenth century: for example, Marx, Mill, Bakunin, and Kropotkin. Like them, they sought universal truths and, in many instances, envisioned international movements, most readily, in subsequent years, through the International Co-operative Alliance, but also through the International Labour Organisation, the League of Nations, and the United Nations.

For that reason, as well as interests in status and travel – and natural curiosity – co-operative leaders and organisations have almost invariably been willing to assist people around the world create co-operatives like the ones they had formed; often, notably in agricultural co-ops, they helped institutions that could and did become competitors. A long history of international associations has consequently developed. From the late nineteenth century onward, for example, British consumer co-operators have followed reports of new co-ops in other lands, especially in the Empire/Commonwealth and through the pages of *The Co-operative News*. An international network of co-operative banking enthusiasts, including Henry J. Woolf, Luigi Luzzatti, Alphonse Desjardins, and many more, shared information on the various forms of co-operative credit, and the result was the eventual emergence of the international co-operative movement adapted to different situations around the world.<sup>xxiii</sup> Some trades unions and political parties encouraged the development of co-operatives of various kinds, but particularly consumer and worker co-operatives, among working classes. The agrarian press, remarkably widespread, “aware”, and well-connected by the early twentieth century, featured articles by proponents of agricultural co-operatives as ways to improve the quality of agricultural production and to increase income to farmers and their communities.

One of the challenges for Co-operative Studies is to better understand the nature of these international dimensions, thereby helping to understand how ideas are distributed, how they are adapted to cultures, how they practice “democracy”, and how leadership emerges. All of the various kinds of co-operatives have certainly had leaders who gained international reputations but, for the most part, they were primarily local or, at most, regional or national in their impact. Typically, they have been notable for reflecting the grass-roots dimensions of their organisations and movements. At first glance, they might be best understood in the academic sense through the lenses of “folk wisdom” and popular culture as explored by anthropologists, cultural historians, and intellectual historians. It might be thought that some philosophers could find in the intellectual traditions of the co-operative movement more than they might at first assume. Most likely, they need – and deserve – to be considered on their own terms and not essentially in comparison with others.

In any event, the intellectual traditions of the co-operative movement, especially their international dimensions currently represent one of the least developed aspects of Co-operative Studies. The attempts to put a gloss of consistency over the diversity of the

international movement by appealing to the Rochdale tradition has achieved only limited success. Though the Rochdale emphasis on specific aspects of co-operative practice is an important dimension of co-operative thought, it is hardly a sufficient explanation for the growth of the international movement. Those who have undertaken research into the development of co-operatives have not done what they should have done to explore and think about the movement's intellectual roots and unfolding issues over time, particularly in dramatically different places.

### ***Some Issues Associated with the Internationalisation of the Movement***

Co-operatives, however, cannot be separated from the history of which they are a part, though sometimes studies of them – historical or otherwise – tend to do so. They have been, for example, important dimensions in the rise of empires, creating issues that are sometimes unpleasant for co-operative enthusiasts to deal with, given their typical commitment to self- and group-directed human development, concepts central to co-operative ideology. It is, therefore, not easy to acknowledge the roles co-ops played in building empires or to accept the racist attitudes that sometimes characterized their operations.

Imperial powers organized co-operatives primarily to expand marketable agricultural production or to mobilize the savings necessary for the development of market-based economies. Each northern empire had its own approaches to the development of co-ops, leading to variations in the kinds of roles they asked public servants to play and in how they distributed regulatory authority between imperial, colonial, and local administrators.<sup>xxiii</sup> The variations in the British, French, German, Dutch, and American systems were significant and affected how movements developed before and even after their colonies achieved independence. There were also significant differences in the roles played by non-government enthusiasts, people from significant co-operative backgrounds in Europe or North America, religious leaders, and indigenous peoples who learned about co-operatives, typically when they were students in the “mother countries”.

As one explores the emergence of formal or legally registered co-operatives within European and North American imperial history, one can quickly see the need to think again about how we understand the movement's origins and common boundaries. In much of the literature, credit for establishing co-operatives in the Southern hemisphere tends to go to advocates from Europe and North America, people within governments, co-operative institutions, churches, and development agencies. In one sense this is reasonable if the people being considered possessed influence and were charged with fostering co-operative development within legal frameworks adapted from European or American experiences. They could indeed play significant roles in determining how co-operatives should be organized, regulated, and encouraged. They affected how co-operatives developed within imperial regimes, and their impact often continued long after the imperial ties were gradually reduced.

Rarely, though, is the emphasis on “outsiders” a sufficient explanation for co-operative development. Many successful co-operatives in the imperial period relied heavily upon traditional notions of collaboration, kinship, and mutuality associated with the myriad kinds of Indigenous societies around the world. Traditional notions, which often had helped shape trade relations existing before the advent of North Atlantic

political, military, social, and economic dominance, contributed significantly if silently to the successes that were achieved...and even to effective continuation after imperial control ended. One might hypothesize that co-operatives flourished among colonized peoples only when they were built on such traditions and were at least partly absorbed within existing customs and relationships. They typically explain the success and continuation of many of the “old order” co-ops, many of which still survive, even a half century or more after the empires have formally gone in Asia and Africa; the only difference in that now they are being managed by people from those countries and not by people from the imperial homeland.

The imperial record in developing co-operatives is mixed, and simple generalisations must be avoided: much research needs to be done. Understanding such contextual origins as the foregoing suggests, raises questions not readily considered in the North Atlantic contexts (but should be): what are the relationships between spontaneous co-operation (what human beings automatically do), traditional co-operation (what they inherit from their cultures and kin associations), and what they are required to do by governments (forced or encouraged co-operation).<sup>xxiv</sup> How do these forms of co-operative behaviour affect the development of co-operatives? How do they determine what is instinctively understood and implemented? What could researchers into the experience of formal co-operative development learn from Anthropology, Social Psychology, Metahistory, and Sociology, the disciplinary perspectives that might best inform such analyses? What could we conclude about the various ways in which human beings learn about – and practice – co-operative behaviour? It is a fascinating, though virtually unexplored, field of enquiry for people interested in Co-operative Studies.

The co-operative experience in formerly colonized societies must also be balanced by the recognition that there have been at least two other waves of co-operative endeavour over the last seventy years. Almost all of the Independence movements that emerged after World War Two, particularly those in the 1960s and 1970s, possessed significant commitments to the development of co-operatives; one might even say they typically possessed unrealistic expectations of what co-operatives could accomplish in the short term. Independence leaders like Nehru, Gandhi, Sukarno, Nyerere, Nkrumah, and Williams generally helped “old order” co-ops from the colonial period adjust to the political and economic changes after independence; many of them were important for sustaining economic vitality, providing alternative ways for local leaderships to develop, and, in some instances, for providing places for the abuse of patronage appointments.<sup>xxv</sup>

More importantly, almost all of the independence leaders advocated the formation of many new kinds of co-ops, although there were marked differences in the types of co-ops they supported, the degree of state involvement they provided, and the consistency with which they carried out their stated aims. The difference in emphasis and in promotion should be a very interesting avenue for future research, one that would generate considerable knowledge about how to promote co-operative development even today.

A similar pattern can be found in Central and South America, where many governments from 1950 to 1980 – as well as their opposition movements – promoted co-operatives as a way to build local communities and to resist domination by privileged classes and outside interests. The history of co-operatives in Brazil and its Spanish-speaking neighbours, therefore, is particularly interesting and complicated. Central

America, Colombia, and Perù witnessed vicious struggles between left and right wing groups that advocated co-operatives, struggles that still shape co-operative development in the those countries in the twenty-first century. The ways in which co-operatives emerge out of local traditions – Indigenous and Eurocentric – is particularly fascinating and worthy of much greater attention – in many languages and from different cultural perspectives.

