JEOD JOURNAL OF ENTREPRENEURIAL AND ORGANIZATIONAL DIVERSITY

Volume 14, Issue 1 (2025) 1-22 | Published online 1 July 2025

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INVITED PAPER

Cooperatives: A Historical and Theoretical Perspective[1]

ABSTRACT

The history of cooperatives is often presented in two phases: first, as an immature initial phase characterized by failed utopian attempts, followed by a mature one, in which a more established status was obtained, allowing a progressive development. This narrative is too linear and evolutionist. So, I would like to suggest another history, influenced by Walter Benjamin's (1940) thesis, which is more attentive to discontinuities and invisible continuities. The international perspective taken here is absolutely not exhaustive: it includes Europe, North America, and South America, but not Africa, Asia, and Oceania, where there are many relevant experiences. So, the objective is only to participate in the formulation of new directions for research, taking into account a longer history, as well as a lot of emerging developments at the end of the 20th century and the beginning of the 21st. To do this, the text is divided into four parts: the first relocates the birth of the cooperative impulse in a multi-dimensional associationalism; the second recalls the forms of the autonomization and integration of cooperatives; the third underlines how new waves of cooperatives want to assume both transformative and reparative roles; and the fourth examines how the renewal of cooperative practices adds an impulse to the reframing of theoretical questions.

KEY-WORDS

SOCIAL ECONOMY, SOLIDARITY ECONOMY, SOCIAL AND SOLIDARITY ECONOMY, COOPERATIVES, ASSOCIATIONALISM

JEL Classification: P13, B15, B25, B52, F00, Z13 **| DOI:** http://dx.doi.org/10.5947/jeod.2025.001

[1] The argument contained in this paper has been abridged from Laville (2023a). This paper was presented at the "International Thematic Research Colloquium on Cooperatives" held in Trento on May 30-31, 2025. The event was organized by EURICSE, in collaboration with the International Cooperative Alliance Global Committee on Cooperative Research (ICA CCR), EMES International Research Network, CIRIEC International, and the University of Trento as part of the 2025 International Year of Cooperatives. For more information, see: https://euricse.eu/en/events/international-research-colloquium-on-cooperatives/ [Accessed: 19 June 2025].

1. A forgotten memory: cooperative roots in associationalism, an economic and political movement

Political economy is positioned as the project of an economy that guarantees the regulation of society. This approach dispenses with political deliberation, in the sense that realizing the interest of society as a whole is an "unintended consequence" of market activity (Smith, 2002[1759]: 184). Therefore, for economic liberalism, the conditions for prosperity do not depend on historical constructions but on a spontaneous blossoming of the "propensity to truck, barter, and exchange one thing for another" (Smith, 1904[1776]: 15). Smith expresses here a coherent anthropological vision that privileges the individual—an individual who can both assert his interests and who possesses moral inclinations in the form of sentiments that stem from neither discussion between political subjects nor a historical process.

In the first decades of the 19th century, Alexis de Tocqueville (1843: 118) wrote, "if men are to remain civilized or to become so, the art of associating together must grow and improve in the same ratio in which the equality of conditions is increased". Such voluntary cooperation suggests another political economy. In this associationalist approach, civil society could not be reduced to a system of needs, nor could it be isolated from the economy in an overly simplistic way. On the other hand, the public spheres of civil society needed to be strengthened in order to facilitate emancipation. Numerous associations were formed to demand that the political and economic spheres should have a clear influence on one another. Three variants of this general approach can be observed in social practices that emerged in diverse places.

1.1 The popular economy in South America

In South America, a popular economy remained alive for many centuries. The dominated cultures were never totally eradicated—rather, they survived through asymmetric and contradictory interrelationships with the dominant, colonial culture. Influences from America, Africa, and Europe mixed together, and the people concerned—from indigenous peoples to poor migrants and those of African descent—tried to initiate collective action for self-protection and emancipation. From 1830 onward, the concern for liberty and equality was taken up by popular groups in the form of mutual organizations. Popular economy was modified by political ideas derived from the democratic revolutions of the era, but expressed these ideas through local forms. In Colombia, for example, the Democratic Republican Society of Progressive Artisans and Laborers was created. In Brazil, slaves who escaped, or who were freed after the abolition of slavery, found themselves with no means of support and no prospect of employment. They resorted to economic survival strategies such as the collective seizure of land. These *quilombos* were extensions of the semiformal organizations through which they tried to deal with day-to-day problems (Nascimento, 1977). In Chile, a new form of popular entrepreneurship was developed by the *labradores* over almost 150 years, from 1700 to 1850, in agriculture and animal husbandry, preindustrial mining, forestry

