

COOPERATIVE ECONOMICS RESEARCH GUIDE



Introduction

Here at the Blum Center, The Dr. U.S. Awasthi Initiative in Cooperative Economics supports UCSB faculty and student research centered on the principles, practices, and prospects for cooperative enterprise in California, the U.S., and worldwide.

Cooperative economics exist all around us in the form of food co-ops, credit unions, housing cooperatives, employee stock ownership plans, mutual aid networks, community land trusts, electricity cooperatives, and more! Cooperative economics is present whenever members of a community take action to meet material and social needs that are unmet by markets. The most common type of this communal action is the formation of a cooperative enterprise. It is usually a business organization that is owned and democratically controlled by its workers or members who use its services. Cooperative enterprises provide affordable goods and services when markets price them out of reach, or even fail to provide them at all. Cooperative businesses also facilitate a more equitable distribution of resources or income by prioritizing the interests and values of their member-owners over the maximization of profits. Cooperatives, also known as “co-ops” can appear in many forms depending on ownership structure.¹

This research guide is designed to help you understand what cooperative economics is and why it is incredibly important for providing resources in an economy littered with market failures and a nation plagued by growing inequality. In addition to guiding you through various cooperative economics examples and the existing state of the research literature, this handout contains clear questions and ideas for needed student research

¹ As opposed to the US, in the UK and elsewhere abroad, cooperatives are referred to with the spelling “co-operatives.” As such, both spellings are used interchangeably throughout this guide.

projects. We welcome and invite you to explore your own interests through a cooperative economics lens.

Organization of Sections²

1. **Defining Cooperative Economics:** provides an outline of the primary ways that scholars and cooperative groups have defined cooperative activity. Pgs. 2-4
2. **Cooperative Economics Categories & Examples:** includes prominent examples of cooperatives operating today that you can investigate further. Pgs. 5-8
3. **Potential Research Questions:** there are many ways to create a research project in cooperative economics. This section provides question to help inspire your own inquiry. Pgs. 8-9
4. **Timeline of Important Events in Cooperative History:** historical context and past development of the cooperative movement. Pgs. 9-13
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6. **Academic Sources:** a range of beginner and more advanced peer-reviewed sources you can use to support your research. You will find the beginner sources highlighted in bold. Pgs. 14-22
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Defining Cooperative Economics

A cooperative or co-op is an organization and/or business that is owned by stakeholders who are *not* investors, a single individual, or a family.³ This means that a cooperative is owned and democratically operated by its members and/or workers who use its services or produce its goods.⁴ Co-op members own their co-op through

² This guide primarily provides an overview of traditional cooperative organizations, although there are also useful citations here addressing the broader spectrum of communal activity that also falls under the cooperative economics umbrella.

³ Jonathan Michie et. al., "Introduction and Overview" in *The Oxford Handbook of Mutual, Co-operative, and Co-Owned Business*, eds. Jonathan Michie et. al (Oxford: Oxford University Press, 2017,) xxiii.

⁴ For more expansive definitions see: Jessica Gordon Nembhard, *Collective Courage: A History of African American Cooperative Economic Thought and Practice* (College Station: Penn State University Press, 2014); Univeristy of Wisconsin Center for Cooperatives, "What is a Co-op?" <https://uwcc.wisc.edu/about-co-ops/>; International Cooperative Alliance, "Cooperative identity, values,

cooperative financing, makes decisions for their co-op using voting rights, and are the main beneficiaries of the goods their co-op provides or the revenue that it generates.

Cooperative organizations come into being when people organize voluntarily to meet their common goals and wants through a democratically controlled enterprise.⁵

Cooperatives are formed by their member-owners to either provide an economic and/or social need, an affordable quality good or service that the market does not provide, or to provide that good or service at a more affordable cost. Lastly, cooperatives create a more equitable distribution of funds and resources. Cooperatives are ideal for responding to instances of market failure⁶ when the economy cannot provide goods and services at an affordable rate for which cooperatives can compensate.

Since 1844, cooperatives have organized themselves around a shared set of cooperative principles codified by the Rochdale Society of Equitable Pioneers in England that serves as a unifying thread for the modern global cooperative movement. In 1937, the International Cooperative alliance introduced and formalized seven principles that determine global cooperative principles and values.⁷ As a whole, the principles emphasize the values of self-help, self-reliance, responsibility, equality, equity, and solidarity with other cooperatives.⁸ There are also different categories that cooperatives fall under. See below.

The Seven Core Cooperative Principles and Values⁹:

1. *Open and Voluntary Membership*

- Membership must be open to all persons interested in accepting the responsibilities of cooperative membership. Absolutely no discrimination

and principles," <https://www.ica.coop/en/cooperatives/cooperative-identity>; Democracy at Work Institute, "Worker Cooperative Definition," 2015, <https://www.usworker.coop/wp-content/uploads/2018/02/Worker-Cooperative-Definition-2015.pdf>

⁵ ICA, "Cooperative Identity, Values, and Principles."

⁶ Market failure is a concept in economics that refers to situations in which the operation of a given fair market fails to produce the most efficient allocation of resources.

⁷ Hagen Henry, "Co-operative Principles and Co-operative Law Across the Globe" in *The Oxford Handbook of Co-operative and Co-Owned Business*, eds. Jonathan Michie et. al (Oxford: Oxford University Press, 2017, 39). Does the page number go inside of the parenthesis? I've always put it outside, based on the Chicago guide I use:

https://www.chicagomanualofstyle.org/tools_citationguide/citation-guide-1.html

⁸ California Center for Cooperative Development, "What is a Co-op?"

⁹ ICA, "Cooperative Identity, Values and Principles."

based on race, gender, religion, economic class and circumstance, or any other identity category is permitted.

