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Co-operative Ideology

Ian Adderley

The material in this extract is drawn from *Co-operatives: Linking practice and theory* (Adderley, in press). The discussion focuses on the dual nature of co-operatives, which is both economic and social. An overview of the historical debate on co-operative ideology considers the different understandings of the dual nature. This is followed by a discussion of the cultural element before concluding with a discussion of who benefits from co-operatives.

Economic or Social?

It is widely (but not universally) accepted within the co-operative movement that co-operatives serve more than just economic need (Jones, 1894). It is arguably central to co-operative ideology or theory that they serve both social and economic needs of members, namely their 'dual nature' (MacPherson, 1996; Novkovic et al., 2022; Puusa & Saastamoinen, 2021), with debates focusing on the extent to which one is prioritised (Adderley, 2019). Social, in this context, is as it relates to people. Watkins (2017) articulated:

> The underlying concept of co-operation being solidarity, however, its tendency, when it is true to itself, is towards the resolution of conflict through the reconciliation of interests and social integration. Every genuine co-operative is a community organising some part of its members' economic life. (p. 30)

MacPherson (1996) explained co-operatives as follows:

> Most of them exist primarily to meet economic purposes, but they have social and cultural goals as well. By 'social' is meant the meeting of social goals such as the provision of health services or child care. Such activities must be conducted in an economic way so that they provide the kinds of services that benefit members. Co-operatives may also embrace cultural goals in keeping with member concerns and wishes … Indeed, in the future helping to provide a better way of life — cultural, intellectual and spiritual — may become one of the most important ways in which the co-operatives can benefit their members and contribute to their communities. Member needs may be singular and limited, they may be diverse, they may be social and cultural as well as purely economic, but, whatever the needs, they are the central purpose for which the co-operative exists. (pp. 5-6)

Laidlaw (1980) emphasises this point too:

> … though they are both economic and social in their aims, co-operatives are primarily economic and must succeed in business in order to continue at all. A co-operative that fails in a commercial sense

> can hardly be a positive influence in a social way … Thus while economic and social are two sides of a coin, viability as a sound business must enjoy prior claim. (p. 38)

Watkins (1986) was clear on priority:

> The primary objective of Co-operative associations, whether their founders or members do or do not dream of far-reaching social consequences, is normally to obtain power over the nearest part of the economic mechanism on which their livelihood or standards of living depends. (pp. 21-22)

Digby (1965) synthesises previous definitions to argue that co-operative objectives should include the "ideas of freedom, of democracy, of mutual responsibility in economic life, the idea of an ethical approach to that life" (p. 8). Others have noted how such a definition "seems to sum up their combination of social and economic objectives" (Arthur et al., 2003, p. 172).

From the perspective of agricultural co-operatives, describing the work of Sir Horace Plunkett, the following definition was given:

> A co-operative society may be defined as a voluntary association of individuals, combing to achieve an improvement in their social and economic conditions, through the common ownership and democratic management of the instruments of wealth. (Smith-Gordon & Staples, 1917, p. 69)

Others have taken narrower views. Kaufmann is quoted as setting out a general definition of a co-operative:

> The co-operative society is an association of a variable number of individuals, or of individuals' associations who, united of their own free will and on the basis of equality of rights and responsibilities, transfer some of their economic functions to a common enterprise in order to gain an economic profit. (Lambert, 1963, p. 109)

Swedish co-operator, Anders Örne (1937) saw economic interest as the main driving force:

> Co-operation is an economic system arising out of the direct interests, on the part of those participating, in goods and services as such. It assumes the form of free undertakings established by those who desire to make use of the operations and activities themselves that are carried on by these undertakings for the purpose of promoting their democratic economy or the purist of their occupation. (p. 2)

Nevertheless, Örne (1937) still saw co-operatives as the antithesis to the traditional profit-seeking enterprise. These tensions play out in approaches to financial co-operatives, such as credit unions, too — contrasting an instrumental approach focusing on "structures, organisations and growth", against an idealistic approach, "focusing on community development, self-help and small units" (Berthoud & Hinton, 1989, p. 21).

