

1 Cooperatives and social transformation

An assessment of the global cooperative movement and its diverse trajectories

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1 Introduction

All movements have their founding myths. For the cooperative movement, the myth centers around the Rochdale Society of Equitable Pioneers, which opened a small store in Rochdale, England, in 1844. A group of penny-pinching weavers threatened by industrialization and battered by unscrupulous merchants and the winds of social and economic change, the Pioneers took matters into their own hands and started a store owned and operated by the group's members. Because of their commitment to community solidarity and various policy innovations, the Rochdale store succeeded where other similar efforts had failed, and as it grew and word of its success spread, the model was rapidly adopted in other parts of England, spreading quickly to Europe and North America and, from there, to the rest of the world (Fairbairn, 1994). Today, the cooperative movement spans the globe, with over a billion members in over 100 countries, firmly embedded in the economies of countries large and small (WCM, 2024).

As with most founding myths, this one has elements of truth, but it also obscures other dimensions that have played an important role in creating the global cooperative movement that exists today. Yes, the Rochdale Pioneers succeeded where others failed, but they built on ideas developed by others who had come before them. It also obscures the fact that there were many paths to cooperation, and not all of them originated in Britain. Not only is it the case that other models of cooperation were developed in Europe, also in the mid-19th century, but as the movement expanded around the world, it encountered and merged with local traditions based on community solidarity that were embedded in local cultures and practices.

The Rochdale myth also tends to emphasize that cooperatives are isolated, that they spring up thanks to the efforts of groups of people in response to local conditions, which obscures their interconnected nature. Indeed, we refer to the cooperative *movement* because, like other social movements, cooperatives do not take shape and do not function in isolation (Develtere, 1994). They have an intimate relation and interact continuously with their socio-political and socio-economic environments. The historical context, cultural setting, and socio-economic and political

environments in which cooperatives originate and function all differ significantly. This leads to a diverse, heterogeneous, and colorful landscape. Even the rapidly globalizing forces of the last 100 years have not led to a uniform or tightly structured cooperative movement. This is no surprise because social movements are perpetually engaged in a dynamic process of creation, diffusion, and convergence.

Usually, cooperatives are *created* by people as a reaction to specific, most often local, conditions. Through their joint action individuals show collective or social agency and the conviction that they must work together to pursue their shared interests. In this way, each new cooperative is an experiment and an attempt to change and innovate.

This initial creative process normally goes hand in hand with a lot of enthusiasm and belief in the uniqueness of the solutions found to address challenges. The initiators see themselves as pioneers. They ascribe to themselves the role of mission bearers having a convincing message for people in similar conditions. Once models have been tested and established, they seek to expand to other territories and circumstances. This not only leads to the *diffusion of the model* but also to hybridization as the cooperative recipes are selectively copied and adapted to local conditions. Sometimes these pilot models are promoted or imposed in a more forceful way, for example, when, at the end of the 19th century, the British colonizers introduced the “classical British-Indian Pattern of Cooperation.” After scrutinizing the different cooperative practices in Europe, the British Colonial Office thought that the German Raiffeisen model of cooperation was best fit for the colonies in Asia, Africa, and the Caribbean, especially when it would be accompanied by decisive tutelage by a special cooperative government agency. For the British colonies, this led to the unified model developed in the UK with primary societies at the bottom and a single cooperative apex body at the top. This experiment of diffusion happened at the same time that French colonizers tried to export their own social economy model, like the one developed in France itself. The basic trust was that in France as well as in its colonies, not only cooperatives but also mutual societies and associations could and should join forces in optimizing or correcting the existing socio-economic model in favor of the colonial traders (Wanyama et al., 2008; Bennison, 2025). The fact that we still find traces of these initial models in many former colonies illustrates the pervasive path dependency of social movement or cooperative trajectories. It is therefore no surprise that in a country like the DR Congo, one will find a strong adherence to a model that resembles the one found in its former colonizer, Belgium, where cooperatives are very strongly embedded in and entangled with other organized social movements such as the labor or the farmers’ movement.

The process of diffusion and hybridization is a never-ending story inasmuch as one cannot fully understand the heterogeneous and colorful palette of the global cooperative movement without seeing how the credit union movement is promoting self-help and the common bond principles dear to North American culture, how the Indian dairy cooperative model showed the road map for many East African countries, or how the Korean Community Credit Cooperative Model is expanding to places as diverse as Laos, Fiji, and Uganda with primary credit cooperatives that combine financial inclusion with income-generating activities.

Like all social movements, cooperatives have tried to join forces with those that choose similar cooperative ways and vehicles for collective action. This happened as soon as the cooperative movement took root. Regional and national collaborations were tried out, congresses were organized, and cooperative federations were established. Looking for *convergence*, seeking unity in vision, action models and organizational formats transform locally oriented and isolated cooperative action into a prolific process with national and even global ambitions. Already in the second half of the 19th-century contacts were established between cooperators. Collective reflections on the reasons to develop cooperative alternatives and the best ways to realize them circulated all over Europe and beyond, leading to the founding of the International Cooperative Alliance (ICA) in 1895 with delegates from countries as far apart as Argentina, Australia, England, Denmark, France, Germany, Switzerland, Serbia, India, and the US. This convergence continues in the work of the ICA, which today can be understood as one of the world's largest democratic social movements.

In the rest of the chapter we will look at the development of cooperatives around the world, paying attention to both their similarities and their differences.¹ In some ways the Rochdale model, as well as other European models, became part of a colonial project and, like other colonial projects, became hybridized through their interactions with local institutions and traditions (Degyansky, 2025; Molefe, 2025). We will look specifically at the Anglo-American development; the diverse European models; cooperative development in Asia, with a focus on China; the African experience, with a comparison of cooperative development in Kenya, Tanzania, Zambia, and South Africa; and, finally, a discussion of Latin America, where the movement has been affected by another colonial institution, the Catholic Church, as well as revolutionary conflict in its more recent period. After the historical overview, we will return to each of the regions to briefly look at how the cooperative movement can be understood as, in a sense, two movements, one firmly in the mainstream of the global economy and another that is more oriented toward social transformation, and what this means for the future.