2. Democratic Member Control

- Organized on the principle of one member, one vote. If a board of directors or representatives make decisions for the membership, those agents must be elected by and accountable to the membership.

3. Member Economic Participation

- Members contribute to the shared capital of their cooperative in an equitable manner. Surpluses which would normally be identified as profit are instead allocated by members for the development of their cooperative enterprise, the establishment of capital reserves, or for supporting other agreed upon activities for the cooperative to undertake. When and where capital is used to benefit members, it is to be done in proportion to their transactions with the cooperative.

4. Autonomy and Independence

- Cooperatives are independent organizations controlled by their members. If co-ops enter into agreements with outside parties, it is only in a way that preserves their autonomy.

5. Education, Training, and Information

- Cooperatives value continuing education for their members to ensure they participate in and contribute to their cooperatives effectively. Cooperatives also educate the public to spread awareness of the benefits of cooperation.

6. Cooperation among Cooperatives

- To best serve their members and strengthen the international cooperative movement, cooperatives prioritize partnerships with other cooperatives and cooperative networks.

7. Concern for Community

- Cooperatives pursue sustainable development for the communities of which they are a part.

Primary Cooperative Categories¹⁰:

1. **Consumer Cooperatives:** owned by members to purchase needed goods or services.

Example: buying clubs, cooperative retail stores, credit unions, etc.

2. **Workers' Cooperatives:** any enterprise owned by its workers. The workers make operation and management decisions for their company and decide how to allocate capital.

Example: any worker-owned business, cooperative cab companies, worker-occupied factories, etc.

3. **Producer Cooperatives:** ownership is shared by members who produce similar types of goods and services. Producer cooperatives are effective for negotiating prices and enabling the goods and/or services to access larger markets.

Example: most agricultural cooperatives fall under this distinction.

4. **Purchasing or Shared Services Cooperatives:** Members are businesses or organizations, not individual consumers, or workers. Members work together to combine purchasing power and achieve better pricing, availability, and delivery of products or services.

Example: often formed by hospitals, independent retail stores, and educational institutions for cost-effective wholesale purchases.

5. **Multi-Stakeholder Cooperatives:** formed by collaboration between different classes of member. Members can be individual consumers, businesses, investors, workers, or producers and any combination of these groups.

Example: cooperative organizations that are formed to cover an entire supply chain. A food-oriented multi-stakeholder, for instance, cooperative might include growers, agricultural supply businesses, distributors, food processors, workers, and buyers to create a cooperative chain from farm to table.

¹⁰ These categories are borrowed from the classifications used by the University of Wisconsin's Center for Cooperatives. See: University of Wisconsin Center for Cooperatives, "What is a Co-op?" <https://www.ica.coop/en/cooperatives/cooperative-identity>