Birchall (2017) argues the dual nature argument is "well-meaning but inadequate" (p. 27), burdening co-operatives comparative to other economic actors. He argues that there is "one clear aim of a co-operative — to meet the economic needs of its members" (Birchall, 2017, p. 28). Similarly, Calvert (1933), having surveyed other available definitions, explains that "co-operation, then, is a form of organisation, wherein persons voluntarily associate together as human beings, on a basis of equality, for the promotion of the economic interests of themselves" (p. 14).

Münkner (2016) does however take a broader view arguing that the "object of co-operative societies is pursuing a long-term, mainly economic purpose, combined with additional social and/or cultural objectives" (p. 62). The same is true of Strickland, Calvert's contemporary and fellow registrar in India (and elsewhere), who advocates interpreting the word 'economic' in a broad sense (Strickland, 1933). This broader view can be seen too in Strickland's favouring of 'better living societies' (see Campbell, 1951). It should be added that Rhodes (2012) notes that Calvert himself was contradictory on his definition of a co-operative, often emphasising the moral uplift of co-operatives, differing from capitalist rivals.

Shah (1995) articulates co-operative purpose through the lens of salience:

> … salient co-operatives are those that are central to the lives of their members, to the business in which they compete, and to the economy of their domain. Seeking salience thus implies the process

> through which co-operatives transform themselves from being peripheral and inconsequential to their members, their business and the economy of their domain to becoming central and consequential to them. (p. 47)

Lambert (1963) provides us with a definitively broader definition of a co-operative as “an enterprise formed and directed by an association of users, applying within itself the rules of democracy, and directly intended to serve both its own members and the community as a whole” (pp. 231-232).

In contrast, Fauquet (1941) contextualised the social/economic dimension differently, distinguishing between an association of individuals (social element) on the one hand and a common undertaking (economic element) on the other. This distinguishes the social relationships among members, and the economic relationship members have with the co-operative enterprise or undertaking. Thus, it places members as an association of individuals, and the co-operative undertaking in meeting their needs and reflects earlier writing by Mariano Mariani (Lambert, 1963). Lambert (1963) challenges this articulation, however, questioning whether one can conceive an enterprise “outside its social object and management boards” and suggests “it is the association that determines the social object of the enterprise and governs it” (p. 108). Instead he articulates that “it is the association that is an enterprise” (Lambert, 1963, p. 234). Watkins (1986) refers to the association of individuals in here as “the entrepreneur” (p. 111). Members retain their individual autonomy, but also have a collective identity. Similarly, the individuals have been described as an “association of entrepreneurs” (van Dijk et al., 2019, p. vii). This is perhaps a subtle but important difference — between a collective ‘entrepreneur’ and a collection of individual ‘entrepreneurs’.

The splitting out of the economic and democratic has been challenged (Mooney & Gray, 2002). Mooney and Gray make several important observations. They challenge the economic-only view of co-operatives, taking the view that the democratic control of co-operatives is a political element that would be unnecessary if co-operatives were purely economic entities. They suggest it is the democratic aspect that allows for other values and interests from members, and that see co-operatives fitting into a new social movement. They emphasise the dual objectives are intrinsic to co-operatives, that a tension between these is necessary to be considered a co-operative, and that they are maintained by democratic principles. Sanchez Bajo and Roelants (2011) instead note the current ICA definition refers to people uniting and meeting their needs ‘through’ an enterprise. They explain that the “word ‘through’ indicates that the ‘enterprise’ character of the cooperative, though full-fledged, is subordinated to its character of ‘association of persons’” (Sanchez Bajo & Roelants, 2011, p. 116).

Outside of the movement different, and often narrower, interpretations have been taken. This is particularly true with late 19th and early 20th century economists. Pantaleoni is quoted as saying in 1898 that “Cooperators are not motivated by aspirations to higher purpose but by the same seeking after economic self-interest to which co-operatives were generally considered alternatives” (Vitaliano, 1977, p. 21). The line of argument was rebutted by Gide (1898).