2 The historical development of cooperatives

Anthropologists may be quick to point out that cooperation has been a feature of all human societies since we emerged as a species; this is evidenced by studies of preliterate societies where they still exist (Bowles and Gintis, 2011). Here we will look at the development of cooperatives as an institutional form and a social movement as a response to the drastic social and economic changes brought on by the Industrial Revolution. This means that we start out by discussing the Anglo-American context, where the Industrial Revolution arose and its effects were first felt.

2.1 The Anglo-American context

One of the things that the Rochdale myth obscures is its own historical roots. For hundreds of years in Europe, economic activity was governed by ideas of the

“moral economy” promoted by the Catholic Church, which forbade practices such as usury and excessive profits (Claeys, 1987; Warren et al., 2025). Those barriers began to break down under the pressures of the rise of the use of money in an exchange-based economy—in other words, the development of capitalist markets in the 17th and 18th centuries. Coupled with enclosures that drove peasants off the land and into cities, the Industrial Revolution led, on the one hand, to gross inequalities but also to increasing awareness of the broad immiseration of those not fortunate to be either nobles or capitalists.

The miserable conditions of the emerging working class were not lost on some of the industrialists themselves. Chief among them was Robert Owen, one of the most successful early industrialists in the UK, in part because of reforms he instituted to advance the health and well-being of his workers and their families. In 1820, he began to advocate for the establishment of self-sufficient cooperative communities that would eventually be owned in common by their members (Madden and Persky, 2024). His ideas, which were more visionary than practical, were then taken up by William Thompson, who combined Owen’s vision with utilitarian principles to articulate a political economics of cooperation and lay out the essential elements of the cooperative movement: voluntarism, common ownership, and democracy. Thompson argued that in self-sufficient communities of 500–2,000 people, everyone, regardless of sex, race, or creed, could work together cooperatively. The equality of all members would be reflected in their contributing according to their capacity, participating in decision-making in the community, and getting their subsistence from the produce of the community (Kaswan, 2014).

Active promotion of the cooperative community scheme led to the establishment of hundreds of local cooperative societies between 1826 and 1835 in the UK as well as a few in the US, although most of these failed (Cole, 1944). These early societies were centered around the idea of establishing a self-sufficient community, as Owen and Thompson advocated. Often, they would establish a store that would sell goods at the going rate (e.g., not at a discount), with the idea that the profits would be put toward the development of the community. The development of a self-sufficient community was, in fact, part of the original plan for the Rochdale Pioneers, although they abandoned the idea by 1860 as they chose instead to return the profits to their members—one of their most important innovations (Madden and Persky, 2024). The abandonment of the community idea, however, meant that cooperatives became enterprises much like any other in that they were operated for the benefit of their owners, except that in their case the owners were members of the community that used it, not entrepreneurs or investors. The model was successful. As they grew, the Rochdale Pioneers and other cooperative societies initiated a number of important innovations in the retail trade, and by the 1930s, the Cooperative Wholesale Society (CWS) was responsible for fully one-third of all retail distribution in the UK.

Although some experiments with cooperative enterprise in North America began in the mid-18th century² along with limited attempts to set up cooperative communities, the success of Rochdale inspired the development in the mid-19th century of a cooperative movement among the working class in cities in the US.

The idea took off, and the latter part of the 19th century saw extensive growth of consumer, worker, and agrarian cooperatives, in part tied to the populist movement from the 1880s to 1910s (Goodwyn, 1976). During the Great Depression, consumer and agricultural cooperatives gained support from President Roosevelt and grew substantially (Pencavel, 2020).

The cooperative sector in Canada grew out of some of the same streams of thought and activism as the UK and US. Historically, it has been dominated by agricultural concerns (Birchall, 1997); also notable is the Antigonish movement in Nova Scotia, which introduced a novel approach focused on local education and organizing in rural areas (Crane, 1983). The sector has seen substantial growth in financial and retail cooperatives, although fully a third of all cooperatives in Canada are still based in rural areas (CMC, 2024).

Overall, the 20th century was marked by periods of growth, contraction, and rebound on both sides of the Atlantic. Changes in economic patterns and the growth of large-scale corporations that in some cases adopted the innovations introduced by the cooperative movement made it difficult to compete, especially for smaller local societies, and in some cases the specter of the Cold War threw an ideological shadow on the movement. After some struggles in the 1980s, the movement in the UK began growing again in the 2000s, with significant consolidation in the retail sector around The Co-operative Group.³ Cooperatives in the US are more difficult to track due to the lack of national legislation and the fact that they remain largely independent and divided into distinct sectors, with agricultural cooperatives remaining largely separate from consumer, financial, and worker co-ops. Nonetheless, they are deeply embedded in the US economy (Deller et al., 2009).

2.2 *The European context*

In Europe, there is a long history of association dating back to the medieval period. However, at that time a voluntary group could not exist outside the jurisdiction of the Church, the State, or some other institutional order (Defourny et al., 2000). In the 18th century, as a number of scholars have noted, freedom of association started to make breakthroughs in several European countries (e.g., Gierke, 1958). Friendly societies, providing members allowances in case of sickness, grew in number. Early cooperative experiments include the cheesemakers' cooperative established in Franche-Comté (France) in the 1750s (Shaffer, 1999) and the Fenwick Weavers' Society in Scotland in the early 1760s. They got ideological support from different currents of thought, such as associational socialism, social Christianity, social liberal thinking, and, beginning in the 19th century, an anti-capitalist and anti-Marxist school of thought commonly referred to as solidarism.

Some became established models, such as the Rochdale model discussed above or the "Spolok Gazdovsky" (the "Association of Farmers") founded in current day Slovakia in 1845. The latter became known as the first credit cooperative in Europe. Its social cohesion was reinforced by several rules, such as members' commitment to a moral life, the fight against alcoholism, attendance in Sunday schools, and the obligation to plant two trees in a public place every year (Šúbertová, 2016).