Cooperative Economic Examples & Important Cases

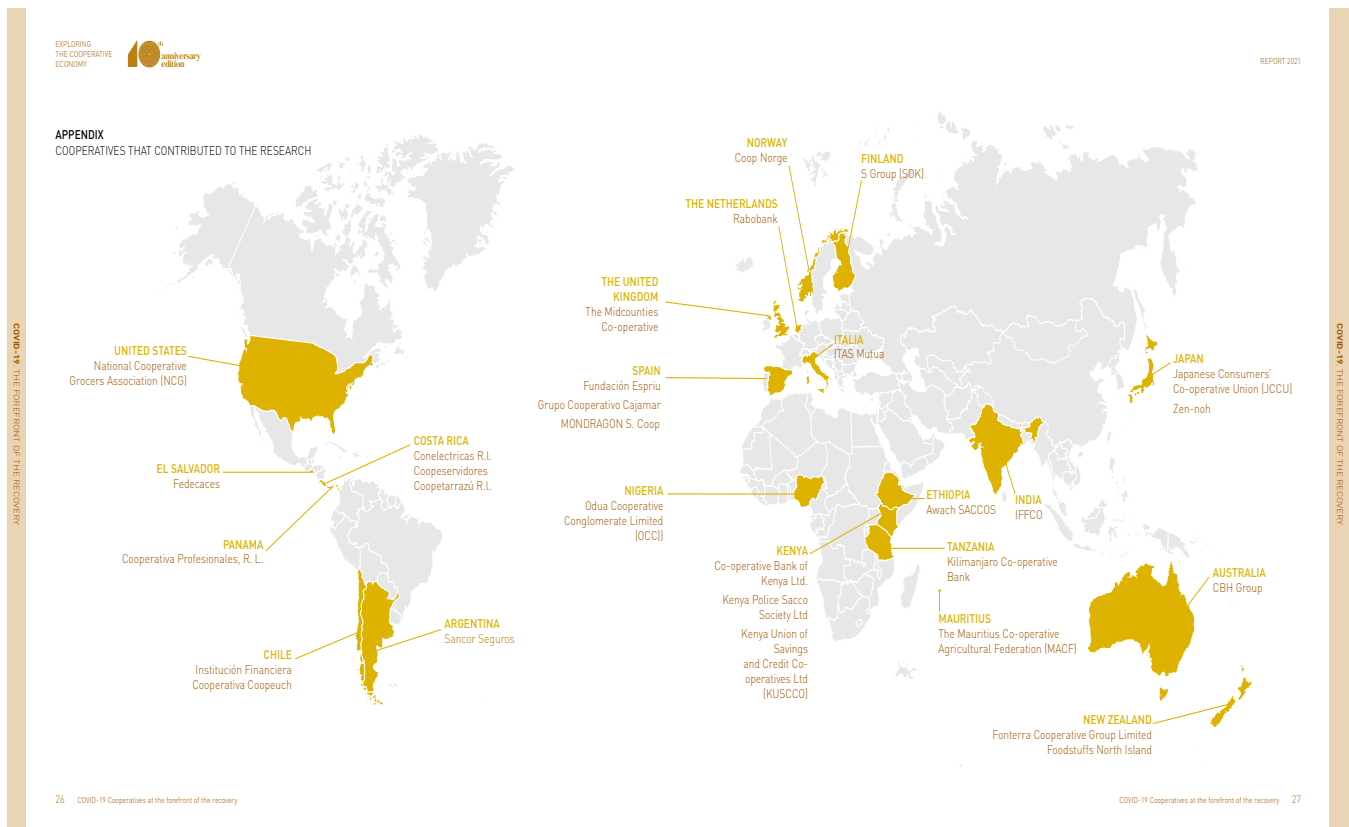


Figure 1, "2021 World Cooperative Monitor Report," International Cooperative Alliance, <https://monitor.coop/en>

Consumer Co-ops

- Recreational Equipment Inc. (REI), Washington, USA, <https://www.rei.com/>
- Golden 1 Credit Union, California, USA <https://www.golden1.com/>
- Adams-Columbia Electric Cooperative, Wisconsin, USA <https://www.acecwi.com/>
- Isla Vista Food Cooperative, California, USA <http://islavistafoodcoop.blogspot.com/>
- Santa Barbara Student Housing Cooperative, California, USA <https://www.sbcoop.org/>

- Federación Nacional de Cooperativas de Ahorro y Crédito de Ecuador (FECOAC), Ecuador, <https://fecoac.org/>
- Institución Financiera Cooperativa Coopeuch, Chile, <https://www.coopeuch.cl/>
- Sancor Seguros, Argentina, Uruguay, Brazil, and Paraguay, <https://www.sancorsegueros.com/en>
- Awach Saving and Credit Cooperative Society Limited, Ethiopia, <https://www.awachsacco.com/>

Worker Co-ops

- Union Cab Co-op, Wisconsin, USA <https://www.unioncab.com/>
- Isthmus Engineering and Manufacturing, Wisconsin, USA <https://isthmuseng.com/>
- Equal Exchange, Massachusetts, USA <https://equalexchange.coop/>
- Cooperative Care, Wisconsin, USA <http://www.cooperativecare.us/>
- North Wind Renewable Energy, Wisconsin, USA <https://www.northwindre.com/>
- Mondragon, Basque Country, Spain <https://www.mondragon-corporation.com/en/about-us/>
- Bobs Red Mill, Oregon, USA <https://www.bobsredmill.com/employee-owned>

Producer Co-ops

- Ocean Spray, Massachusetts, USA <https://www.oceanspray.com/>
- The Blueberry People, Michigan, USA <http://www.blueberries.com/about.php>
- Organic Valley, Wisconsin, USA <https://www.organicvalley.coop/>
- Q Artist Cooperative, Wisconsin, USA <https://qartistscooperative.com/>

- Alanya Fishers, Turkey

Purchasing/Shared Services Cooperatives

- Ace Hardware, Oak Brook, USA <https://www.acehardware.com/about-us>
- Carpet One, San Diego, USA <https://www.carpetone.com/about-carpet-one>
- Independent Pharmacy Cooperative, Wisconsin, USA <https://www.ipcrx.com/>
- Educational & Institutional Cooperative Services, New York, USA.
<https://www.eandi.org/>

Multi-Stakeholder Cooperatives

- Weaver Street Market, North Carolina, USA
<https://www.weaverstreetmarket.coop/>
- Fifth Season Cooperative, Wisconsin, USA <http://www.fifthseasoncoop.com/>
- Wisconsin Food Hub Cooperative, Wisconsin, USA <https://wifoodhub.com/>
- Fedecaces, El Salvador, <http://www.fedecaces.com/site/>
- Odua Cooperative Conglomerate Limited, Idaban, Nigeria,
<https://oduacooperativeconglomerate.coop/>
- Co-operative Bank of Kenya, Nairobi, Kenya, www.co-opbank.co.ke
- Cooperation Jackson, Jackson, Mississippi, <https://cooperationjackson.org/intro>

Agricultural Co-ops

- India Farmers Fertiliser Cooperative (IFFCO), New Delhi, India,
<https://www.iffco.in/en/corporate>
 - Often listed as the biggest co-op in the world

- Mauritius Cooperative Agricultural Federation, Port Louis, Mauritius, <https://mcafcoop.com/>
- Federation of Southern Cooperatives/Land Assistance fund, Georgia, USA, <https://www.federation.coop/>
 - Considered the only extant African American Cooperative in the US¹¹ (17)

Historical African American Mutual Aid Societies

- Major 19th Century Examples¹²
 - Independent Order of Saint Luke (Maryland and Virginia),
 - National Ex-Slave Relief, Bounty and Pension Association (Tennessee), founded by African American Women,
 - Free African Society (Pennsylvania)

Potential Research Questions

- Historical tension between the scale and democratic values of a cooperative. Can cooperatives grow while also remaining democratic and responsive to member needs?
- What does economic solidarity look like in practice? What are the best methods for democratic decision making in cooperative groups? How does democracy work in harmony (or not) with other values like autonomy, consensus, and building economic power?
- Under what conditions are people most likely to cooperate to meet common goals? What can be done to foster those conditions?
- What can specific cases of cooperation in action tell us about the wider cooperative movement? How can looking at one specific community land trust, credit union, cooperative grocery store, etc.. help to illuminate larger trends in cooperative economics?
- How does cooperative economics work within an intersectional framework? In other words, how do overlapping layers of race, gender, class work to foster

¹¹ Nembhard, *Collective Courage*, 17.