From North America, particularly in relation to agricultural co-operatives, different schools of thought emerged. These have been characterised as the California School under the leadership of Aaron Sapiro and the Competitive Yardstick School, influenced by Nourse (Fairbairn, 1994; Nourse, 1922; Torgerson et al., 1998). Emelianoff (1948) provides a run through of the challenges he perceives with the theoretical underpinning of co-operatives, with a clear preference for those writers focusing on the narrower economic interest. Zeuli & Cropp (2004) praise the United States Department of Agriculture definition of a co-operative as “a user-owned, user-controlled business that distributes benefits on the basis of use” because it captures principles of “user ownership, user control, and proportional distribution of benefits” (p. 1). These form part of a discrete but consistent train of thought or ideology found predominantly in relation to US agricultural co-operatives.

Robotka (1947) provides another example, and is quoted as articulating the following definition:

> It is an association of autonomous units (farm or other busness units, or households) whose purpose it is to conduct jointly some activity which is an integral part of the operations of the participating units, as a means of increasing incomes, reducing costs or otherwise enhancing the economic interest of the participating units. (Lambert, 1963, p. 233)

Lambert has however considered this to simply be a capitalist cartel where non-co-operators sell produce through a co-operative to other non-co-operators. These theories can be seen to focus mainly on economic benefit, pitching the intersection between 'social service' and 'economic philosophy' as a dilemma (Torgerson et al., 1998). That economists have struggled to reconcile the economic and social dimensions is not a new observation (Levi & Davis, 2008). Hansmann (1996), in his work exploring the ownership of enterprise, pays no regard to social objects in exploring the definition of a co-operative. Those approaches focusing narrowly on ownership and control continue (Camargo Benavides & Ehrenhard, 2021).

Others bring in a classification of co-operatives suggesting a distinction between two types (Miner & Novkovic, 2020; Novkovic, 2018; Novkovic et al., 2022). A 'Type 1' co-operative has as its reason for formation the addressing of market failure or economic injustice. By contrast, Type 2 co-operatives have social and/or environmental justice as their reason for establishment. The definitions above from economists and lawyers fall more closely into the Type 1 categorisation, with the Type 2 category being more closely aligned with the definition in the ICA Statement (Miner & Novkovic, 2020).

On the other end of the spectrum, a trend has developed since the 1980s to look to 'social co-operatives', and more recently, 'general interest co-operatives' (Münkner, 2016). There are a range of views, from those who recognise them as being firmly part of the co-operative movement (Fici, 2013), those who recognise the challenges and seek to provide an inclusive definition (Hiez, 2018), and those who question whether they are in fact co-operatives (Münkner, 2016). Others have put social co-operatives into the category of a 'hybrid' co-operative (Spear, 2021).

The social aspect of co-operatives has been contextualised by Böök (1992) who argues that social responsibility is an essential feature of co-operatives because they have always been set up by people who wanted to have greater control over their social and economic conditions. This has been echoed recently by Wilson et al. (2021) in an ICA discussion paper:

> It must be underlined that, notwithstanding its social purpose, a cooperative is an economic enterprise. It must make its way in the marketplace and so must be fully competitive. Its essential cooperative character need not stand in the way of commercial success. In fact, the cooperative identity contains many components that, if emphasized, can constitute a substantial competitive advantage. (p. 10)

Kagawa (1936), in what he described as 'brotherhood economics', articulates the importance of the social principle, set in the wider context of strong Christian faith, saying that "we learn that the economics of coöperatives is founded on the consciousness of social solidarity. And coöperative types of production, distribution, and consumption grow out of this fundamental social principle" (p. 69).