operations, the small businesses run by women, and also in artisanal production. In 1854, "modern" forms of paid work only accounted for 0.1% of the general labor market. The *labradores* made up 20.8% of the labor force, and artisans a further 29%, 20% of whom were in the countryside. In the towns, small independent businesses were widely popular. Based on their domestic know-how, women provided people with diverse goods and services. In Santiago in the mid-19th century, more than half of the population was involved, in one way or another, in the popular industry established by artisans (made up of small factories, spinning mills, dye houses, and sheet metal and printing works). Later, those working in workshops acquired imported tools and joined together to form federated associations of entrepreneurs. Using local resources, they relied on community labor known as *la minga*, but also other forms such as la *natillera*, *el monte pío, el convite, la ayuda mutual comunitaria, la accion communal* (Moreno, 2001).

According to José Luis Coraggio (2006), this popular economy is above all a labor economy, which he distinguishes from the capitalist economy. It can only be examined via its basic building block—the household unit—and the concerns of its members. Indeed, the popular economy mobilizes different forms of activity that these members have available to them: self-production serving self-consumption, market production and sales, training, and community organization. Thinking about the popular economy in this way has theoretical implications; it changes our perceptions of the economy as a whole. It demonstrates the close relationship between domestic organization and market activities, which prevents the latter from being reduced to cognitive-instrumental rationality and supposedly universal utility maximization. It calls attention to the fact that the economy is not limited to material things but includes relational and symbolic dimensions that codetermine forms of production and distribution. More precisely, the relations internal to the popular economy are structured by interpersonal relationships in the family and the neighborhood. Despite its harshness and gender disparities, the popular economy could also be a source of dignity when it allowed individuals to develop collective solutions to their food, housing, and health problems. The popular economy is the product of particular places and historical circumstances, but it is also produced by its actors' everyday practices and political visions (Sarria Icaza and Tiriba, 2006). Among these visions were the reduction of dependency and the objective of emancipation. Achieving these goals meant applying economic logics to serve social ends while at the same time giving them new democratic substance.

1.2 North American protests against injustice

From the beginning of the 19th century, African Americans—most of whom were still enslaved—nonetheless succeeded in building their own institutions: small mutual aid groups promoting self-organization and civic virtue. Although modest, there were enough of them to ensure that their demands for slavery's abolition could no longer be ignored. These groups were supported by independent churches that raised funds that were then invested in the community. For example, in the mid-1820s, the African Methodist Episcopal Church, founded by Richard

Allen in 1816, had more than 1,000 members. The church not only supported its most destitute or needy members, but it also provided startup capital to help small entrepreneurs. It became a seat of protest, providing African Americans with increased confidence in their capacity to mobilize and in their collective strength, expressed in written petitions. Almost a century later, this stance led Allen and William Edward Burghardt Du Bois to conclude that this church—where religious and economic activities always had a political dimension—was one of the greatest Black organizations in the world (George, 1973). As African American churches published newspapers and set up national antiracist conventions, they were transformed into spaces of struggle against continuing discrimination (Brooks-Higginbotham, 1990). They promoted a vision of gradual and peaceful social change, challenged the idea of armed struggle, and sought a political solution to injustice. Women, however, were kept away from the public sphere through an established separation between the domestic and political domains. Instead, by "creating institutions that provided education, vocational training, and moral guidance to the poor, women volunteers constructed a private system of public welfare" (Ryan, 1992: 279). They were less reluctant than men to seek government funding, even soliciting help from local councils and public authorities for this purpose. Progressively, the women gained a reputation as effective administrators of public services (Ryan, 1990) and influenced policies through a variety of means, including public meetings, petitions, and lobbying (Clemens, 1993).