¹² Nembhard, *Collective Courage*, 21.

different forms of cooperation in different contexts? What can communal practices of marginalized communities tell us about the potential of economic cooperation as a path to empowerment, liberation, and justice?

Timeline of Important Events in Cooperative History¹³

- 2012 United Nations International Year of Cooperatives
- Declared in 2012 by the United Nations, the ICA and UN jointly declare the next ten years to be the international decade of cooperatives.
- 2005 United Nations International Year of Micro-Credit
- 2004 US Federation of Worker Cooperatives formed in Minneapolis
- 2001 *Horizontalidad* and *Autogestión* movements grow in Argentina in wake of IMF-imposed austerity programs
- 1995 ICA adopts most recent iteration of cooperative identity and principles statement
- At the 1995 ICA conference, attendees added the seventh principle on “Concern for Community” to the cooperative identity program.
- 1993 Cooperativa ARIGOS is formed by three prisoners in Puerto Rico
- In response, the governor amends applicable law to account for prison cooperatives, allowing for the growth of more prisoner cooperatives in Puerto Rico.¹⁴
- 1978 National Cooperative Bank established in US through an act of Congress
- 1967 Federation of Southern Cooperatives Established
- 1967 Indian Farmers Fertiliser Cooperative (IFFCO) formed as a multi-unit cooperative society

¹³ Much of the literature on the history of cooperatives and cooperative economics focuses heavily on growth of cooperative model out of European experiments. As such, this timeline is somewhat biased towards the US and Europe.

¹⁴ Bobby Sullivan, *Revolutionary Threads: Rastafari, Social Justice, and Cooperative Economics* (New York: Akashic Books, 2018,) 150.

- 1964 Kenya National Federation of Cooperatives (KNFC) formed, exists today at the Cooperative Alliance of Kenya
- 1956 The Mondragon Cooperative Corporation is founded the Basque Country of Spain
- 1946 North American Students of Cooperation (NASCO) formed under the initial name North American Student Cooperative League
- 1938 Recreational Equipment, Inc. (REI) formed in Seattle first as the Recreation Equipment Cooperative
- 1935 Rural Electrification Commission established by FDR executive order as part of New Deal
- 1930s Self-Help Cooperative Movement
- Movement of unemployed workers to set up various barter and labor-exchange networks, most active in the early pre-New Deal years of the Great Depression.
- 1930 Young Negroes' Co-operative League (YNCL)
- Founded in of December 1930 by approximately thirty young black Americans under leadership from George Schuyler and Ella Baker. The YNCL grew into a strong presence in five US cities by the early 1930s. Several cooperatives were developed through the league.¹⁵
- 1923 First International Day of Cooperatives
- 1922 Japanese cooperative movement swells to 3 million members
- First legislation regulation regulating cooperatives in Japan was passed in 1900, after 1922 the cooperative movement in Japan would be stifled by authoritarian governments.¹⁶
- 1916 Cooperative League of the USA (CLUSA) is Formed

¹⁵ Nembhard, *Collective Courage*, 22, 242.

¹⁶ Zamagni, "World Historical Perspective on Co-operatives," 111.

- Founded by surgeon James P. Warbasse, with idea that cooperation is a natural outcome of democracy. The cooperative league exists today as the National Cooperative Business Association--CLUSA.¹⁷

1895 International Cooperative Alliance founded in London, England during first Cooperative Congress

1880s Formation of Key Groups in Black Populist Movement¹⁸

- 1880—Colored Grange of Tennessee established
- 1882—Negro Farmers' Alliance organized in Arkansas; other African American farmers' alliances soon formed in other states including Texas
- 1896—Colored Agricultural Wheels are organized across the South, Colored Farmers' National Alliance and Co-operative Union forms in Houston County, Texas

1872 Spread of farmers' cooperatives across Denmark

- Following death of cooperative promoter Nicolas Friederich Grundtvigts, co-operatives grow dramatically first in dairy farming sector. In following decades, agricultural cooperative societies spread across Scandinavia.¹⁹

1849 Formation of first rural mutual bank (or credit union) in Anhausen, Germany

1848 *Ateliers Nationaux* (national workshops) experiment in France

- Project to form unemployed into workers' co-ops in France following the 1848 revolution with 225 different workers' associations in Paris alone.
- The workers' cooperative model was first developed in France in 1831 with the formation of a society of carpenters.²⁰

1844 Rochdale Society of Pioneers Founded

- Formed in Rochdale, Lancashire, United Kingdom

¹⁷ Nembhard, *Collective Courage*, 12; National Cooperative Business Association, "NCBA CLUSA History & Timeline," <https://ncbaclusa.coop/about-us/our-history/>

¹⁸ Nembhard, *Collective Courage*, 21, 240.

¹⁹ Vera Zamagni, "A Worldwide Historical Perspective on Co-operatives and their Evolution" in *The Oxford Handbook of Mutual, Co-operative, and Co-owned Business* eds. Jonathan Michie et. al. (Oxford: Oxford University Press, 2017,) 103.

²⁰ Ibid, 102.