This opens a question of whether co-operatives address market failure, or societal/social failure. Böök (1992) argues that co-operatives cannot be thought of simply as a solution to market failure. Instead, he suggests that they should be thought of as correctives to societal failures. Arizmendiarrieta (2013) sets out:

> We have accepted the cooperative considering it as suitable for resolving urgent development and social promotion problems, and for effectively contributing to the impulse of another social and economic order with the resulting consequences. We have not presented the cooperative as a path for simply personal, or even less, individual promotion but as suitable to resolve the distancing from and lack of concern for the community. (pp. 95-96)

This topic can be looked at practically at the level of an individual co-operative. In looking at membership strategies for consumer co-operatives, Spear (2000) articulates that there should be as much congruence between the community/social relations of a co-operative and

its customer/member relationships as possible, as part of a co-operative advantage. Away from definitional approaches, others have sought to articulate what makes up the formula for co-operation, focusing on: shared commitment, community interest, and mutual trust (McDermott et al., 2010).

And Cultural?

It is clear much of the debate and writing on this topic sits between ‘economic’ and ‘social’. The ICA Statement does, however, refer to co-operatives meeting the “economic, social, and cultural needs” (ICA, 2015, p. 2) of their members. In writing the background paper to the ICA Statement, MacPherson (1996) articulated the meaning of ‘cultural’:

> Co-operatives may also embrace cultural goals in keeping with member concerns and wishes: for example, assisting in the promotion of a national culture, promoting peace, sponsoring sports and cultural activities, and improving relations within the community. Indeed, in the future helping to provide a better way of life — cultural, intellectual and spiritual — may become one of the most important ways in which the co-operatives can benefit their members and contribute to their communities. (p. 6)

More recently, the ICA explain that the component parts of ‘economic, social, and cultural’ within the definition are to be pursued ‘simultaneously’, albeit to varying degrees, noting that the “cultural element is as fundamental as the other two, since cooperatives develop and depend upon a culture of cooperation” (Wilson et al., 2021, p. 9). This is the most natural reading of the definition (Adderley, 2019). Much of the earlier quoted work focuses on the ‘dual’ nature of co-operatives, in support of co-operatives having economic and social purposes. The word ‘cultural’ rarely appears. It may well be the case that ‘cultural’ is assumed to fall within a broader definition of ‘social’.

The role played by consumer co-operatives in the cultural life of their members in Britain has been well explored, including details of a ‘sub-culture’, or ‘co-operative culture’ created by them (Gurney, 1996; Robertson, 2016). Following a submission by co-operators in Germany, UNESCO added the “idea and practice of organizing shared interests in cooperatives” onto their register of Intangible Cultural Heritage in 2016 (UNESCO, 2016, point 1).

There are different interpretations of ‘cultural’. Some talk of ‘co-operative culture’ and have sought to explore what that means for members (Hogeland, 2004). The earlier definition offered by MacPherson (1996), at least in part, focused on cultural activities. More recently, as with the quote above from the ICA (Wilson et al., 2021), we see use of the phrase ‘culture of cooperation’, which is open to interpretation and is less well defined.

But to answer the question posed in the title ‘economic or social’, most views point to the answer being: both. Co-operatives are enterprises, so operate economically, but their purposes go beyond just economic interest. This leads to a discussion as to for whose benefit co-operatives exist.

For Whose Benefit?

This can be looked at through three lenses:

- Member benefit contrasted with (or related to) wider community or general benefit.
- The relationship between the individual and the co-operative (i.e. worker, producer, consumer, supporter, investor).
- Immediate vs future — considering co-operatives as intergenerational.

For Member or Wider Benefit

The centrality of members in co-operatives, as self-help enterprises (Holyoake, 1908; Lambert, 1963; Parnell, 2018), is set out clearly in the ICA Statement (ICA, 2015). It is considered to be one of the most important characteristics of a co-operative (Münkner, 2010) that individuals have a dual capacity ('double quality' or 'identity principle') (Fici, 2014) as both owners and decision-makers in a co-operative and the participants in its business whether through purchasing goods or services (consumer), supplying goods (producer), or providing labour (worker) (Fici, 2014; Sanchez Bajo & Roelants, 2011).

Drawing on the foundational work of Raiffeisen and Schultze-Delitzsch in Germany, Grosskopf et al. (2016) put forward the 'three S principles' which are suggested to be central to co-operative identity: self-help, self-administration, and self-responsibility. They argue that member-promotion is "the leading co-operative principle and maxim" (Grosskopf et al., 2016, p. 8).