Some of these cooperative experiments took root locally but also expanded to other places. This was the case with the *Vorschussvereine* or peoples' banks, as conceived by the German economist and politician Franz Hermann Schultze-Delitzsch. The first one was established in the village of Delitzsch in 1850. At the end of that decade there were already more than 200 such banks. While Schultze-Delitzsch focused on the lot of the urban poor, in the early 1860s Fredrich Wilhelm Raiffeisen established the first rural credit cooperative societies in Germany on slightly different principles. Convinced that fighting rural poverty implied fighting dependency first, he promoted the three "S" formula: self-help, self-governance, and self-responsibility. He set up several social enterprises, such as a communal grain and bread society and a printing house. The most important element, however, was the credit society. This cooperative was administered according to very specific principles, such as having a focus on a specific locality, relying on volunteer leadership, unlimited liability for members, and the allocation of surpluses to an indivisible reserve. The local credit cooperatives became interlinked in central clearinghouses or federations. Over time, the "Raiffeisen model" spread to other German-speaking regions and countries across Europe. In Italy it became very popular as the Luzzatti model, named after its promoter, the political economist Luigi Luzzatti. Eventually it unrolled beyond Europe to influence credit union development in North America, including, importantly, the Caisse Desjardins in Quebec, Canada.

In most European countries the cooperative sector has expanded very rapidly and become part and parcel of the European welfare model. Agricultural cooperatives, consumer cooperatives, housing cooperatives, and cooperative banks have grown into respected and omnipresent economic actors integrating ever further into real cooperative conglomerates. Depending on the socio-political dynamics in the different countries, cooperatives became intertwined with the dominant religious or ideological pillars, interacted intensively with or took some distance from the very influential farmers' and workers' unions, were more or less intimate with the dominant political movements, and had a collaborative or more antagonistic relation with the local or national state apparatus.

2.3 *The Asian context*

In Asia, before modern cooperative practices came into being, traditional cooperative-like activities were prevalent, based on mutual help or reciprocal exchanges of labor (Onda, 2014). All these efforts were voluntarily made either in families or in local communities, representing moral principles and the spirit of collectivism.

As noted above, Germany became a model for Asia's early cooperative movement. There are at least three reasons for this. First, one of the original purposes of the early cooperative movement in Asian countries was to provide credit to peasants at moderate interest rates. The historical records of 19th-century credit cooperative development in Germany, be it the Raiffeisen model or Schultze-Delitzsch model, were well known (Rhodes, 2012). Second, it was widely regarded that the Raiffeisen model had successfully helped the indebted rural poor in Germany and enhanced the country's peasant economy (Id.). A third general explanation for the popularity of the

German model emphasizes the fact that the social structure in Germany at that time was thought to be relatively similar to that of Asian countries (Gierke, 1958).

India was one of the first Asian countries in which modern cooperative practices were transplanted from Europe. The Indian cooperative movement was born out of a peasants' revolt that occurred during the second half of the 19th century. In response, the British government, noticing the success of the cooperative movement in Europe, decided to organize a credit scheme for Indian farmers as a remedy against rural indebtedness. Under this context, the Raiffeisen model of the German agricultural credit cooperatives was introduced, and attempts were made to establish mutual-aid credit cooperatives, resulting in the enactment of the Indian Co-operative Credit Societies Act of 1904 (Dao, 1975; Ghosh, 2007). This later became a standard pattern of cooperative legislation in all former British colonies and in the Commonwealth (Münkner, 2006). Similarly, in Japan, the early cooperatives were organized along the Raiffeisen lines; the Industrial Cooperative Law, which was enacted in 1900, was the first cooperative law in Asia and modeled after the German legislation (Kurimoto, 2004).

It is important to note that, different from the European practices, which were primarily self-governing institutions, cooperatives in most Asian countries emerged as state-run initiatives. In countries that experienced European colonization, there were interventions not only by local governments but also by the colonizers. On the one hand, national governments that were then in trouble sent state representatives to Western countries to search for a way to save the nation. On the other hand, colonial governments used cooperatives as a means either to facilitate their administration (as demonstrated above in the Indian case) or to exploit local resources and connect them to the colonial economy. The latter happened, for example, in South Korea and Indonesia (Hatta, 1957; Jung and Rösner, 2012), resulting in a distrust of cooperatives by local people. After independence, cooperatives in many Asian countries remained as state-sponsored institutions. National governments in several Asian countries intervened, particularly in agricultural cooperatives, and regarded them as economic and political instruments for the reconstruction of the national economy. For example, after South Korea's independence from Japan in 1945, agricultural cooperatives were allowed to take over previously established facilities and organizations. The National Agricultural Cooperative Federation was established in 1961 to establish inter-sectoral development linkages between small farm households and national markets, as Korean farmers generally did not have the will or the means to develop a cooperative system (Burmeister, 2006). See Chapter 12 by Akira Kurimoto for an extended discussion.

In Myanmar, in the period of the centrally planned economic system from the 1960s to the 1980s, cooperatives developed a negative image owing to centralized control and operational inefficiencies.⁴ In Indonesia, government promotion for co-operation has been channeled through *Djawatan Kooperasi* (Co-operative Service), a department of the Ministry of Economic Affairs. Its principal target was to prepare a suitable climate for cooperative development, including restoration of the people's confidence in them (Hatta, 1957).

Since the founding of the People's Republic of China in 1949, building a cooperative-based economy was set out as the direction for the development of the rural organization system, evolving from temporary mutual aid groups to primary agricultural production cooperatives and further to advanced agricultural production co-operatives (Shi et al., 1959). With the emergence of the rural commune system, the central government has modified the guidelines of agricultural cooperativization, resulting in mixed impacts on most Chinese peasants' lives. See Chapter 11 by Al-Assam and Sim for a more extensive discussion on Chinese cooperatives.