- Considered a foundational moment for the modern cooperative movement²¹
- Originators of the hugely influential Rochdale Principles

1752 Benjamin Franklin Founds the Mutual Fire Insurance company

- First recognized cooperative business in the US²²

Web Resources

- *Beyond the Bottom Line*, Documentary, <http://headlamppictures.com/worker-coops>
- University of Wisconsin Center for Cooperatives, <https://uwcc.wisc.edu/research/>
- Canadian Centre for the Study of Cooperatives, <https://www.usaskstudies.coop/>
- North American Students of Cooperation, <https://www.nasco.coop/>
- International Cooperative Alliance, <https://www.ica.coop/en>
- World Cooperative Monitor Report, <https://monitor.coop/en>
- Democracy Collaborative, <https://democracycollaborative.org/>
- The Next System Project, <https://thenextsystem.org/>
- The Evergreen Cooperative Corporation, <http://www.evgoh.com/>
- Ted Talks on Cooperatives and Cooperative Economics
 - Melanie Shellito, "Why the Cooperative Model is a Revolution," <https://www.youtube.com/watch?v=yrPdRg9kumM>
 - Benoit Molineaux, "Let's Create our Own Cooperative Economy," https://www.youtube.com/watch?v=E9wKDoX2_Q4

²¹ Lynn Pittman, "History of Cooperatives in the United States: An Overview" UW Center for Cooperatives, December 2018, 1, https://resources.uwcc.wisc.edu/history_of_cooperatives.pdf

²² Pittman, "History of Cooperatives in the United States: An Overview", 2, https://resources.uwcc.wisc.edu/history_of_cooperatives.pdf

- Julia Hutchins, "How Cooperative Businesses can Answer Tough Business Challenges," <https://www.youtube.com/watch?v=PzSw6OsEP9Q>
- Jim Brown, "How to Stop Poverty: Start a Worker-Owned Cooperative," <https://www.youtube.com/watch?v=LFyl0zz2yqs>
- Regan Muir, "The Housing Revolution: How Housing Co-ops Can Provide a Better Future," <https://www.youtube.com/watch?v=zhXirVAstYA>
- Michelle Lopez-Dohrn, "Growing Community Through a Food Co-op," <https://www.youtube.com/watch?v=lgGkigiukw8>
- Anu Puusa, "The Case for Co-ops, the Invisible Giant of the Economy," <https://www.youtube.com/watch?v=4nCJRrNTlus>

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Selected Annotated Bibliography

Primary Sources

W.E.B. Dubois, *Economic Cooperation Among Negro Americans* (1907)

- Dubois study provides a brief outline of a history of cooperative activity among Black Americans.

Clark Kerr, "Productive Enterprises of the Unemployed"

- Kerr's doctoral dissertation (in economics) is a comprehensive account of the nation-wide "Self-Help" movement of the Depression years, with extensive quantitative and qualitative data.

Marina Sitrin, *Horizontalism: Voices of Popular Power in Argentina*

- *Horizontalism* is an edited volume of interviews conducted by Sitrin of participants of various peoples' movements in Argentina in the years following the December 2001 uprising against IMF-imposed austerity measures. For Sitrin, *Horizontalidad* or the approximate translation "horizontalism" is a phrase that embodies the social arrangements that tie together what she calls a "movement of movements." "*horizontalidad* implies democratic communication on a level plane and involves—or at least intentionally strives towards—non-hierarchical and anti-authoritarian creation rather than reaction. It is a break with vertical ways of organizing and relating." (2-3) Sitrin talks with members from several independent movements starting with participants in the mass organized protests in December of 2001. Sitrin moves to discuss the Unemployed workers' movements who had undertaken the strategy of collectively blockading streets to bargain directly with governmental authorities. Sitrin has a chapter dedicated to the voices of members of neighborhood assemblies which had formed in the backdrop of economic crisis to meet the material needs of community members. Lastly, Sitrin talks with those involved with reclaiming workplaces that were either shut down by owners or were forcibly occupied by the workers. These workplaces were operated by their employees to facilitate production for use,

not profit. This book is a rich primary source that demonstrates the many different manifestations of cooperative economics in action.

Secondary Sources

Ostrom, *Governing the Commons*

- Ostrom's work takes as its central problem the question of natural resource economics. "The issue" with resources held in common, as Ostrom describes, "is how best to limit the use of natural resources so as to ensure their long-term economic viability." Historically speaking, "neither the state nor the market is uniformly successful in enabling individuals to sustain long term, productive use of natural resource systems."
- Ostrom departs from 3 standard models commonly used to describe the problems posed by "common property resources" (CPRs): (1) the "tragedy of the commons," (2) the "prisoners dilemma," and (3) the "logic of collective action. According to the Ostrom, the problem with these three models is that they are often used as "metaphors" instead of models by policymakers. That is, policy makers take these models at face value too much and come to two main erroneous conclusions. To overcome the problems that arise in these three models that policy makers typically advocate for either complete centralization of authority and management of resources or complete privatization of property rights governing natural resource use. For Ostrom, both of these options are problematic because they rely on imposition from outside those who use the resources and often encounter problems in real world applications. Ostrom suggests that empirical examples of success in managing common resources often depend on instead allowing those who use natural resources to govern themselves and cooperatively manage the use of CPRs.

Jessica Gordon Nembhard, *Collective Courage*

- Nembhard aims to lay out a narrative of African American cooperation as a whole from the late 19th century to present day. As Nembhard describes, this is a "rich history" that has grown out of responses to "market failures and economic racial discrimination." (1) As opposed to previous accounts that have stressed the failures of and difficulties faced by Black cooperative ventures, Nembhard argues that African Americans and other poor people of color "have benefited greatly from cooperative ownership and democratic participation throughout the history of the United States, much like their counterparts around the world." (2)

- Utilizing a thoroughly theorized and conceptual definition of cooperative economics and theory, Nembhard investigates a historical series of important instances of African American economic cooperation as well as the economic ideas of leading Black scholars such as W.E.B. Du Bois. In three separate parts, Nembhard investigates early instances of Black mutual aid in the Reconstruction and populist and progressive eras, “deliberative cooperative economic development” spanning 1917 to 1975, and finally late twentieth and early twenty-first century examples of Black cooperation which bridge elements from both of these distinct historical eras.