Over time, classifications such as social co-operative (Fici, 2017), general interest co-operative (Hiez, 2018), alternative co-operative (Münkner, 2010), and community co-operative (Somerville, 2007) have emerged. Co-operatives with an external focus have been characterised as third-party-focused co-operatives, a form of hybrid organisation (Hatak et al., 2016). While the market-focus may risk degenerating a co-operative toward that of a traditional investor-owned company, Hatak et al. (2016) argue that there is also a risk that a focus outside of members re-orientates co-operatives toward the traditional non-profit sector.

Social co-operatives, as a defined concept, were first legally recognised in Italy in 1991 to pursue the common good (Thomas, 2004). Fici (2017) argues that "notwithstanding its particular purpose, the SC [social co-operative] remains, at its core, a cooperative, from which it borrows the general structure of internal governance and other peculiar attributes that are consistent with an SE's [social enterprise's] nature and objectives" (p. 47). Fici goes on to articulate that a social co-operative is a co-operative with a non-mutual purpose because its aim is legally defined (in Italian law) as being "to pursue the general interest of the community in the human promotion and social integration of citizens" (pp. 47-48). In seeking to reconcile the two positions, it has been argued the 'soul' of the social co-operative is that of a typical social enterprise, but its 'body' is that of a co-operative. This would suggest an application of co-operative governance features (rather than identity) to an organisation existing for benefit not contingent on membership (Fici, 2014).

The concept of social co-operatives and general interest co-operatives has been critiqued:

> By broadening the object of co-operative societies from promotion of mainly economic interests of their members to the promotion also or even mainly of social or cultural interests, it has become more difficult to distinguish between objectives of the co-operative society and positive external effects of co-operative operations. Where co-operatives work successfully, they usually have positive external effects on fellow citizens, the community and the region: The basic difference between co-operatives and general interest organizations is that co-operatives are working according to the motto "we for us" and general interest organizations are working according to the motto "we for you". (Münkner, 2016, p. 54)

A distinction can be drawn between organisations set up by members for self-help but also in the interests of others, and an organisation set up for wider general benefit (Münkner, 2016). Other aspects of co-operative identity or theory are brought into play here too — specifically that of voluntary association. It is for individuals to voluntarily agree to participate in a co-operative, to meet the obligations of membership — what Watkins (1986) calls responsibility or function. It becomes less clear how this is met were a co-operative to exist for the general interest of persons irrespective of their membership status. People must be free to leave a co-operative.

Departing from the value of self-help, and the principle of voluntary membership could lead to a kind of isomorphism toward an organisation more akin to a charity or voluntary organisation (Spear, 2021).

There is a relevance here to the religious outlook of some of the founding thinkers of the co-operative movement. The role of Christian Socialists was significant. Raiffeisen, with Christian influence was at times operating charitably in nature (Lambert, 1963). Du Bois (1907) maps out the role of the church in co-operative development among African Americans. In relation to the early 20th century, Gordon Nembhard (2014) explains:

> African American cooperatives grew out of the mutual-aid tradition, particularly of religious and fraternal organizations of Black independent educational institutions. Values such as solidarity, concern for community, helping thy neighbor, and lifting as you climb were commonly espoused and practised. (p. 82)

The co-operatives forming Mondragon were formed under the influence of José María Arizmendiarrieta, a "determined proponent of Catholic Social Doctrine" (Novkovic et al., 2023, p. 289). This brings us to the idea of the common good.