Despite governmental dominance, local societies throughout Asia also played a significant role in promoting cooperative practices, involving both individuals and social movements. On the one hand, intellectuals and social reformers from Western countries came to form cooperatives with the purposes of social progress and economic enhancement. Examples are numerous, be it in China (Trescott, 2007), India (Madan, 1994), or Indonesia (Hatta, 1957). On the other hand, grassroots movements in some countries (such as charities and NGOs), together with international NGOs, promoted cooperative development. Examples include the church-sponsored China International Famine Relief Commission that was founded in 1921 and the Young Men's Christian Association (YMCA), which led agricultural cooperative movements in China, India, and South Korea. Particularly in South Korea, YMCA, together with other rural movements, endeavored to construct a Danish-style cooperative system (Park, 2014), as Denmark was then believed to be a modern agrarian nation-state.

2.4 *The African context*

The European cooperative models were imported into Africa with different objectives than in the colonizing countries themselves (Wanyama et al., 2008). In the UK and the other European countries where the cooperative model was taking root, it was intended to emancipate and organize labor and other underprivileged sections of society to fight against exploitation. In Africa, however, it served to advance the interests of settlers as a system to organize resources for white farmers and slave masters who would then use free labor to produce fresh crops to send back to Europe and the west (Nembhard, 2018). It was not until after the independence era of the 1960s that cooperatives were transformed to become enterprises that would focus on rebuilding societies that were destroyed by colonial settlers and their withdrawal of investment from various African countries (Sultana, 2022).

The emergence of the modern cooperative in Africa was not peaceful but contributed to land invasions, plundering of natural resources, and benefiting the few (see Strickland, 1934). For example, in South Africa the English and then later the apartheid state focused on organizing white farmers into modern cooperatives to produce dairy, fresh produce, grain, and meat using cheap and even free labor (Strickland, 1934). Membership was not open but exclusive along racial lines. In Kenya, the colonizers benefitted from tea farming via the cooperative model that also exploited cheap labor, like Zambia's copper mining (Galabuzi, 2017).

The early introduction of the modern cooperative model by colonizers did not seek to merge with indigenous forms of cooperation, which, based on indigenous philosophies, were spread throughout Africa. These philosophies guided community building and the morals of people and ideas of community building. The first philosophy that has gained global recognition is Ubuntu (Wanyama et al., 2008). This philosophy recognizes mutual relationships among people in a family and society and is practiced through a show of kindness to others, especially those less fortunate, by seeking the good for the many and realizing at all levels that we are because each person is.

While the concept is well accepted in Africa and recognized elsewhere, Molefe (2023) warns that Ubuntu as a concept is often deadlocked in academic debates with very little discussion of how it is a way of life. In cooperative research, again Molefe (2025) cautions of the historical inertia that is evident in how Ubuntu can be perceived as legitimizing the American-Eurocentric definition of cooperatives, whereas, as already stated, the modern cooperative was a vehicle for cheap labor in days of colonial rule. Therefore, Ubuntu is a step closer to transforming the historic legacy of cooperatives on the continent and to advancing a truly African cooperative identity, one that does not exploit communities nor evict them from the lands, as it would have been in the days of English tea plantation cooperatives in Kenya (Zezeza, 1990).

uShirika echoes the philosophy of Ubuntu. The concept and philosophy of uShirika is common in East Africa in the kiSwahili-speaking communities (Ramagoshi, 2013). This philosophy emphasizes partnerships and seeking collective good for all. This philosophy is about putting communities before individual interests. For example, this philosophy suggests that partnerships must be pursued for the greater good. In Kenya and Tanzania this approach recognizes that there must be partnerships in the interest of cooperating. In the west, in Nigeria and Sierra Leone, cooperative societies such as Ajo and Osusu were established for solidarized support in the production and marketing of goods and financial empowerment (Conteh, 1995; Esiobu et al., 2015).

Unlike the traditional philosophies of Ubuntu and uShirika, Ujamaa was Julius Nyerere's philosophy and an ideology promoting the importance of communal living and familyhood (Kibona and Woldegiorgis, 2023). The practice of Ujamaa expanded beyond Tanzania to many parts of Africa, where local cultures have a strong sense of familyhood and rely on the sharing of labor to build communities. For example, in African funerals, men usually help dig the grave and fill it back up after the burial (Ramagoshi, 2013). This has since expanded into organizing cooperatives as forms of practicing Ujamaa (Hydén, 1980).

Research on cooperatives cites challenges in cooperative movement building. In Africa, while most governments have recognized the role of cooperatives in social and economic development, only a few have an integrated and autonomous cooperative movement (Pollet, 2009). This means that some countries are facing problems in movement-building while others are thriving. This raises issues about structure and agency. According to Johnson (2008), structure refers to rules applied and the context, while agency focuses on those intentional activities, the power, and

the degree of autonomy of what can be practiced within a given context. Movement building in Africa enjoys some structural and agentic force from below in various countries on the continent (Okem and Stanton, 2016). The introduction of the Cooperative Model Law that seeks to harmonize the cooperative movement on the continent is another example of structural and agency practice (Fici et al., 2013).

The dawn of independence in the 1960s presented grounds for the reconfiguration of the English Rochdale cooperative model to be utilized in Tanzania, Kenya, Uganda, and in many other countries. While there were models such as *ilima/letsema* (working together in African communities to plant crops and working for the good of all), these traditional models did not enjoy legal recognition and promotion (Ramagoshi, 2013). Therefore, the policies of the states that gained independence in the 1960s sought to transform the cooperative model and use it to transfer regained land, properties, and resources. Too much hope was placed on the cooperative form during this era, such as in the Arusha Declaration that committed to the creation of agricultural cooperatives in Tanzania (Brittannica, 2024). Kwame Nkrumah added his voice on cooperatives, stating that the model would provide better economic yields for rubber and cocoa farmers in Ghana (Lambert, 2017). These references to the cooperatives and independence in Africa show that the cooperative enterprise has been a great part of the liberation journey. The Cooperative Model Law confirms the work being done on the continent to realize the ideal of a cooperative society. See Chapter 10 by Onayemi et al. and 29 by Akinwalere & Chang for a broader discussion on cooperation in the African context.