In more recent years, as in the global North, many people in the South have established a remarkable range of new co-operatives, part of the second great wave of post-imperial co-operative enthusiasm. Generally, these are small-scale co-operatives aimed at creating work, building financial resources, providing housing, and meeting health needs. In Latin America, notably in Central America, Argentina, Brazil, Colombia, and Perù, there is considerable co-operative revival. Some of the new developments take the form of “Phoenix co-ops”, worker co-ops developed by workers taking over failing firms. Others include co-ops developed among those who make a living from scavenging reusable goods from the garbage of the major cities; among new people wishing to engage in the burgeoning international Fair Trade movement or new tourism co-ops (often featuring eco-tourism); among young people creating jobs for themselves in high tech industries or agricultural production; and communities developing new sea food organisations and housing co-ops. They include the expansion of health co-operatives, a form of co-operative enterprise in which South America has a remarkable record. This renewed – and new – vigour is part of a worldwide phenomenon, a new wave of co-operative enterprise responding to what is commonly called globalisation.

Another important dimension in the internationalisation process was the way in which European immigration affected co-operative development. The kinds of international networks and communications developed within the emerging international movement during the late nineteenth and early twentieth centuries were remarkable, and they were reinforced by the bonds of empire and by the exportation of co-operatives ideas and strategies within the cultural baggage of immigrants in “new” lands. Many co-operatives were established by European settlers, what one might call “planter co-operatives”. They were very common, especially if one recognizes that a continuum of formal and informal co-operative strategies was commonplace during the settlement process – from building bees to the development of community-based educational activities to the purchase of consumer goods to shared harvesting techniques to collaboration in the sale of produce – indeed, for many they were necessary strategies for survival. “Planter” co-operatives played important roles in the “settlement of countries as diverse as Kenya, South Africa, Indonesia, Australia, Argentina, Brazil, Canada, and the United States; many of them – or the descendants of them – can still be found, notably in the agricultural and co-operative banking sectors.

That does not mean that co-operatives of given types were the same on all parts of the settlement frontier: financial co-operatives as organized by German settlers in Argentina in the 1880s, for example, were not the same as financial co-operatives created by farmers in the Canadian west fifty years later; nor were the agricultural marketing co-operatives both groups developed. In fact, the roles of co-operatives in settlement, from the agrarian movements of the later nineteenth century to the Kibbutz movement of the twentieth century, form yet another understudied dimension within Co-operative Studies. Such co-operatives were obviously important: they provided social as well as economic

benefits, particularly for women and youth and for community development generally. As they developed, they reflected changes in rural life, in how they were operated, the kinds of activities they undertook, and the ways in which they represented rural societies to governments and to urban consumers. They are – or should be – another significant focus for Co-operative Studies; it is important to understand what happened to them during the settlement era, as they became institutionalized, as they adapted to the market place, as they tested the original assumptions under which they were formed, and as rural voices in most countries were overwhelmed by urban concerns. As the world's population grows, as rural depopulation becomes more important in southern countries, as food production, processing, and distribution become increasingly important issues in the international economy once again, the roles of co-operatives in rural society – in rural regeneration – will become increasingly important, a major field of enquiry for Co-operative Studies.

As one gains an appreciation for what co-operatives have meant for people engaged in settlement, one begins to realize that people “on the move” – to urban as well as rural places – readily embrace co-operative strategies to help them overcome obstacles. They banded together in kin groups, associated with others going through similar experiences, and created support institutions of various kinds to assist them as they moved and as they became established. Often, those strategies include the development of formal co-operative enterprises, which can be found in virtually all the great migration movements of the last 150 years, including the ones associated with the global trends of the present day.

#### ***The Challenges of Associations – the Working and Agrarian Classes***

The foregoing suggests that co-operatives in many countries have often been closely associated with working class and agrarian movements, thereby partly explaining their often very deep community bonds as well as their capacity to respond to many significant social/economic challenges. Those associations also help to explain why co-operatives gained prominence in the North Atlantic world from the later nineteenth century through the first few decades of the twentieth century; further, they can be helpful in understanding the nature of some specific movements or the ideologies of some specific groups of co-operators, for example, in Singapore and some urban centres in Africa and South America (e.g., Nairobi and Buenos Aires).

To see co-operatives as merely by-products of other movements, however, can be misleading, though it is an impression readily found in some general historical accounts of the movement. In part, that could be because the chroniclers have tended to be trained within labour and/or left wing circles, where the emphasis has been on searching for associations that particularly build the movement in which they are interested. In the process they tend to overlook the fact that co-op movements can have their own inner strengths, ideological perspectives, and institutional dynamics, all of which will ultimately differentiate them from even their closest allies. Making this point is important for understanding the continuing relevance for co-operatives (other movements often waning) and for showing appropriate respect for the ideas, practices, and structures of co-operatives as parts of a movement existing in its own right.

#### ***The Challenges of Association – The Social Economy***

Somewhat similar comments apply to the relationships between co-operative movements and the Social Economy. The concept of the Social Economy, much like the standard interpretation of the origins of the Social Economy can be traced back to the first half of the nineteenth century. They shared deep-seated concerns about how emerging, simplistic notions about the effective operation of the market were disrupting social relationships and impoverishing some communities even as they privileged others. As the years passed, the Social Economy grew slowly but steadily in France and Belgium somewhat belatedly in Italy, Spain, Portugal and Greece. It particularly gathered strength as the Roman Catholic Church gradually withdrew from its social programmes and as more people became interested in community-based responses to the pressures of industrialisation and urbanisation, a strong movement in many North Atlantic countries by 1900.

The possibilities of collaboration between the Social Economy and co-operative traditions can readily be seen. In some countries, particularly France, the two were deeply connected from the earliest days. As the International Co-operative Alliance went through its first few decades, essentially from 1895 to 1935, there were close links, involving exchanges at conferences, collaboration in publishing information, and support for some research activities. They shared leaders in common, most particularly Charles Gide and Albert Thomas.

In the thirties, the two movements tended to drift apart as Social Economy circles were increasingly attracted to academic, “scientific” discourse that, for many co-operators, seemed to be removed from institutional practice and contemporary priorities. Moreover, from the co-operative perspective, increasingly the methods of the Social Economy seemed to often to be determined by discussions among elites, without due respect for utilizing the democratic processes upon which co-operatives must rely.

In recent years, those tensions have subsided and the Social Economy concept, though in many countries often queried by new formulations, such as Solidarity Economy, has been gaining favour in countries where previously it had little support – such as Sweden, the United Kingdom, and English-Canada (because of deep associations with France, there have been strong associations with Québec for more than twenty years).

The challenge in the development of the co-operative/Social Economy relationship is essentially a respect for diversity. The Social Economy approach spans a range of community-based activities, including charities, associations, and foundations. In many jurisdictions it is expanded to include government organisations. To the extent that it fosters interests in such approaches and particularly comparisons and exchanges among them, it can be a very useful ally for co-operatives – and co-operatives can be important contributors to the development of the Social Economy. For those relationships to develop and deepen, however, it must be within a spirit of tolerance. This is not easily maintained, as it wasn’t some eighty years ago. Co-operatives, co-operative movements, and co-operative thought can certainly be viewed within a Social Economy context, but, like the other options within that tradition, it has its own identity, processes, and purposes that should not be ignored or glibly passed over.