John Curl, *For All the People*

- Curl premises his narrative on his observation that while “cooperatives have been widespread and important in many periods of American history... it might almost seem as if they don’t exist and never existed in the US.” (7) Curl is motivated by a supposed need to rescue and add a perceivably lost historical phenomenon to the historical record. Curl published the second and expanded edition of his book in 2012, writing first in the wake of the economically tumultuous 1970’s and then republishing after the 2008 financial crisis, both of which gave rise to higher levels of cooperative activity.
- Curl’s narrative assembles all types of cooperation and communalism into one larger movement, capable of achieving the same levels of societal change. Curl’s argument lends itself to a conception of all forms of cooperative behavior as a radical alternative to normative forms of organization. Curl’s own experience living at the commune Drop City from 1966 to 1968, and also as a member Heartwood Cooperative Woodshop bear heavily on his interpretation of the cooperative movement.

Joseph Knapp, *The Rise of Cooperative Enterprise* and *The Advance of Cooperative Enterprise*

- Knapp’s expressed purpose is to reveal how “cooperative organizations in the United States gradually took form in a distinctive way as the nation progressed from frontier conditions to a strong national economy” and how “cooperatives took great steps forward under the unique conditions that prevailed in the United States from 1920 to 1945.” (1) Knapp’s extensive narrative effectively highlights the consistent presence of economic cooperation in U.S. history. The author’s primary purpose in writing to add the achievements of cooperatives to the historical record and demonstrate how their presence is indicative of a “need for attention to common-felt problems.”

Richard C. Williams, *The Cooperative Movement: Globalization from Below*

- Not strictly a historical work, Williams' monograph includes a large amount of discussion regarding political economy. As indicated by the title, Williams's workplaces Cooperatives within the larger system of globalization. Williams looks at cooperatives in the developed and developing world, and illustrates how cooperatives serve different, though in his mind always positive, roles in both scenarios. Williams writes that "the theoretical foundation of this book is that cooperation, rather than competition, provides ... optimum conditions for a free and fair marketplace." (4) This is interesting because Williams sees cooperatives as entities that could potentially exist within mainstream market economics, not outside of it.

Steve Leikin, *The Practical Utopians*

- Steve Leikin's *The Practical Utopians* deals with cooperation undertaken by working people in the Gilded Age. While the Gilded Age was characterized by dramatic economic growth, Leikin illustrates how workers used cooperation as a solution to burgeoning issues such as "low wages, job insecurity, threatened craft skills, and community instability." (xviii).

L. Randall Wray, *Why Minsky Matters*

- Not related to cooperative economics explicitly but lays in out clear and accessible detail key ideas from a hugely influential heterodox economist. As such, the book provides insights into thinking outside of the paradigm of mainstream economics, which is crucial to the study of cooperative economics. Minsky started to garner much more attention from academics in the wake of the Great Financial Crash of 2008, of which he was one of the few academic economists to predict. According to Wray, "the fundamental insight that Minsky left with us," is that the "internal dynamics of our modern economy are not equilibrium-seeking." (15) In essence, Minsky's most memorable contention is that stability itself is destabilizing. Stability leads to capital to take greater risk and chase more questionable returns thereby bringing about future financial crises. Aside from examining Minsky's work on finance and banking, the book also delves into Minsky's approach to the problem of poverty and employment, where he also offered heterodox solutions.

Janelle Cromwell, "Worker Cooperatives and Spaces of Possibility: An Investigation of Subject Space at Collective Copies"

- A work of critical geography, Cromwell's case study of the Massachusetts cooperative print shop, Collective Copies, uses the cooperative model to

challenge and interrogate capitalist notions of space and time. Cromwell draws from the theoretical model of Marxist geographer David Harvey which illuminates how space and time are organized “under capitalism” in order to understand “spatial-temporal organization of *noncapitalist* growth” which is exemplified in the case of worker cooperatives. (727) Cromwell’s study is based on ethnographic research conducted at the Collective Copies co-op which includes participant observation as well as 20 tape-recorded interviews. Cromwell concludes that cooperative growth, rather than embodying “an inherent logic of expansion” like that under capitalist space, “is an outcome of subjective experiences and desires.” (728)

J. Lloyd Lill, Jr. “Cooperative Ventures in the United States”

- Writing in 1984, Lill comments on the rise of worker owned firms in the US since 1970 as an example of an “alternative form of business enterprise” that is not based on models of growth, development of new technology, and extraction of limited resources. (376) Lill puts forward four reasons for this development: First, the general desire for more democratic workplaces. Second, rising levels of unemployment and troubles in productivity had created a desire between employers and employees for alternative models of work. Third, a wave of Unions and employees buying back their plants from companies against the backdrop of a wave of plant closures. Fourth, a proliferation of success stories about worker-owned businesses. Lill continues to evaluate the history of cooperation in the United States from the 19th century Knights of Labor experiments up through the contemporary period. Lill then explores reactions to the proliferation of cooperative from organized labor, management, economists, the pope, protestant writers, and political philosophers. Lill offers several conclusions, the most important being that workplace democracy offers a clear pathway to a more democratic and just society.

Bobby Sullivan, *Revolutionary Threads: Rastafari, Social Justice, and Cooperative Economics* (2018)

- Written by a non-academic and veteran of the Washington D.C. punk and hardcore scene, *Revolutionary Threads* comes to cooperative economics from a perspective informed by the critique of capitalism offered by the Rastafari movement. For Sullivan, cooperative economics is “the way” in that “it is literally the intersection between democracy and the real economy, and it not so quietly builds a new world within our dying old one.” (9) The book investigates a wide sweep of history, from the pre-colonial US through the abolition movement and civil war and finally ending with several chapters on the global 1970s and

international resistance to capitalism. Sullivan's work offers a fresh perspective on how cooperative economics can appeal to a wide variety of moral commitments, from Sullivan's own Rastafari values to broader general democratic forces. Sullivan does a good job of including non-western perspectives with sections of Rastafari co-ops in Jamaica, experiences of globalization in Nigeria and Cuba, and the practice of Rastafari communal practices in Africa.