2.5 *The Latin American context*

In Latin America, cooperativism has deep roots, is present in all countries, and evolves with the unique imprints of each culture and particular context, alternating between moments of crisis and boom, making it difficult to provide a general synthesis for the region. Despite this, various studies show that cooperatives have a significant weight in different economic activities (agriculture, livestock, financial services, housing, labor, consumption, health, etc.), and their contributions over more than a century to the economic and social development of their members and the communities where they are established are recognized (Coque, 2002; Mora, 2012; Martí, 2014; ICA Americas, 2024).

Indigenous cultures in Latin America precede the formal history of cooperativism, as cooperation and mutual aid were at the heart of their economies. Communities organized collective efforts—such as harvest work, road construction, and the building of bridges and aqueducts—through practices like “*minga*” and “*convite*,” traditions still practiced in some communities. They combined shared work with collective ownership and social welfare systems based on solidarity (Coque, 2002). Equally relevant is the legacy of African ancestors who, after escaping slavery, settled in jungle regions and established strong communal bonds and cooperative practices (Arango, 2004). The international cooperative model was introduced in the mid-19th century by waves of European immigrants who settled in Argentina, Uruguay, Chile, and southern Brazil, creating cooperatives in rural

and urban settings. Some pioneering experiences were also identified in Mexico, Venezuela, and Colombia, even with founding dates prior to the Rochdale cooperative (Arango, 2004).

In rural areas, cooperatives focused on consumption, following the Rochdale model, and finance, with the Raiffeisen and Luzzati models mentioned before, while in urban settings, cooperatives were linked to labor movements and had a sociopolitical dimension (Martí, 2014). The cooperative movement in Latin America responded to various ideologies, including the classical Rochdale principles, indigenous cooperative traditions, and revolutionary movements that viewed cooperatives as tools for class struggle and social change (Cracogna, 2009).

The 20th century marked a significant expansion of the cooperative movement. Influences included the Catholic Church, which promoted cooperatives to address social inequality, and governments, which used cooperatives to implement public services, land reforms, and social programs. Starting in 1925, the first specific laws dealing with cooperatives emerged in Chile, Argentina (1926), Colombia (1931), Brazil (1932), Ecuador (1937), and Mexico (1938), which served as the basis for other countries and the creation of the first federations (Martí, 2014).

From the 1950s and especially during the 1960s, the movement expanded significantly. During this period, the US supported various social organizations and economic development initiatives in Latin America through the Alliance for Progress, including several agrarian reforms that led governments to allocate collective or individual land, giving rise to different forms of rural cooperatives. However, many cooperatives failed due to a lack of community involvement and training, while the most endogenous cooperative models, such as those inspired by indigenous traditions or early European immigrants, were overshadowed (Coque, 2002).

On the other hand, initiatives promoted by the Catholic Church and labor unions during the same period were strengthened, in some cases with the support of international multilateral agencies like the International Labour Organization (ILO) and the Organization of American States (Fajardo, 2003).

During the 1970s and 1980s, governments fluctuated between authoritarian regimes that repressed popular movements, including cooperatives, and, at times, used cooperatives to control these movements by fostering their dependence on state support (Arango, 2004; Coque, 2002). On the other hand, the neoliberal economic policies of the 1980s weakened the cooperative movement, as governments moved away from supporting social programs and placed greater emphasis on free market principles. However, from the 1990s to the present, the emergence of a cooperative movement can be observed, which, along with other expressions of the social and solidarity economy, becomes an alternative for sustainable development, particularly in the context of economic crises and social exclusion (Martí, 2014; ICA Américas, 2024). For example, in countries like Chile and Argentina, cooperatives played a vital role in organizing marginalized communities, offering solutions for unemployment and poverty through grassroots initiatives. In Colombia, their contribution to peacebuilding in the territories is highlighted (Mora, 2012; Pérez et al., 2022).

3 The contemporary cooperative movement

As can be seen from the previous section, the global cooperative movement spread around the world in various ways. It can be seen as a colonial project emanating from Europe, which means that there is a degree of consistency in form, but at the same time, the encounter with different cultures and societies, including different social, economic, and political environments, means that there is also considerable diversity. In this section, we discuss two perspectives on the contemporary cooperative movement. First, the “unified” or mainstream cooperative movement that is anchored by the ICA, and then some of the more transformative orientations and efforts that are being undertaken around the world.

3.1 *The ICA “unified” global cooperative movement*

The first thing to note about the global cooperative movement is its size: the ICA claims that over a billion people worldwide are members of some 3 million cooperatives spread over 100 countries (ICA). Cooperatives are deeply embedded in capitalist economies, and the overriding concern for most cooperatives is economic survival, which requires doing things that most businesses take for granted: gain and retain customers, ensure profitability, and maintain or even grow as businesses in a competitive marketplace. What this means may vary considerably, depending on the type of cooperative and the local circumstances in which it operates, but the primary concern of most cooperatives, like for most businesses, is survival. The ICA maintains a set of principles—the Cooperative Principles—that all cooperatives are expected to adhere to, maintaining a basic level of unity in terms of values and identity for all cooperatives. The degree to which cooperatives actually adhere to these principles, however, varies, as it is widely understood that just three of the principles (voluntary and open membership, democratic control, and member economic participation) are considered essential, while the other principles (such as autonomy and independence, education and training, cooperation among cooperatives, and concern for community) are considered to be more aspirational (Oczkowski et al., 2013).