### ***The Importance of Gender***

Another important, though under examined and undervalued dimension of the development of co-operative movements has been the role of gender. As in other historical fields, men (at least until recently) have tended to define what is important to study when considering co-operatives. This is not a simple matter to redress, requiring to some extent a recasting of the movement's roles and contributions. Many co-operatives had their beginnings – and continue to operate – primarily serving the needs of women. Consumer co-operatives, for example, have been and are patronized more by women than by men. It is not surprising, therefore, that the first strong manifestation of feminist interest in the movement was associated with consumer co-operatives – the International Co-operative Women's Guild. From its beginnings in the 1880s, the Guild – along with its national organisations – assumed the role of the conscience of the movement.<sup>xxvi</sup> In the later nineteenth century it sponsored some remarkable research into examining the challenges confronting women and their families in industrializing areas of the United Kingdom. It explored, with remarkable sophistication, given the state of methodologies in social science at the time, a wide range of social and economic issues. It pioneered in arguing that intelligent consumerism could be a defining force in modern life, by insisting that all engaged in production be fairly paid and that only healthy food be sold – words easily written or said but challenging to apply. As the clouds of war swept over Europe, many within the Guild became resolutely pacifist, a perspective that arguably had considerably cogency before and during World War One, but became harder to accept amid the atrocities perpetuated by Stalin, the Nazis, and other repressive regimes in the twentieth century. It was a perspective that ultimately weakened the Guild movement considerably.<sup>xxvii</sup>

That position though hardly provides sufficient explanation for the relative weakness until recent days of women and women's organisations within the movement, and even today one must query the depth of understanding and commitment. Co-operatives in many countries can fairly claim to be the first or among the first to “give women the vote” – extending in some instances well back into the nineteenth century. Historically, many co-operative organisations and leaders supported the Suffrage movement and campaigns for dower and other rights when doing so was not easy. Women, however, have not commonly been elected to boards of directors in proportions in any way commensurate with their membership numbers or, in the case of consumer co-ops, their patronage.

There are some exceptions: they have been prominent if not dominant in some smaller rural co-ops, for example, craft or poultry co-operatives. They have also early assumed important roles in housing, health, and childcare co-ops: i.e., in co-operatives that were very obviously extensions of their household concerns. Today the roles of women in SEWA, in financial institutions in Muslim communities, in Fair Trade, and in social co-operatives generally, suggest that women's efforts are becoming more important. On the other hand, women do not play significant roles in the governance of larger cooperatives, especially financial, agricultural, and consumer co-ops; nor are they common on the boards of second and third tier organisations (the wholesales, central financial institutions, and state/provincial/national apex organisations).

The roles of women as employees within co-operatives form another interesting but neglected subject for enquiry. They have been widely employed in consumer and financial co-operatives, usually on the “front line”, as cashiers and member service

representatives or tellers. They have played limited roles in senior management, typically in human resource or community relations capacities, although this is changing – but probably not much faster than with some of the competition. Women are engaged in senior levels more frequently in health and social co-operatives, in daycare and housing co-ops: in other words, once again, in co-ops where family responsibilities or professional associations give them immediate prestige and special expertise.

Why is this so, given the movement's public pronouncements on the importance of equality and fairness? Why is the record minimalist? Given the relatively limited research on gender issues, can we even be sure that the above generalisations are essentially correct? Are the apparent tendencies connected to the managerial approaches co-operatives have typically adopted from the practices of private enterprise? What exactly is the record in different countries? in different movements? in specific co-operatives? What are the roles of culture? How do – how should – co-operatives act when they emerge within cultures in which gender equality is not readily or traditionally accepted? To what extent, and in what ways, should they be leaders? Where they have been applied, how well have rules establishing quotas or even gender equality in elections worked out?

### ***Considering Relationships with the State***

The roles of the state in developing co-operatives is one of the major issues in Co-operative Studies. It should be seen as an issue for all kinds of co-operatives in all kinds of situations. There is a tendency to think of the issue in terms of co-operatives in the Global South or within the centrally-planned economies associated with the Soviet Union, China, North Korea, and Vietnam. It is important to do so, but it is equally important to consider the issue in terms of co-operatives operating within economies that are more market-driven.

The co-operatives in much of the Global South that were developed by imperial authorities or by independence movements tended to rely too much on state assistance and direction. In large part this was because the governments concerned were very dependent upon their co-operatives for economic development, particularly in agricultural production and rural credit schemes. This is very understandable if usually regrettable in the long run. When governments with scarce financial and human resources are attempting to implement rapid economic and social change, it is difficult for them to remain aloof from organisations that can quickly raise significant amounts of economic and human power. In some cases, too, the tendency towards unhealthy government interference occurred because many leaders from the 1960s through the 1980s tended to imitate approaches to co-operative development used by the centrally planned economies of Central and Eastern Europe and, as in the case of Cuba, from China as well.<sup>xxviii</sup> Many co-operative leaders were trained at least in part in the Soviet Union, East Germany, and China, and naturally brought back with them the attitudes and assumptions of their teachers and the co-ops they visited. One of the interesting features of Co-operative Studies is the way in which international trends and relationships are adapted as co-ops are created and developed, and not more so than in the development of co-operatives in the Global South over the last fifty years.

The roles of co-operatives within countries emerging from direct and indirect colonial control, therefore, are not simply analyzed and much work, particularly

comparative research, has to be done before we can generalize with any great degree of confidence. It should be one of the great themes for work in Co-operative Studies. It should delve deeply into the colonial past as well as into current cultural relationships, economic circumstances, and social change. It is not a story of unrelenting success though there are some remarkable accomplishments in several countries. The general development of movements in such countries as India, Sri Lanka, Japan, Korea, Argentina, Brazil, and Colombia has been remarkable, but there are inevitably examples of failure and lost opportunities: in other words, experiences not unlike those that can be found in the past and the present of northern movements.

In the last fifty years, Africa has often seemed to be a special case. Many of the movements in that continent have been sadly affected by the rapidity of changes, the cultural conflicts emerging from eccentric boundaries drawn by imperial masters, and, more recently, by the harshness of crudely applied “structural adjustment” programmes imposed by the international financial community. It nevertheless also contains examples of significant successes, for example, among financial and agricultural co-operatives in many countries. They are easily overlooked amid the difficulties that have affected other parts of the movement more severely.

Most importantly, though, co-operatives are playing useful roles in the emergence of the “new Africa”. Throughout the continent, new co-operatives are being formed to meet needs of HIV/AIDS sufferers and their families, to create employment, to provide housing, to participate in ethical trade production, and to meet the special needs of youth.<sup>xxix</sup> New cadres of leaders are emerging; more sophisticated and better informed public servants are appearing to provide assistance and leadership. If Africa was the “grave yard” of co-operatives for much of the twentieth century, it might prove to be the nursery for many new developments in the twenty-first.

The co-operatives within the former centrally planned economies of Central and Eastern Europe generally went through a very difficult time in the wake of *Perestroika* as they were, in part fairly – in part not fairly – accused of being puppets of the old regimes. In recent years, the co-operative model, based on healthier relations with the state, have begun to reappear and the future looks much better for co-operative development. In the remaining centrally planned economies, there are gradual reforms affecting the state relationship with old co-operatives and unfolding regulatory changes that seem to be giving more independence to new co-ops as they emerge.

The issue of state relationships, however, though much muted, is no less important in countries where market forces are given greater opportunities to function. Because co-operatives serve so many needs and because they are in different stages of development, they require sensitive and often complex relationships with the state. Agricultural co-ops have different needs than insurance co-ops. Consumer co-ops have different requirements from social co-ops. Governments affect the development of these various co-ops in different ways and not just through the legislation that enables them to exist. Moreover, the needs of a new co-operative are different from the needs of well established sophisticated co-ops. This is not unlike the ways in which governments deal with the diversity of the private sector, but the distinctive needs and potential of the application of the co-operative model must be understood and accommodated.

Co-operative Studies, by focussing on the varied and developing state relationships for co-operative development can and should play a major role in demonstrating what is appropriate, necessary, and practical.