Mo Moulton, "Co-opting the Cooperative Movement? Development, decolonization, and the power of expertise at the Co-operative College, 1920s-1960s" (2021)

- Moulton's article places the British cooperative movement in an international and decolonial context. Moulton departs from the observation that the British cooperative movement and governmental cooperative departments were ubiquitous in the 20th century British empire. Not only did cooperative departments in British colonial possessions assist in running networks of agricultural and credit cooperatives, but they also pushed cooperatives as "schools of democracy and incubators of modern citizenship." (2) As such, Moulton argues that the cooperative movement across the British empire was a central feature of the developmental state. While historically, cooperatives had ties to left wing politics Moulton demonstrates how within the context of empire cooperatives fit into a much broader range of political dictates and economic systems. Moulton includes a close study of the Cooperative College, located in Manchester before moving to Loughborough between 1920 and 1960, in which they examine how students who attended the college from across the British Empire formulated resistance to empire in interwar internationalism. Egyptian students, for example, were able to use lessons from the college to build a "nationally specific development programme" (9). Lastly, Moulton turns to case studies of former Cooperative College attendees involved in the decolonization process in Sierra Leone, Malawi, and Ghana. This work builds on a greater body of work that points to governmental bureaucracies as key points in building post-colonial states. Moulton's article is a very good example of the political economic complexity of cooperatives and their ability to advance a variety of goals. Moreover, students interested in economic cooperation in the post-colonial world and greater global south could make good use of this article.

Bruno Jossa, "Marx, Lenin, and the Cooperative Movement" (2014)

- Jossa article aims to address and ultimately refute the ambivalence around cooperatives as a mode of economic organization that exists within orthodox Marxist theory. Through close readings of sections of *Capital* as well a 1923

paper written by Lenin on cooperatives, Jossa demonstrates that for these theorists of socialism and communism held cooperatives in a positive light. Rather than just letting workers become their own capitalists, Marx and Engels saw that cooperatives offered a radically different relationship between the worker and the mode of production that would be very instrumental in the transition to a non-capitalist society. For Lenin, cooperatives offered a mode of organization that would both be palatable to the rural proletariat and efficient and productive. Jossa ultimately argues that even though cooperatives may not have been present in soviet-style communist countries, it was not because cooperatives were not compatible with a socialist economy.

Nikolay Kamenov, "Imperial cooperative experiments and global market capitalism, c.1900-c.1960" (2019)

- Kamenov aims to complicate the prevailing narrative that the global cooperative movement can be ultimately traced back to the Rochdale model in Great Britain, which spread across Europe and then finally throughout the rest of the world. Kamenov counters this story by demonstrating how cooperative knowledge did just spread from metropole to empire but rather through webs of communication that included India and West Africa, and also how this cooperative knowledge originated beyond the reach of empire. Kamenov additionally points out a "dialectical relation of cooperatives to the broader economic system." (220) That is, cooperatives were not just an appendage to global capitalism, but instead the networks of exchange they created helped to shape global consumer societies as well as the supply and marketing of commodities to world markets. Kamenov's contribution here importantly draws attention to the significance of the cooperative model in helping shape the nature of global capitalism as it exists today. Kamenov includes a literature review and historical sketch of the growth of different cooperative models across the world, before moving to a case study of the development of the cooperative movement in India from 1900 to 1950 and then demonstrating how this movement served as a model for other colonial regions with a particular focus on West Africa. Kamenov's article is very useful for students interested in problematizing the western-centric dialogue surrounding the study of the cooperative economic model as well as students interested in the role of cooperatives in capitalism and empire.

Jonathan Michie et. al. *The Oxford Handbook of Mutual, Cooperative, and Co-owned Business* (2017)

- This edited volume is a good resource for anyone looking for a very in-depth look at different forms of cooperative models as well as examples of case studies from around the world. The editors of the volume aim to cover the entire breadth of member-owned business which they define as any type of organization owned by stakeholders other than investors (as is the case in the standard corporation.) The volume is divided into forty-two chapters divided between eight parts. The first part covers different theories of cooperative enterprise and the wide range of modes such pursuits can take. The second part is also theoretical, covering different rationale for cooperative enterprise including how the model serves as a coordination mechanism along with the political and social dimensions of the cooperative form. The third part provides the history of member-owned organizations in both a US and global context. The fourth part tackles how different types of cooperative organizations fit into the global economy with chapters focused on specific types (worker coops, agricultural coops, etc.) and how to think about them internationally. The fifth part discusses the various ways that member owned enterprises are governed. The sixth part is the largest in the volume, with 12 chapters on different national case studies of cooperatives in action including Mondragon in Spain and cooperatives in the Global South. The seventh part discusses corporate and sector case studies of cooperatives such as how cooperation is challenging and changing corporate governance worldwide and the role of cooperatives in development. The eighth and final part covers contains chapters offering perspectives on the future of cooperation. This source could be greatly helpful to anyone looking to get a grasp on how wide of a context cooperative economics can and has been applied in, with a wealth of great case studies and citations for future research.