Despite the overall size and extent of the cooperative movement, the need for cooperatives to survive under conditions of global capitalism presents some challenges. The problem of degeneration is a common topic in the literature on cooperative management. Growth can mean professionalization, which contributes to an increase in the power of managers, which can contribute to the degeneration of democratic practices and values and, ultimately, demutualization as the cooperative disbands and becomes a traditional capitalist company (e.g., Battilani and Schröter, 2012). Nonetheless, the mainstream cooperative movement demonstrates tremendous strength all around the world. In what follows, we briefly discuss the current size and extent of cooperatives around the globe.

UK, US, and Canada: Despite their reputation as rabidly capitalistic countries, the cooperative movement is both deeply rooted and very extensive in the UK and its former American colonies. The US has one of the largest cooperative sectors in the

world, with about one-third of all Americans⁵ holding membership in one or more of about 30,000 cooperatives generating over \$600 billion in revenue (Perryman, 2022). It would be difficult to refer to cooperatives in the US as a “movement,” however. The various sectors operate largely separately from one another, and there is not a great deal of coordination. The National Cooperative Business Association (NCBA) is the national apex organization, but few of the 30,000 cooperatives nationally are members (NCBA). Several other associations serve specific cooperative sectors such as agricultural producers, workers, and credit unions.

In the UK, by contrast, the cooperative sector is much more concentrated. The nearly 7,500 cooperatives claim about 15 million members, around 20% of the population.⁶ Five million of these belong to The Co-operative Group, which operates in all sectors of the economy and traces its roots to Rochdale and the CWS. Significantly, in 2024 the Labour government pledged to “double the size of the co-operative and mutual economy,” indicating significant support for the development of public policy supportive of cooperative growth and development (Co-operatives UK, 2024).

In Canada, agrarian cooperatives dominate their sectors, particularly in grain and dairy. Consumer cooperatives are widespread on the Atlantic coast and in the heartland, although in much of the country they are primarily found in rural areas (CMC, 2024). The cooperative movement is especially strong in Quebec. Some 45% of all Canadian cooperatives are based in Quebec, where an enabling environment has helped to promote a solidaristic movement that has been manifested, in part, in cooperatives (Birchall, 1997; Macpherson, 2015; CMC, 2024). This includes the massive credit union group, *Mouvement des Caisses Desjardins*, holding some 42% of all savings deposits in the province (Morningstar, 2022).

Europe: Cooperatives Europe, “the voice of the cooperative movement in Europe,” states that 1 out of 5 people in the EU is a member of a cooperative. In many European countries the cooperative sector has become an important, even dominant, player in certain sectors such as housing or agricultural marketing. Even after the 2008 financial crisis, in many European countries cooperative banks are still very present and are, more than the other commercial banks, oriented toward the financing of the local real economy (Venanzi and Matterici, 2022). The transformative capacity of certain cooperative initiatives has reached almost mythological proportions. This is the case, for example, of the network of cooperatives in the Spanish Basque region of Mondragon, where an integrated group of cooperatives in banking, retail, industry, and even education has become the most powerful regional changemaker and even a prominent global cooperative conglomerate (Azkarraga and Cheney, 2019). Reference should also be made to the Italian cooperative movement, which is—together with Kenya and the small Caribbean island of Dominica—one of the largest and most deeply rooted movements in terms of number of cooperatives, cooperative membership, and share of the national economy (Ammirato, 2018). Some of the European cooperative sectors have also become very impactful lobby groups at European level. The most vocal and visible is without doubt Cogeca, the confederation of European agricultural cooperatives (Bijman and Iliopoulos, 2014).

Asia: The first regional office of the International Co-operative Alliance (ICA) was established in Asia, which became a model for other regional offices set up later in Africa, Latin America, and Europe.⁷ Nowadays, formal cooperative structures are prevalent in many Asian countries. Based upon the ICA standards, some Asian countries also established national cooperative alliances as umbrella organizations that are members of the ICA. Numerous Asian countries have passed or modified cooperative laws/acts to institutionalize the ICA model.

Since many countries in Asia have a large proportion of agricultural land, the cooperative movement in many of them has been led by agricultural cooperatives. This is not only evident in developing countries in Southeast Asia but also in highly industrialized societies (e.g., Japan, South Korea, and New Zealand). In China, the cooperative sector has been developing into probably the largest one in the world. Although the rural population has been declining in absolute terms, agricultural cooperatives remain the only institutionalized cooperative type in the country, being regulated by the Law on Farmers' Specialized Cooperatives. In Asia, besides in the agricultural sector, cooperatives are also active in a diversity of other economic sectors, such as industry and utilities (e.g., Japan, South Korea, and India), insurance and financial services (e.g., Japan, South Korea, and Malaysia), as well as the healthcare and pharmaceutical industries (e.g., Australia, New Zealand, and Japan), just to name a few.⁸

Africa: Cooperatives in Africa contribute to the livelihoods of millions of people. Although the movement draws much of its history from a violent and exploitative colonial past, it has since redeemed itself by providing sustainable incomes and opportunities for previously oppressed groups (Wanyama, 2012). Cash crops, fisheries, and dairy remain the top cooperative sectors on the continent. Furthermore, the wider agricultural activity continues to be coordinated via cooperatives. This includes the supply of fertilizer, agricultural implements, and infrastructure. Cooperatives in Africa have contributed greatly to the flow of money and to improving access to credit. The savings and credit cooperatives play an exemplary role in financing housing, agriculture, education, and the cooperative sector more broadly in Africa, where access to traditional bank finance remains stringent (Nassuna et al., 2024).

Latin America: In the 21st century, the cooperative movement has continued to grow, driven by a renewed focus on social inclusion, sustainable development, and solidarity. "Cooperatives of the Americas" is the regional representation of the ICA for Latin America. It was founded in 1990 in Costa Rica with the aim of promoting the repositioning of the cooperative model in a context that demands innovation, dissemination, education, defense of identity, and networking. One of its most significant achievements was in 2008, when it updated the Framework Law Project for Cooperatives in Latin America, which has influenced regulations across the region and beyond (Cracogna, 2009).