### *Understanding Co-operative Effectiveness*

The success of the co-operative movement, of course, has always depended upon the effectiveness of its institutions. Co-operative Studies, therefore, must have a central interest in researching into, teaching about, and contributing to, the effective management of co-op organizations. There is a sprinkling of researchers in this field within business schools and schools of commerce within the North American, European, and Asian academy as well as in the co-op colleges. Though they are growing in numbers, there are still not enough of them, especially given the size and importance of the international movement and the range of issues that needs to be addressed. They have begun to create a specialized literature in the field but among those in the academy, especially in the North, there are very few opportunities to teach specialized courses on co-operative management and not much recognition that it is an important field to engage. The result is that people from the sector seeking specialized programmes in co-operative management at convenient locations and reasonable cost have trouble doing so. There is a particular problem for those involved in the governance or senior management of larger co-operatives.

The objective must be to make access readily available to people in all kinds and sizes of co-operatives through a mixture of on-line and in person teaching programmes. A few concentrations of interested researchers/teachers and a scattering of researchers, no matter how dedicated and enthusiastic, is not enough. It is one of the most pressing challenges confronting the field of Co-operative Studies. It is a challenge that should be considered from a wide movement perspective, and not just from the point-of-view of a specific co-op or sector, a given university or co-op college. As with so much else in Co-op Studies, it is the links beyond the local that are the important ones, the limitations and narrow interests of individuals and organisations that are the barriers.

As much as any other group engaged in Co-operative Studies, those interested in co-operative management have to strive to locate their work within the traditions, values, and principles of co-operative enterprise. This is not such a radical concept or one bereft of innovative possibility. In the late nineteenth and early twentieth centuries the co-operative world provided many original entrepreneurial structures and innovations. Co-operators from that time wrestled with the consequences of federations involved directly in the market place and found ways to make them work. They sought different ways to raise capital and found some by attracting resources through mass organization drives, innovative contractual relationships with members, and revolving member accounts. They mingled volunteers with paid employees in creative ways; they used networks to raise social capital that dwarfs what most consider possible today. Some of the early institutional structures (for example, the major co-operative wholesales, some of the farm co-operatives, many of the financial co-operatives) were among the more innovative business organisations of the late nineteenth century; they substantially drew their inspiration and ideas by the logic of their values and basic purposes. They used membership bases to think about possible new kinds of enterprise. They were not boxed in by mantras about “what business are we in”...they were in the member and community enhancement business. They found ways to make enterprises out of social and economic

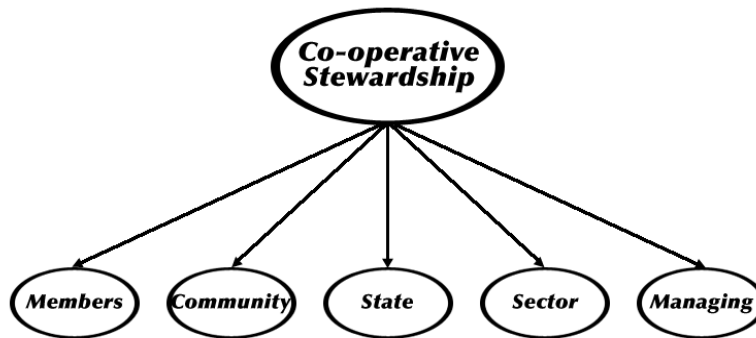
needs and they used the surpluses to enhance the lives of the people they served.

In the last seventy or eighty years co-operatives have tended to emulate practice and measure performance essentially by replicating practices developed within the private sector. The ideas associated with “Management by Objective”, Peters, re-engineering, and “values-based management” have all echoed through the corridors of many co-operatives. In many instances, imitations of private enterprise practices have contributed significantly to the development of more effective organizations and those contributions should be acknowledged.

At the same time, the imitation of practices from organisations that typically have different fundamental purposes and structures ultimately transforms and homogenizes unthinking imitators. Members become customers, the common good gets lost in the struggle for individual advantage, conventional rather than innovative ways are pursued to raise and reward capital, the great co-operative advantage of long-term perspectives gives way to short-term advantage, the value of collaborating with co-operatives in different fields becomes muted, and the relationships between employed leaders and elected leadership become confused. Much that has happened within the public sector and in what is called the volunteer sector in Canada and the United States has been ignored, even though some of the innovations in those sectors might well have been useful. But above all, much in the co-operative tradition has been passed over too quickly and not all of the distinctive needs of co-op organisations have been well met.

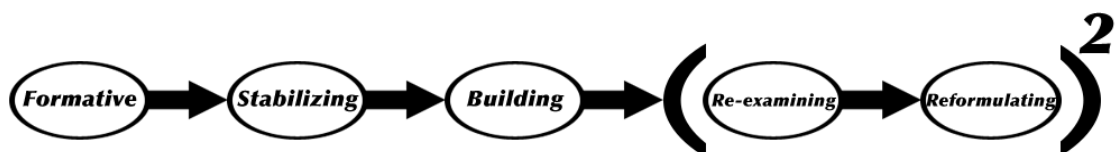
The primary source for understanding how co-operatives could be most effective ultimately must be the movement’s values and principles – and the institutional dynamics that should flow from them. A useful if limited beginning to this kind of enquiry can be found by considering the International Co-operative Alliance’s 1995 *Identity Statement*. Even a superficial reading of it and its background documents will suggest that management of co-operatives is complex and varies with the culture, size, type, and purposes of co-ops. The *Statement* provides only a beginning point, but a useful one from which co-operators and people studying co-operatives can work out the practices and alternatives they can use in building specific co-ops. It invites the serious analysis of the co-operative experience – with large as well as small co-ops, with innovative as well as traditional ownership structures, with broad as well as very focused community relations, and with various kind of state relationships.

In fact, one could argue that the *Identity Statement* raises five inter-connected organisational dimensions or spheres of activity that require special attention from those interested in the effective management of co-operative enterprise. They are: engagement of members; involvement in communities (however defined); associations with other co-operatives (and not just their own kind); relations with the state; and, keeping these four spheres in mind, the ways in which they manage their resources. The over-all direction of the co-operative, paying due attention to all these spheres of activity, can be thought of as “co-operative stewardship”, the special responsibilities leaders (elected and employed), members, and staff undertake in carrying out their responsibilities.



These obligations are not easily met. The concept of membership varies with types of co-ops, making easy answers impossible and the potential benefits of membership are not as widely discussed or understood as they once were. The idea of community is also complicated, particularly as co-ops grow larger, and community connections change, and old networks of kinship and neighbourhood decline. The ways in which co-op relate to each other – historically through federations, alliances, and informal collaboration – always require rethinking and adaptation, not just the easy alternative answers through amalgamations and mergers. The issues of conventional management – such preoccupations as marketing approaches, accounting systems, human resource development, long term planning, maintenance of physical plants, succession planning – none of these is any less pressing than in other forms of enterprise, private or public, but they are – or should be – influenced by the other spheres of activity. No major activity within a co-op takes place in a vacuum; the parts – all the parts – shape the whole.

Another vital dimension of the management of co-operatives is that co-ops typically go through stages. The formative stage, often dominated by strong personalities and reflecting widespread optimism even excitement, is typically dominated by pressing needs for education in the sense of helping the people engaged in its development learn their responsibilities. The organizing groups usually have to struggle to meet the regulatory requirements for starting operations, to develop business plans, to arrange for credit, to decide who will manage, and to establish how management will be done.



The next stage, what might be called the stabilizing phase, develops as the co-op opens its doors and actually has to operate in the market place, either the competitive market place as it is usually understood or, in the case of many social co-operatives, in market places determined by government policies. In the process, new leadership often emerges, basic objectives are reviewed and perhaps altered, core groups change, workplace discipline moderates group enthusiasm, and relationships with the co-operative sector often change. The internal management issues often intensify as the

demands of meeting payrolls and making difficult decisions become inescapable and frequent challenges.