Martin Parker, et. al. *The Routledge Companion to Alternative Organization* (2014)

- This edited volume, along with the *Oxford Handbook of Mutual, Co-Operative, and Co-Owned Business*, is a great, comprehensive starting point for students interested in cooperative economics in all its manifestations. Not focused on cooperatives per se, the focus this of this edited collective is alternative organizational forms that depart from the corporate norm of globalized capitalism. A stated goal of the volume is to counter the prevalence of “the illusion of TINA, that There is No Alternative.” (xxii) The volume does this by presenting studies of different organizational forms across three different sections covering: (1) work and labor, (2) exchange and consumption, and (3)

resources. Classic cooperatives appear across the sections in studies of worker-owned firms and credit unions, but so do different forms of communal organization such as fair trade, family and household reproduction, and open-source technology. The wide berth of these chapters is especially useful in understanding cooperative economics in all its forms outside of traditional cooperatives.

Joey Power, "'Individualism is the Antithesis of Indirect Rule:' Cooperative Development in Colonial Malawi" (1992)

- Power's article provides an interesting counterpoint to the notion that cooperatives are always and everywhere a path towards economic empowerment and liberation, especially for marginalized communities. Power examines the implementation of cooperatives by British colonial officials in Malawi in the years preceding and following the first World War and reveals that cooperatives were largely rejected by Malawians. Cooperatives were part and parcel of the British strategy of indirect rule, whereby authority would be delegated to tribal chiefs to maintain "traditional" order in the colonial and prevent wealth accumulation by colonial subjects. In the eyes of the colonial administration, cooperatives were a means to redirect the energy of the emerging indigenous *petit bourgeoisie* in collective pursuits and into "state monitored commerce." (319) From Power's point of view, the development of an indigenous capitalist class was instrumental in resistance to empire and colonial control. While Power seems to have prior ideological commitment to individualism that should be considered when evaluating his argument, the article nonetheless shows the limits of the cooperative form for collective empowerment—especially when implemented from above instead of arising organically from the cooperators themselves. This article is a good resource for students interested in examples of cooperative economics outside of a western context and evaluating the role of prevalent cooperatives within the British empire.

Maria Sitrin, *Everyday Revolutions: Horizontalism and Autonomy in Argentina* (2012)

- This book is a follow-up to Sitrin's earlier oral history volume *Horizontalism: Voices of Popular Power in Argentina* about the same topic. Like the oral history volume *Everyday Revolutions* documents the *horizontalidad* and *autogestión* movement in Argentina following the eruption of popular protest in late 2001 following a years-long debt crisis. Sitrin describes her aim with the volume as documenting what can happen when a sharp break in history opens the door for the creation of something new, and in this case specifically, for the creation of

real bottom-up democracy. In Sitrin's eyes, the different communalist and cooperative movements she studies are not just experiments but rather a dramatic remaking of social relations. The cases of horizontalism in action that Sitrin examines include the occupation and collective operation of shuttered factories by the workers, middle-class urbanites setting up neighborhood councils to meet collective needs, and the unemployed organizing networks of mutual aid. Sitrin's study first covers the historical roots of popular movements in Argentina and their contentious relationship to the state, before discussing the context of the early 2000s and finally providing several chapters containing case studies and reflections on different forms of collective power. While Sitrin does not use the phrase "cooperative" herself, all the cases she discusses would fall within the Blum center's definition of cooperative economics. As such, her accessible study is a good starting point for students interested in examples of the wide range of relevant cooperative activity as they have been applied in the context of the Global South and resistance to the state as well as international capital.

George Cheney, *Values at Work: Employee Participation Meets Market Pressure at Mondragón* (1999)

- Cheney's work explores one of the main questions surrounding the success of Mondragón (which also applies to cooperative business as a whole): How does a cooperative organization successfully exist in a market environment while also staying true to its communal values which are often in direct opposition to those of the market? For Cheney this is a matter of "organizational integrity" which refers to the ability of value-based organization to remain true to its original commitments while also growing in success, size, centralization, and bureaucratization. For Mondragón, these values are solidarity, participation, and equality. In Cheney's formulation, the answer to this question is complicated. Cheney argues that as Mondragón has grown while international capitalism has increasingly become consumer oriented as opposed to producer oriented, that the nature of worker participation has become increasingly linked to the "real or perceived demands outside of the organization's boundaries." Cheney refers to this phenomenon as "the marketization of employee participation." To lay this argument out Cheney has chapters detailing the history of the organization, deep analysis of intra-organization communication patterns, lessons offered by the Mondragón experience, and finally considerations on the future of worker participation. *Values at Work* is a great resource for students looking for an example of nuanced analysis of a singular cooperative that places the organization in its larger economic context. Cheney's singular focus on the

consumer-oriented economy might feel dated today, as we have moved beyond the end-of-history, dot-com bubble era of consumer exuberance and into a post-great recession era of returned labor agitation, reduced purchasing power, and a more thoroughly financialized economic world. Still, this is a useful study of one of the most visible examples of cooperation in practice.

Thomas Hanna and Marjorie Kelly, “Community Wealth Building: The Path towards a Democratic and Reparative Political Economic System” (2021)

- Hanna and Kelly introduce and explain the “Community Wealth Building” strategy or CWB. CWB was developed by the Democracy Collaborative in the mid-2000s to describe ongoing trends of economic reorganization around the world. The main thrust of CWB is the development of a network of institutions that help organize land, labor, and capital under community control and to utilize these resources for common benefit instead of profit. While cooperatives fall under this model, so do community land trusts, public enterprises, and a wealth of other non-profit organizations. The key to CWB is to coordinate among a network of these organizations to most benefit local communities. Kelly and Hanna describe the history of CWB, which they see as stretching back to the crisis political economic and civil rights in the post war era. For them, CWB is a way to rectify both civil rights and economic empowerment at the same time. CWB, in their formulation, provides a model for rebuilding economies—not just specific enterprises—in a democratic, people-centered mode.