In recent years, the organization has played an important leadership role by participating in debates that led to resolutions such as those proposed by the United Nations to promote the social and solidarity economy (2023), considered by governments around the world. Its priority issues include fostering cooperative

integration, education, influencing public policy management, promoting equitable participation of youth and women, and using the territory as a reference for action in favor of sustainable development (ICA Americas, 2024).

3.2 *Alternative directions and contemporary debates*

The cooperative movement described above, centered as it is on the ICA, represents the mainstream of the movement. However, there are elements around the world that go beyond this in their efforts to transform local societies by emphasizing not only economic but also social and ecological values and concerns. These cooperatives are engaged in the social economy, transforming the ways in which social services are delivered; in the solidarity economy, which is involved in broad social transformation especially focused on lifting up disadvantaged communities and creating greater linkages with the non-human world; in advancing sustainability efforts, particularly associated with the UN's Sustainable Development Goals (SDGs); and with economic transformation associated with the gig economy.⁹ This section will briefly look at what these elements look like around the world.

In the US, the major challenge in advancing a more transformative agenda is the large and fragmented nature of the movement. Nonetheless, cooperatives represent many of the most progressive elements of the economy. This can particularly be seen in cooperative grocery stores (NCG, 2024). Worker-owned cooperatives, led by the US Federation of Worker Cooperatives, place strong emphasis on social transformation and solidarity (USFWC, 2024). In addition, local organizers in particular cities have been working to help create networks of solidarity among cooperatives and community-based organizations (Safri et al., 2025). There has also been a push—in the US and elsewhere—to transform the gig economy by establishing platform cooperatives (Scholz, 2023; Srncic and Guttman, 2025).

Cooperatives in the UK have similarly been at the forefront of important developments in the retail sector, for example, in the introduction of fair-trade practices (Co-operative Group, 2024). Unlike what is often seen in the US, for example, UK cooperatives do not shy away from celebrating their democratic and solidaristic character (Co-operatives UK, 2024). In Canada, *Le Chantier de l'Économie Sociale et Solidaire* leads the way in Quebec in efforts to establish a more solidaristic, networked economy centered around cooperatives and other small enterprises (Wright, 2020).

The European cooperative landscape has undergone profound mutations over the past 20 years. First, the movement was challenged by the demutualization of big cooperative conglomerates. Other traditional cooperatives sharpened their cooperative profile. This was stimulated by the emergence of a new wave of innovative cooperatives that looked for more genuine cooperative practices. For example, electricity cooperatives and new housing cooperatives aligned themselves with other more experimental forms of collective action, such as energy communities and community land trusts (see also Chapter 3 by Warren/Narduzzo). This produced a twin effect. The cooperative movement itself became more visible and recognized. At the same time, in many places, cooperatives were invited to become

part of a broader social and solidarity economy movement. In some, they preferred to remain a closed cooperative sector. In other countries they were taking the lead in constructing this broad alliance with mutuals, associations, not-for-profit organizations, foundations, social enterprises, and so-called paritarian institutions. In many cases, established movements such as farmers' and workers' movements but also ecological, youth, and international solidarity organizations got involved, and many of them set up their own cooperatives as subsidiaries.

In several countries legal provisions for alternative cooperative arrangements were made, such as the participation of different types of members in the cooperatives, including local governmental agencies. This also led to the establishment of platforms of social and solidarity economy actors in which cooperatives became an important but not the only driving force. In 2000, the European Commission invited the sector to talk with one voice. This resulted in the creation of Social Economy Europe, representing European apex organizations (such as Cooperatives Europe) of the social economy, national social economy umbrella organizations, and European networks promoting the social economy.

In Asia, although the social and solidarity economy remains a relatively new concept, policy and academic debates and exchanges are vibrant, leading to social movement practices in diverse economic and social contexts. For example, in South Korea and Japan, the success of the social economy and social enterprise models in Europe came to the attention of academic and pioneering scholars, which has driven into prominent trends of collaborative synergies across sectors or the emergence of specific legal enactments (e.g., the 2006 Law for the Promotion of Social Enterprise in Korea). In most Asian countries, however, alternative practices mostly operate either under the nonprofit or the cooperative legal forms (Bidet and Defourny, 2019). In the process of growing and diversifying the cooperative sector, alternative directions of contemporary cooperation are demonstrated, for instance, in the form of ecological movements such as the Hansalim movement in South Korea or collectivism in the gig and platform economy in India, which have functioned as important means to empower peasants, consumers, or workers.

Moreover, in some Asian countries, multifunctional cooperative models are emphasized, such as village cooperatives in South Korea (Jung and Rösner, 2012), community-oriented rural social enterprises in Japan (Makino and Kitajima, 2019), and village collective-based cooperatives in China (Zhao, 2022). Although they vary by country, one common feature of these multifunctional cooperative models is their emphasis on community embeddedness and provision of multiple services.

In China, a new and innovative conceptualization of cooperativism has emerged called the shareholding co-operative system (SHCS). The SHCS first created a new organizational ownership form and governance model in rural collective enterprises. It has also been used in community cooperatives and land cooperatives, as well as by farmers' specialized cooperatives, which gained legal recognition in 2007. SHCS is a form of multi-stakeholder co-operation (Clegg, 1998), involving collaboration between local governments, collective enterprises, and community residents (Christiansen and Zhang, 1998). Their emergence involved intense and prolonged debates on the nature of Chinese cooperatives, which have been

operating in a way that is different from the ICA model. This difference particularly lies in the fact that in the SHCS, members can bring in shares and labor to voluntarily form an enterprise with social aims, combining the principles “one member one vote” and “one share one vote” in decision-making (Zhao and Develtere, 2010; Zhao, 2012). Given significant institutional and social changes that happened recently in China, the multi-stakeholder cooperation model based on the organizational architecture of SHCS has become the dominant variant because of how it fits the reality of the Chinese rural economy (Zhao and Yuan, 2014; Zhao, 2017).