As the co-op is stabilized, it typically enters into a “building” phase, when what has proven to be successful is used to launch new initiatives or to increase the economic or social value distributed to members and their communities. Staffs change, becoming more specialized and often driven by the concerns of professional associations and career ambitions. Boards step back and are less involved in daily affairs; board/management relationships need to be revised and new kinds of directors are often required. The financial systems become more complicated and member relationships can easily be ignored as work places become more routinized. Institutional loyalties grow, as success is achieved as those involved with the co-operative become increasingly preoccupied with its challenges.

Inevitably, even the co-ops that go through the most successful growth periods will confront difficulties at some point, just like any other organization. The challenges might come from the “external world”: a new competitor, changing technology, a different regulatory system, a depressed local region. They may come from within: a badly managed succession, a flawed investment decision, an expansion that did not work out as planned, a managerial crisis, board ineffectiveness. Whatever the cause, the challenge will force a re-examination of the co-ops activities, how it carries out its business, how it relates to its communities and other co-ops, perhaps what it expects from the state, almost certainly how it focuses its attention. The result is a reconstruction of its activities and hopefully a kind of rebirth. It happens frequently, one of the reasons why so many co-ops last decades, even more than a century; indeed, a “survival rate” that rivals if it does not exceed that of the private sector.

How the process of rebirth is handled, however, is fundamentally important for any co-operative. It can lead to the jettisoning of much of its co-operative commitment by focusing only on the conventional business issues without considering sufficiently the implications for members, communities, wider co-operative structures, and impacts on the state relationship. Doing so can, of course be difficult in times of stress but they may also lead to more and perhaps better options. The remarkable point about co-ops is that many of them have gone through many such challenge/reorganisation eras and have found ways to make the adjustments while remaining essentially true to their underlying values and principles.

This common pattern of development is often complicated (but made more interesting for analysis) because it can be discerned in so many different contexts. The stewardship of co-operatives and the management of them take place within cultures, amid conceptualizations of the basic purposes of co-ops, in specific economic situations, and among particular classes of people. In the end, context may be as important as any other factor in determining the effectiveness of co-operatives and in deciding how the challenges, ongoing and unavoidable, or special and dramatic, can be met.

Throughout all of these kinds of analysis, of course, underlying questions about the nature of co-operative democracy remain important. These are time and situation bound. They are also fundamental to the human condition. As far as we can tell, human beings have always been concerned about effective relationships with others, with kin, with neighbours, and with strangers. They are perpetually preoccupied with negotiating

power within groups, with elders, with power brokers, with appointed or elected leaders. For centuries, many of humankind's greatest thinkers have been concerned with the possibilities of democracy, its practices, its scopes, and its theoretical foundations. They are issues that run too deep, that are too complex, to be reduced to simple matters of voting at elections, as important as good electoral practice is, within democratic states or within co-operatives.

Co-operatives have been developed in the belief that democratic processes can be as useful in developing economic and social institutions, as they should be in providing good governments. If democratic process can be trusted to wage wars and deal with disasters, why can it not be useful directly in helping to provide good food, adequate housing, and effective work places. "Democracy", however, is not a simple construct universally applied: within co-operatives, for example, its practices will vary somewhat beyond the requirements of elections and required elements of board responsibilities. What is the state of democratic practice today within co-operatives? Do we have a full understanding of how it works? What are the most effective practices in large co-ops? small? How id democracy practices within co-operatives of different types, sizes, and cultures? In the end co-operatives offer the promise of engagement...to individuals, families, and communities. Are they doing that well? Is it important? If it is, why is it not more widely recognized? How does it fit within conventional theories of the firm?

It is not likely that Co-operative Studies will provide a simple management theory that can fit all situations and address conclusively the issues around democratic control. One should not expect that sometime soon a local co-ops will be able to turn to a simple model to meet all its needs. It is certain, though, that efforts to understand the distinctive management, governance, and democratic requirements of co-operative enterprise will lead researchers into rich fields of diversity and into a range of questions rarely raised in the study of capitalist firms or government organisations.

### ***The Ideological Challenges***

All of the foregoing suggests some of the important ways in which the movement has been engaged fully or in part with some of the major issues of the last 160 years. It also begs the question: why is the co-operative model not more generally and seriously considered as we consider the many challenges of our own times?

There are many reasons, all important considerations for anyone engaged in Co-operative Studies today. Aside from the obvious complexities stemming from the diverse economic origins, varied cultural bases, and differing political frameworks suggested above, the movement's fundamental ideology was not – and is not – easily grasped. Typically, "outsiders" have had to struggle to comprehend its rather complex theoretical and social messages; they still do. Co-operativism did not flourish amid the ideological warfare of the twentieth century; a period that witnessed a long, harsh, and often violent struggle for hegemony among what became more prominent and certainly more aggressive ideological "camps" – laissez-faire capitalism, Marxism, various forms of socialism, and anarchism. It was a struggle that would shape much of contemporary history, ending with what many see as the triumph of laissez-faire liberalism, still others as the "end of ideology".<sup>xxx</sup>

For many reasons, co-operativism was poorly equipped for this struggle. First, though consumer co-operation and its theoretical perspectives came to dominate in

international co-operative circles and particularly the International Co-operative Alliance, it was far from the only influential theoretical base, as the foregoing suggests. Many worker, financial, and agricultural co-operative movements also had strong intellectual roots as well...and widely variable cultural contexts. This complex association of movements made it profoundly difficult for the international movement to present a common, united, and compelling alternative, a deadly weakness when compared to the other more easily grasped, reified, and assertive ideological perspectives. It was a situation that required deep and careful thought sustained over years, a commitment the movement did not undertake as well as it might have...and few outside researchers or thinkers picked up the challenge to meet. Thus, from a position of intellectual and research vigour in the later nineteenth and earlier twentieth centuries, the movement declined – despite periods of popularity and demonstrable success – as a commonly recognized alternative way to address the main issues of the day and to contribute to revitalized societies around the world.

The co-operative ideology, moreover, normally emerges out of practice, never a route that easily creates precision. People form co-ops because of pressing needs. Typically, they absorb some ideas and operating practices from others and then work out in their own ways how the co-operative model can be best utilized for their own needs. Aside from small networks of informed co-operators, only a few people begin with strong co-operative ideological positions drawn from the wider movement, though this sometimes occurs: for example, in countries with strong co-operative traditions, such as Sweden and Denmark, and parts of countries, such as Italy, Canada, and Japan. Most commonly, people develop their co-ops pragmatically, meaning that relatively few members (except in those rare instances where there are sustained and effective education programmes) grasp the movement's full potential. Co-ops tend to find their way through experience, seldom arriving at Iron Laws or pretensions to universality, seldom concerned about developing a strong and pervasive theoretical base. Put another way, deepening co-operative understandings have more commonly been the result of induction derived from experiences rather of deduction elicited from abstract theory. This approach does not lead easily to comfortable, simply stated generalisations.

Second, the more powerful ideological systems, which directly and indirectly have profoundly affected research agendas in the academy and outside for decades, have typically assumed a mixture of dismissive and patronizing attitudes towards co-operative endeavours. Most Marxist traditions were particularly critical,<sup>xxxii</sup> often arguing that co-operatives were useful organisations at a certain stage of capitalist development but ultimately inadequate for the reformation of society. For most of them, co-operatives typically created “false consciousness” and could not readily be counted in the vanguard of revolutionary change, though they might be useful in building support for more lasting endeavours in the early stages of mass mobilisation programmes. They, and most regimes that purported – or purport – to be Marxist (the centrally planned economies generally), were not willing to allow “co-operatives” under their control to pursue their own aims or foster member responsibility; they too eagerly intruded into daily governance activities, especially if co-operatives were large and important for the implementation of state policies.<sup>xxxii</sup>

In some ways, the attitudes pervasive in the academy and the liberal world dominated by capitalist ideologies have not been fundamentally different. There, co-

operatives have been often perceived as useful institutions when the market “failed” to provide fair or adequate value. They could be particularly well suited to small-scale capitalist production notably in rural areas or where market forces were slow to respond to individual or community needs. Their populist roots, too, so it has been argued, meant that they could help organize economic and social response to cultural needs, a kind of “social entrepreneurship” that can mobilize community resources not readily realisable through individual initiative or stock market enthusiasm. Many co-operatives have been – and are – powerful carriers of cultural traditions and community concerns and, even in an era of increasing globalisation, can mobilize financial and human capital in ways that the capitalist economy finds difficult.