It is argued that co-operatives exist for the common good (Alcock & Mills, 2017; Lambert, 1963; Mayo, 2015; Sanchez Bajo & Roelants, 2011). The term in a co-operative context is rarely defined, despite being subject to varying interpretations. For example, Jaede (2017) set out the political and philosophical perspective, while Argandoña (1998) covers stakeholder theory and the common good. On some definitions, this challenges the concept of existing for member benefit. Sanchez Bajo and Roelants (2011) helpfully distinguish between 'common' and 'public':

> Considering a cooperative as a para-public type of business is often the result of confusion between the concepts of 'public' and 'common' In spite of their 'joint characteristics' (joint control, joint ownership, joint stakeholder approach etc) cooperatives are fully-fledged private enterprises enjoying complete autonomy and independence from the state and any other third party. They develop what one could call 'common-private' economy. (p. 119)

The use of 'common' here is to directly contrast 'individual'. As to whether 'common good' means looking at the collective good of members, or the community beyond members, depends entirely on how you define those terms. It has been considered in the context of Mondragon (Stikkers, 2020).

More generally, in exploring the common good and co-operatives, Novkovic (2018) notes the changes to co-operative purpose over time: whereas historically their purpose was to meet member needs, the changes to modern society means that they cannot think of members in isolation. This requires them to broaden their scope by considering issues of social justice, the environment, dignity, and democracy at work. This puts the wider benefit back through the lens of member benefit, in a way that is similar to the concept of 'salience' in relation to co-operatives articulated by Shah (1995).

Gordon Nembhard (2014) emphasises the importance of solidarity as a long-standing feature of the co-operative movement among African Americans. She notes how solidarity extends beyond one's own community, in what is described as "external solidarity", based on principles of "intercooperation and concern for community" (Gordon Nembhard, 2014, p. 220).

The concept of the common good and co-operatives, brings 'open co-operatives' (or open co-operativism) into discussion. Open co-operatives are a form of multi-stakeholder co-operative, with an intention that they "produce Commons and are statutorily oriented towards the creation of the common good" (Bauwens & Kostakis, 2014, p. 358). Commons in this context can be defined as "common goods benefiting broader society which do not fall under the market exchange" (Lund & Novkovic, 2023, p. 545). An example used is that of Linux — an open-source operating system used in computing, developed by thousands of people working independently. That open-source code can be considered a digital commons.

Open co-operativism would see "co-operative accumulation, on behalf of the Commons and its contributors" (Bauwens & Kostakis, 2014, p. 359). These developments open questions on the nature of the relationship between members and their co-operative — including the extent to which they are traditionally transactional. On this, Lambert (1963) expresses a strong view:

> … in a co-operative society the member and the user are one and the same person. … the user in a consumer co-operative is the consumer or the buyer, but the user in a producer co-operative is the person who uses it most by virtue of the fact he works in it and earns his livelihood there, i.e. the worker-member … as a rule all the members must be users and all the users of a co-operative must become members. Exception can be allowed to this principle on condition that they are never more than temporary. (pp. 65-66)

Lambert (1963) notes, however, that Gide (1922) and Poisson (1925) take a broader view, with Gide (1922) pointing out that trade with non-members (in a consumer society) is a useful way of recruiting new members. But, Lambert, in his definition, also sees co-operatives serving both members and the community. He argues a co-operative does aim at furthering member interests "but only in so far as it may legitimately do so and only in so far as this is compatible with the general interest" (Lambert, 1963, p. 236). He makes the point that an aim of "transforming the word economic and social system" requires a co-operative to "serve its members and the community as a whole" (Lambert, 1963, p. 241).

It is perhaps easier to conceptualise a direct economic relationship where a member purchases from, works for, or supplies directly to the co-operative. The more tangible the product, the easier the understanding. The challenge is how well this traditional conceptualisation fits increasingly divergent and physically intangible forms of exchange.

There are of course dangers in taking a reductionist view of traditional co-operation. That co-operatives have been considered intergenerational suggests it has not been the case that all benefits must be readily realisable by current members.

The Author

Ian Adderley, a Chartered Secretary and Fellow of the Chartered Governance Institute, was called to the Bar in England and Wales in 2010 and has worked for the UK's Financial Conduct Authority in their role as the registering authority for mutual societies for over a decade. He is on the board of IUS Cooperativum, trustee and Vice Chair of the Co-operative Heritage Trust, and a trustee of the UK Society for Co-operative Studies — which he chaired for five years. He writes in a personal capacity, with views expressed not necessarily reflective of any of the organisations mentioned here.

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