The cooperative movement in Africa can be expected to have a strong future because, given that its population is, on average, 19 years old (Onyeiwu, 2024), it will continue to benefit from having a youthful membership. Like the global cooperative movement, the African movement will be confronted by climate change and fast-changing technology. A recent study of 20 African countries shows that the cooperative movement has experienced growth due to an enabling environment that has been created (<https://icaafrica.coop/en/newsroom/news/coopstar-empowering-african-cooperative-movement-key-player-transition-towards>). For example, enabling policies and ongoing recognition of the role of cooperatives in different countries on the continent are some reasons for the continued growth among credit and agriculture cooperatives and the emergence of new forms of cooperatives in Africa. The study also shows that the cooperative movement in Africa is being pushed forward by a younger and more female leadership and member base that expresses a desire for more professionalism and social innovation.

Today, Latin American cooperatives are integral to the region’s economic and social landscape, playing a crucial role in addressing challenges such as poverty, inequality, and environmental sustainability. The cooperative model continues to be seen as a viable and transformative approach, offering an alternative to traditional capitalist structures. Working with governments and universities, cooperatives are developing agendas to ensure innovative and relevant business models with potential for internationalization. Although there is an extensive regulatory framework, there is also fragmentation and limitations in access to markets and financing.

In this context, strengthening influence in Latin American public policy management is a priority, as well as establishing an educational system that fosters a culture of solidarity, activates citizenship, promotes social innovation, and encourages solidarity entrepreneurship to create new cooperatives in different sectors. Aligning with the green and digital transitions is also essential to enhancing their social, economic, and environmental impact. In all of this, integration and generational connection will be the best formula for success.

4 Conclusion

If one point clearly comes across from this brief global sketch of the cooperative movement, it is that it is a broad and diverse movement. With diverse histories, taking diverse forms in diverse cultures, it is hard to sustain the view that “real” cooperatives only come in one shape (e.g., Ellerman and Gonza, 2025). We think

that it is more valuable to recognize this diversity in order to engage with it not only to help ensure that the cooperative movement is strong but also to ensure that cooperatives are able to fulfill their most basic and important function: to make people's lives better.

The broad outlines of the cooperative movement laid out here show that there are many streams that lead in different directions. There is an “old guard” of the mainstream that is rooted in 19th-century economic models that are premised on the largely autonomous firm controlled by those who invest in and benefit from it (principally co-op members). On the other hand, there is the more recent development—which in important ways harkens back to the origins of the movement itself—of cooperatives that recognize themselves as agents of social transformation, deeply embedded in their communities and oriented toward addressing local and global problems that involve solidarity, community building and strengthening, and ecological and social sustainability (see also Micken et al., 2025).

If we recognize these two main streams of the cooperative movement, we can also see tensions between them. As mentioned earlier, cooperatives are businesses that, in most cases, exist in capitalist economies where they must compete for market share in order to survive. The problem of degeneration is real—the idealism of the founders fades in the face of the challenges of operating in the real world, and managerialism and professionalization lead to a more conservative outlook (Bretos et al., 2020). At the same time, the more transformative cooperatives challenge some of the premises that the mainstream (and dominant) part of the movement considers fundamental. For example, the principle of autonomy is written into the ICA's Statement of Cooperative Identity, but there are increasing numbers of cooperatives being formed by nonprofit organizations and NGOs as a model for economic development that are, in effect, subsidiaries of those organizations.

This is part of the process of creation, diffusion, and convergence discussed above. As the history reflects, the cooperative movement around the world has gone through various cycles of this process. The newer cooperatives that are more deeply concerned with social transformation represent a new creative approach to addressing a new set of issues. Strengthening these cooperatives means the invention of new organizational forms that are able to provide the kind of support needed to achieve some of the non-financial goals they set out for themselves. So, we see increasing development of networks organized as second-order cooperatives, and we see multistakeholder cooperatives and cooperatives that are formed within supportive organizations that can take advantage of synergies and resources that might not be available to a more mainstream, traditional cooperative.

We are encouraged to see the new developments, which in important ways reflect a return to the origins of the cooperative movement in seeking to transform communities to make them more just, more sustainable, and more interconnected. We also recognize three key challenges. The first is the need to involve young people in building community capacity, networks, and connections to build toward the future. The second concerns the cooperative principle of “cooperation among cooperatives.” If cooperatives want to be a transformative economic and social movement, they must collaborate with each other more than ever before and opt

for cooperative and collective action. The other is for cooperatives to become more open to working with community-based organizations that share the goals of the movement. This includes social and solidarity economy organizations, as well as organizations working on environmental, social, and economic sustainability. In this way, cooperatives can introduce more people to the benefits of cooperation and expand the ways that cooperatives can impact their communities to produce a more just, more sustainable economy for all.

Notes

- 1 The breadth of scope and constraints of space for the chapter mean that the best we can offer is a brief sketch to draw a rough picture of the movement around the world. Each contributor has taken a somewhat different approach, but the point of each section is to give the reader a sense of conditions in their part of the world. Later chapters in this volume will explore some of these regions more deeply.
- 2 Benjamin Franklin is recognized as having organized the first consumer cooperative, a mutual insurance company (which is still functioning), in Philadelphia in 1752.
- 3 <https://www.co-operative.coop/who-we-are>
- 4 <https://icaap.coop/sites/ica-ap.coop/files/2020%20Myanmar%20Country%20Snapshot.pdf>.
- 5 This is an estimate based on the fact that US cooperatives have a total of about 350 million members (NCBA 2024), and people often belong to more than one cooperative.
- 6 Because many of these may be family or household memberships, the number could encompass a far larger percentage of the population.
- 7 <https://www.icaap.coop/aboutus-ica-asia-pacific>.
- 8 See the brief introduction of cooperative development in respective countries from the ICA-AP website cited above.
- 9 It should be noted that the ICA incorporates and even seeks to encourage these transformational approaches. For example, significant resources have been put into advancing the UN SDGs (Kaswan, 2024).

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