These complex relationships with the most powerful ideological movements of the last 150 years – and the “quieting” of much of the movement in recent decades – raises an almost endless set of questions for researchers and practitioners within Co-operative Studies. They are questions that need far more research and thought than has been undertaken. They require an effective partnership between research (within and without the academy) and practice. What are the essential features of “co-operativism” or co-operative thought? What distinguishes it from other ideological systems? What does it have in common with each of them? How well have co-operators understood the implications of borrowing without much forethought from other systems? What have they borrowed or reshaped from them? Was such borrowing, in retrospect, positive or negative? How does culture affect how people understand co-operativism? How they manage co-operatives? How do religious perspectives affect understanding and purpose within co-operative organisations? How do economic and class relationships affect the ways in which co-operators understand and try to use their co-ops? Is it best to reflect on these issues through examining philosophical systems or through the history of ideas? How, as a researcher, can one come to terms with the populist roots of much co-operative thought? Ultimately, it is in answering such questions that those engaged in Co-operative Studies can support, qualify, or dismiss the movement’s claim to helping individuals and communities improve their lot.

### ***The Centrality of Education and Research and the Importance of Co-operative Studies***

Co-operative Studies is necessary in order to deepen the understandings and possibilities for research and teaching about the movement, its history and its thought. It is not entirely a new activity. One of the positive aspects of associations with working class and agrarian circles, for example, was the development of educational and some kinds of research activities in the movement’s early history. Many labour movements during their formative years created extensive educational programmes to inform, mobilize, and empower their members, often including information and advice on the possibilities of forming and developing co-operatives. In North America, for example, the Knights of Labour in the 1870s and 1880s were known for their educational work and for their championing of co-operatives.<sup>xxxiii</sup> In 1903 the co-operative movement in the United Kingdom played a major role in the development of the Workers’ Educational Association, in the process developing an interesting connection with Oxford University.<sup>xxxiv</sup> The International Labour Organisation, from its inception, paid special attention to the co-operative movement, organizing a special branch for its promotion as it became organized in 1919-1920. Its first director, Albert Thomas, a French socialist, was well known for strong sympathies for the movement. During the 1930s and 1940s,

the ILO's co-operative branch, especially through the work of George Fauquet, became known for its articulation of the "sector theory of co-operation", a useful and important perspective for the positioning of co-operatives within political economy during the middle of the twentieth century.<sup>xxxv</sup> It argued that co-operatives are vital parts of any flourishing economy, with special capacities, varying somewhat from society to society, to meet specific social and economic needs as long as the legislative framework was appropriate and there were effective support systems in place, provided by both governments and the already existing movement. The ILO promoted these ideas through its own substantial international education/training programmes after World War Two.

In Denmark, co-operatives were associated with, and became subjects of study within, the Folk Schools as they became prominent in the countryside during the later nineteenth and early twentieth centuries. The Folk Schools were bastions of peasant culture, emphatically Danish, very practical, rather unsystematic, but deeply rooted in rural life. They were instrumental in helping Danish rural people form many successful co-operatives to serve the needs of rural communities from the 1860s onward. The movement they established, in fact, became a model for many farming people – and governments – in many parts of the world for much of the twentieth century. The Folk Schools were emulated widely, adapted to the educational structures of other lands and the needs of people in very diverse rural areas.<sup>xxxvi</sup> In the United States, for example, many of the "land grant" universities, established by the federal government in the later nineteenth and early twentieth centuries, developed courses and programmes on co-operatives in their extension programmes, often borrowing from the methods and materials developed out of the Danish experience. To this day, there are co-operative extension and research institutes in several American land grant universities in the United States and, as a result, a well-established vein of co-operative research has been developed in the field of Agricultural Economics.

In Canada, to cite another example, several universities – including at one time the universities of Toronto, Laval, and British Columbia, as well as the main Prairie universities and the Agricultural Colleges in Guelph, Ontario, and Truro, Nova Scotia – also developed programmes concerned entirely or in large part with co-operatives; in some instances, they drew heavily upon the Danish experience. For the most part, though, that interest was a transitory reaction to the severity of the Great Depression and to the temporary availability of funds from the federal government. The most important exception to the passing interest of many on the academy was in the Antigonish developed at St. Francis University in Nova Scotia. That movement profoundly affected the development of co-operatives all across Canada and around the world through its innovative mingling of adult education and co-operative promotion on behalf of community development.<sup>xxxvii</sup> It pioneered in a form of community mobilization that has been adapted and widely applied in Canada and many other countries as well. Moses Coady, its most prominent early leader, became one of the best-known Canadians in many parts of the world.

In addition, many urban co-operatives developed their own educational programmes, usually operated through central federations or apex organisations. In 1919, national movements began to establish co-operative colleges, starting first in the United Kingdom, but evident in many other countries as well over the following fifty years. They became particularly important in Africa and parts of Asia when newly independent

states started co-op colleges as a way to assist in the development of co-operatives. In doing so, many of them received considerable assistance from northern movements, most particularly the Swedish co-operative movement through its international development programmes.

The colleges provided – and many continue to provide<sup>xxxviii</sup> – excellent support services for the development of co-operatives, particularly in their formative stages. Gradually, though, many of them tended to become inward looking, preoccupied with the movement's internal issues and focussed essentially on training. Moreover, they were generally inadequately funded to sustain prominent involvement with the major intellectual trends of the day; they had all they could do to meet the training and developmental needs of increasingly complex movements. That partly explains why the promising early involvement of co-operative thought in some of the key intellectual trends of the nineteenth century was not sustained in the twentieth century. It also helps to explain – along with the relative disinterest of most business schools and commerce programmes – why the theoretical base for the management of co-operative enterprise was weaker than it could and should have been, why co-operatives essentially depended more and more on imitating management practices and adopting management theories from other forms of enterprise. Co-operative colleges tended to be removed from universities and with insufficient resources (and mandates) to reach out widely to the general public; the resultant “information gap” among the general populace was not filled adequately by co-operatives themselves and certainly not by public educational institutions at either the secondary or post-secondary levels.

Fortunately, there are signs of rejuvenation within co-operative colleges, for example, in the United Kingdom, India, Tanzania, and Malaysia, where they are using new technologies to reach wider audiences and to attract the interest of young people. They are forcing reconsideration of the nature of co-operative enterprise and pointing out the possibilities for co-operative development to co-operators, policy makers, and people in communities. In doing so, they are reaching more people, but they do not have the mandate, funds, or opportunities to reach far into public or private educational systems where most people learn much of what they will understand about the world.

The academy, broadly defined, therefore, needs to be involved if the co-operative model is to be widely understood and co-ops are given the opportunity they deserve to have in the development of public policy discussions. Co-operative Studies specialists need to take more interest in the long experience of the movement in educational activities, assist in their modernisation, help pose and research the most pressing of the movement's question, assist in using the emerging the information distribution systems so that the “knowledge gap” between theory and practice can be more effectively bridged and public policy discussions engaged. They need to be engaged in helping develop relevant, systematic, and critical research into the co-operative movement, needs that are not currently well met. They need to develop ranges of rigorous and practical courses in a variety of disciplines within the academy and ultimately for inclusion as appropriate segments in the curricula at the secondary level. The opportunities are many, the possibility of engaging collaboration with communities as well as co-operatives is exciting, and the value of using new teaching technologies obvious...if one takes the time to consider them seriously.

### ***Conclusions***

What can we conclude, therefore, about how Co-operative Studies should be conducted? What is its current state? What are its needs? What are its parameters? First, it should invariably involve ongoing relationships between those who conduct research and those who are actively engaged in co-operatives. Not that these are always separate groupings: many people who conduct extensive research into co-operatives are also activists in one way or another; many who hold key positions in co-operatives or are involved in starting co-ops also undertake research in one form or another. The essential point, though, is that much of the research should be undertaken through collaboration between the observers and the observed, with both sides having the right if not the duty to validate or to disagree with the work of the other.

Much of Co-operative Studies, therefore, is a kind of Community Based Research, meaning adjustments for researchers from the academy, inclusion for researchers from outside it, association with co-operative activists, and involvement with co-operatives and their communities. It is not just a matter of transferring knowledge from seminar rooms and academic journals, as many in the academy tend to assume, though both those sources are important. It is not just a matter of finding a quick answer to a specific problem, though that too is important – and what too many in co-operative circles think ‘research’ is primarily about. It is about bringing all four groups – researchers within and without the academy, co-operative activists, and co-operative institutions – together in projects and activities that are mutually useful, producing results that are beneficial and understandable in different contexts.

It is about creating a knowledge base that informs teaching, learning, and reflection about the movement; one that can contribute to greater co-operative effectiveness, and that is accessible for policy makers. The current knowledge base is extensive but it is also generally inaccessible, even in many universities and co-op institutions, let alone in the public square where most people gain their understandings. Public media ignore co-operatives and politicians only rarely refer to them. They are not conspicuous in public debates, even as much as they were a century ago.

One way to address this issue is for those engaged in Co-operative Studies to collaborate in the development of systematic, extensive on-line resources drawn from the diversities of Co-operative Studies. Doing so could overcome the information gap that is one of the main reasons for the slow development of the field. The communication revolution that is one of the hallmarks of our era makes this all easily possible, given the resources potentially accessible around the world and the comparatively few funds needed to make it a reality.

Giving the movement its due means encouraging the development of a kind of international community among people interested in the field. It means creating more publication outlets for the work that is being done and working together to bring those publications to the attention of the public, policymakers and other researchers – within and without the field. It means reaching out across institutional homes – universities, co-ops, government departments, development organisations – so the synergies of mutuality can be fully achieved. It means nurturing young researchers in the academy so they can envision meaningful careers in the field. It means seeking ways to compensate researchers outside the academy so they can contribute. It means thinking strategically about organizing work, engaging others, building research agendas, communicating

results, and affecting practice. It means taking advantage of the increasing opportunities for fostering joint research.

The International Co-operative Alliance has made a singular contribution in this regard through its International Co-operative Research Committee. From modest beginnings in the 1980s, it has grown to develop regional associations in Europe, Latin America, and Asia; it works closely with groupings of researchers and co-operative human resource specialists in Canada and the United States. In two decades about 500 researchers, academic and private, and a growing number of co-operative leaders, particularly the Presidents, Directors and other key staff have been important contributors to this development.

Though much is starting to be done, one should not underestimate the challenges. Bringing academic and non-academic researchers, co-operative activists, and co-operative organisations together is not easy. Each group has its own research interests and needs, each its own criteria for measuring the value of research to be undertaken or received. Each has to strive to understand the needs of the others, to evaluate research in the context within which it is produced, and to understand the need for developing research for the common good. Assumptions and methodologies can differ as can style of presentation. Research, particularly as it tends to develop in the academy is conspicuous for its competitive nature – the “war of ideas” – a way of thought that may well ultimately not be amicable with the best that Co-operative Studies might contribute to the co-operative movement and to research generally: “come let us reason together” is an odd mantra in much of the academic world, as it is in the often highly competitive world of co-operative developers or even in the normal life of many co-operatives.

What then are the parameters of Co-operative Studies? They start with the recognition, seldom evident in public discourse, even less frequently in the academy and not always even in co-operative circles, that the movement, given its size, diversity, and history, is worthy of serious and distinct attention; that the confluence of numerous co-operatives movements around the world has created a force that has accomplished much and deserves to be better understood. The vistas that flow from this recognition are inevitably broad though ignored or only glimpsed in fragments by most people hastening elsewhere. They need to be explored more completely, their contexts explained more fully through the lenses of many different disciplines, so that understandings of culture, history, economic circumstances, and thought are fully comprehended; some of the myriad questions that could be asked usefully explored.

The movement exists in a bewildering diversity of communities all around the world. It needs a community of researchers and activists to explore its work and accomplishments, its failures and possibilities. They should be brought together systematically, strategically, and collaboratively in the field of Co-operative Studies.

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## *Endnotes*

<sup>i</sup> See Cheryl Lans, *University teaching of co-operative business and Philosophy in Canadian universities* (Victoria: British Columbia Institute for Co-operative Studies, 2005).

<sup>ii</sup> An exception within the field of Economics is Agricultural Economics in North America and Institutional Economics as it was practiced in the middle decades of the twentieth century.

- <sup>iii</sup> See the website of the International Co-operative Alliance (<http://ica.coop/ica/index.html>). In addition, there are (conservatively) some 200,000,000 members of co-operatives unaffiliated with the I.C.A. meaning that the total membership of co-operatives around the world exceeds one billion.
- <sup>iv</sup> There will not likely ever be a completely satisfactory way to estimate the numbers of people directly involved in co-operatives. Many people are members of more than one co-operative included in the total memberships of the ICA, but there are also many memberships that are family memberships, a factor that would greatly increase the numbers, especially in parts of the world where large families are commonplace.
- <sup>v</sup> Or US\$1,251,463,000,000. See World Development Indicators Database, World Bank, 1 July 2007. <http://siteresources.worldbank.org/DATASTATISTICS/Resources/GDP.pdf>.
- <sup>vi</sup> Ibid.
- <sup>vii</sup> See I.C.A. website (<http://www.ica.coop/coop/statistics.html>).
- <sup>viii</sup> Based on a list of co-operatives kept by the Canadian co-operative leader, Alexander Laidlaw, who made a note of every kind of co-op that he saw in a long life of involvement with the international movement. Laidlaw died in 1980 so the list would be much longer since in the interval many new types of co-ops have emerged meeting technological, energy, and social needs.
- <sup>ix</sup> See I.C.A. website (<http://www.ica.coop/coop/statistics.html>).
- <sup>x</sup> Various authors have dated the beginnings of the consumer movement back to the Enlightenment, the emergence of the guild system in the 12<sup>th</sup> century, the Germanic tribes, and the catacombs of Rome.
- <sup>xi</sup> See Chushichi, Tsuzuki, "Robert Owen and Social Science", in Chushichi Tsuzuki (ed.) *Robert Owen and the World of Co-operation* (Tokyo: The Robert Owen Foundation, 1992) pp. 31-48 and Gregory Claeys, *Citizens and Saints* (Cambridge University Press, 1989) p. 16.
- <sup>xii</sup> See Arnold Bonner, *British Co-operation* (Manchester: Co-operative Union, 1970). Pp. 116-136.
- <sup>xiii</sup> See Edward K. Spahn, *Brotherly Tomorrows: Movements for a Cooperative Society in America, 1820-1920* (New York: Columbia University Press, 1989) and Carl J. Guarneri, *The Utopian Alternative: Fourierism in Nineteenth Century America* (Ithaca: Cornell University Press, 1991).
- <sup>xiv</sup> See Henri Saint-Simon, *Introduction aux travaux scientifiques de XIX<sup>e</sup> siècle l'industrie. Nouveau Christianisme* (1825), and Keith Taylor (ed.), *Henri Saint-Simon: Selected Writings on Science, Industry and Social Organization* (Holmes & Meier, 1975)
- <sup>xv</sup> See J. Birchall, *The international co-operative movement* (Manchester: University of Manchester Press, 1997), *passim*, and Jean-François Draperi, "The Ethical Foundations and Epistemological Position of Co-operative Research" in Ian MacPherson and Erin McDougall-Jenkins, *Integrating Diversities within a Complex Heritage* (Victoria: British Columbia Institute for Co-operative Studies, 2008), pp. 323-344.
- <sup>xvi</sup> The countries selected for the following brief discussion are the countries that tended to become the most prominent in the generally Eurocentric development of the movement between 1850 and 1950. They are briefly discussed to demonstrate the complexities and richness of the sources for co-operative development and co-operative thought. It ignores other countries in Central, Eastern, and Southern Europe in which co-operatives were significant. It leaves for later discussion the growth of co-operatives in other parts of the world.
- <sup>xvii</sup> For Professor Borzaga, see <http://www.emes.net/index.php?id=327>, (with Roger Spear, eds.) *Trends and challenges for Co-operatives and Social Enterprises in developed and transitiona countries*, Edizioni 32, Trento, ottobre 2004, and (with Jacques Defourny, eds., *The Emergence of Social Enterprise* (New York: Routledge, 2001). For Stefano Zamagni, see [http://www.jhubc.it/html/professors\\_detail.cfm?idProfessor=4970C89C-E744-29CC-3C634084A2](http://www.jhubc.it/html/professors_detail.cfm?idProfessor=4970C89C-E744-29CC-3C634084A2), and *An outline of the History of Economic Thought* (1993) and *Financial globalisation and the emerging economies* (with J.A. Ocampo, R. French-Davis, C. Pietrobelli (2000)). For a general account of the Italian consumer movement see John Earle, *The Italian Cooperative Movement: A Portrait of the Lega Nazionale delle Cooperative e Mutue* (London: Allen & Unwin, 1986), Zamagni, LEED
- <sup>xviii</sup> See Peder Aléx, "Swedish Consumer Cooperation as an Educational Endeavour", in Ellen Furlough and Carl Strikwerda (eds.), *Consumers against Capitalism? Consumer cooperation in Europe, North America, and Japan, 1840-1990* (Lanham: Rowman & Littlefield Publishers, Inc., 1999), pp. 241-266; J.M. Mulani, *Report on the Study of Swedish and British Co-operative Movement* (Ahmedabad: Gujarat State Co-operative Union, 1966); Anders Hedberg, *Consumers Cooperation in Sweden* (Stockholm: Kooperativa Föbunds Bokförlag, 1949 and 1957), and especially, Victor A. Pestoff, *Between Markets and Politics: Co-operatives in Sweden* (Frankfurt am Main: 1991) and Robert Schediwy, "The Consumer Co-operatives in Sweden" in Johann Brazda and Robert Schediwy. *Consumer Co-operatives in a Changing World, Volume One* (Geneva: International Co-operative Alliance, 1989), pp. 232-339.
- <sup>xix</sup> See Victor A. Pestoff, *Between Markets and Politics: Co-operatives in Sweden* for a stimulating discussion of these issues.
- <sup>xx</sup> See *Swedish Farmers' Organisations* (Stockholm: Sveriges Lantbruksförbund, undated) and *Farmers' Cooperation in Sweden* (Stockholm: LTs förlag, 1980).
- <sup>xxi</sup> See Kaj Ilmonen, *The End of the Cooperative Movement? Sociological Essays on Cooperative Affiliation and Morality* (Helsinki: Labour Institute for Economic Research, 1992), Kaj Ilmonen, *The Enigma of Membership* (Helsinki, 1986), and Robert Schediwy, "The Consumer Co-operatives in Finland:", in Johann Brazda and Robert Schediwy. *Consumer Co-operatives in a Changing World, Volume Two* (Geneva: International Co-operative Alliance,

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1989), pp. 575-668. An excellent introduction to contemporary Finnish thought about the challenges confronting the co-operative movement can be found in S. Skurnik and V. Vihriälä (eds.) *he Role of Cooperative Entrepreneurship in the Modern Market Environment* (Helsinki: Pallervo, 1999).

<sup>xxii</sup> See Ian MacPherson, *Hands Around the Globe: The World Council of Credit Unions and the International Credit Union Movement to 1996* (Madison, 1999), pp. 5-76 for a discussion of the emergence of this network.

<sup>xxiii</sup> See Patrick Develtere, *Co-Operation and Development with Special Reference to the Experience of the Commonwealth Caribbean* (The Hague: Acco, 1994).

<sup>xxiv</sup> See J.G. Craig, *Multi-National Co-operatives: an Alternative for World Development* (Saskatoon: Western Producer Books, 1976).

<sup>xxv</sup> See Birhcall, *The international co-operative movement, passim*.

<sup>xxvi</sup> J. Gaffin and D. Thoms, *Caring and Sharing: The Centenary History of the Co-operative Women's Guilds* (Manchester: Holyoake Books, 1993; Author not given, *Maternity" Letters from Working Women* (London: G. Bell, 1915 and M.L. Davies *Life as we Have Known it History of ICWG*

<sup>xxvii</sup> See Gil Scott, "Darkness at the End of the Tunnel: pacifism, Democracy, & the Women's Co-operative Guild in England in the 1930s" in Joy Emmanuel and Ian MacPherson, eds., *Co-operatives and the Pursuit of Peace* (Victoria: BCICS, 2007, pp. 73-84.

<sup>xxviii</sup> See J. Birchall, *The international co-operative movement* for discussions of this problem in many parts of the world.

<sup>xxix</sup> See Katherine Rollwagen, *A Choice for the Living* (Victoria: BCICS, 2008) and Ian MacPherson, Robin Puga and Julia Smith, *Youth Reinventing Co-operatives* (Victoria: BCICS, 2006).

<sup>xxx</sup> Francis Fukuyama, *The End of History and the Last Man* (Toronto: Maxwell Macmillan Canada, 1992).

<sup>xxxi</sup> There were, of course, significant exceptions, notably in Italy, France, and parts of Latin America, where less doctrinaire and flexible forms of Marxism emerged and supported the effective development of co-operatives generally independent of the state.

<sup>xxxii</sup> The role of co-operatives within the centrally-planned economies of Central and Eastern Europe, as well as in China, North Korea and southern countries that emulated the Communist world needs to be considered more carefully. In the ideological swings of the 1980s and 1990s, the common assumption became that the co-operatives in the Communist countries were akin to state agencies. It is easily ignored that the co-operatives forced Lenin to accept their survival and that co-operatives may well have been centres of resistance to central state policies as well as agencies for local empowerment. They are possibilities that need to be explored seriously by researchers.

<sup>xxxiii</sup> See G.S. Kealey and B.D. Palmer, *The Knights of Labour in Canada* (New York: Cambridge University Press, 1982).

<sup>xxxiv</sup> See Lawrence Goldman, *Dons and Workers: Oxford and Adult Education Since 1850* (Oxford: Clarendon Press, 1995).

<sup>xxxv</sup> See George Fauquet, *The Co-operative Sector* (Manchester: Co-operative Union, 1951).

<sup>xxxvi</sup> Uffe Østergård, "Peasants and Danes: The Danish National identity and Political Culture". *Comparative Studies in Society and History*, January 1992, pp. 2-27 (see particularly pp. 16-18).

<sup>xxxvii</sup> Michael R. Welton, *Little Mosie from the Margaree: A Biography of Moses Coady* (Toronto: Thompson Educational Publishing, 2001).

<sup>xxxviii</sup> See, for example, <http://www.co-op.ac.uk/> for the extensive programme offered by the Co-operative College in the United Kingdom today and in Moisha.