1.3 European labor movements

In England, as Edward P. Thompson (1966: 193) wrote, the labor movement was mainly composed of domestic workers and, in many towns, of "shoemakers, weavers, saddlers and harness-makers, booksellers, printers, building workers, small tradesmen, and the like." Radical London emerged "from the host of smaller trades and occupations," rather than "heavy industry." In fact, "the factory hands, far from being the eldest children of the Industrial Revolution, were late arrivals." The production sites, although varied in nature, were places where political views were discussed. As Thelwall writes, each workplace was "a sort of political society which no act of parliament could silence and no magistrate disperse" (Thelwall, 1796, cited by Thompson, 1966: 185). Workers, craftsmen, and radical laborers kept up their own traditions while at the same time establishing links with the illegal Jacobin movement. The workers' main inspiration came from a belief in the transformative power of reason and the "Socratic spirit"—that is, in every individual's capacity for self-improvement. Equality was the benchmark that made any distinction of status unacceptable. As the mutinous sailors from HMS Hermione declared in 1797, they had long sought to become human beings; they had now become so, and they wanted to be treated as such. Friendly societies were emblematic of this self-organization and practical ethic: they provided financial cover for clerical workers, small traders, and factory workers against illness, unemployment, and death-related expenses. In 1773, they were estimated to have 648,000 members, which had increased to 925,000 by 1815.

The idea of an extension of politics to the economy could also be found in France. As Claude Anthime Corbon stated in 1840, "democracy in the political system and near-absolute monarchy in the workshop are two things that cannot coexist for long" (cited by Chanial and Laville, 2005: 54). During the 1830s, the meaning of the political was reexamined in direct relation to social inequality. For workers, "equality before the law can only become effective if the right to earn a living is guaranteed" (Gossez, 1967: 195). The elites responded by suggesting that a political domain limited to the right of assembly and the right to vote should be established in exchange for the surveillance of associations, which started from 1834. But demands that had previously remained underground were brought to light by the 1848 revolutions. In February and March of that year, a number of decisions were quickly made regarding the right to work, the abolition of the death penalty and slavery, and freedoms of the press, of assembly, and of association. The term "association" referred to a large diversity of collectivities: former guilds became mutual aid, solidarity, mutual credit, or simply fraternal societies, whose immediate objective was to fight against the most glaring inequalities and the most hated forms of exploitation.

Other examples can be cited apart from England and France, such as Spain, where 1836 legislation against guilds did not prevent the nascent labor movement from creating groups rooted in the trades. Thus, mutual aid societies came into being in 1841. By 1887, there were 664 of them, and in 1904 they numbered 1,271, with 238,351 members. The mutual aid societies were combined with other forms of advocacy in multi-functional associative initiatives. Little by little, a patchwork of collective entities was established that borrowed from the popular economy but also demonstrated a desire for independence and collective pride. Jordi Estivill (2015: 356) conveys the richness and diversity of this patchwork when describing its different elements, among which were "mutual assistance with sowing and harvesting, the non-monetary exchange of goods and services, collective work on common property (cutting timber, the development of land, the maintenance of paths and bridges, irrigation, fishing zones)". There were also networks of associations offering educational and recreational activities (*ateneos populares*) (Sola, 1978), rationalist circles, courses for adults, conferences, public debates, libraries, community sports groups, choirs, brass bands and music groups, republican brotherhoods, popular theaters, and cafes. According to historical surveys of Portugal, this was true across the entire Iberian Peninsula (Melo, 2005).

In differing configurations on each continent, this pioneering associationalism was characterized by a dual embeddedness: in the political sphere, as a collective form of expression and claim-making; and in the economic sphere, as the impetus behind new forms of work organization and production. It was based on mutual help and cooperative behavior among free and equal citizens who together defined solidarity and who expressed philanthropy through self-organization. This associationalism fought against an economic system that reinforced inequalities. As part of a movement that was inseparable from democratic progress, associationalism refused to allow birth to confer any privileges, remaining adamant in its demand for real equality. In this way, associationalism suggested another way of instituting the economy at a time when the foundations of capitalism were not yet fully established. Associations defending the rights of women, minorities, and workers were all fundamentally opposed to the idea of a self-regulating market.

2. The institutionalization of cooperatives: from repression to a partial recognition

In the 19th century, after "the age of revolution" came "the age of capital," to quote Eric Hobsbawm (1962; 1975). During the 1870s, neoclassical economics put forward the concepts of marginal utility and general equilibrium, and questions of values were excluded from the field of economic science. The narrative of modernization equated economic development with market expansion and capital enterprise. This historically unnuanced position was not unique to liberalism. Marxist references to a unified working class also made people forget that popular routes toward social and labor-market integration had been diverse.

2.1 Negative discrimination against self-organization

In his seminal work, José Carlos Mariátegui (1979) accused Western Marxism of having contributed to the pessimism that condemned the popular economy in South America. Quijano's deconstruction of "coloniality" takes up this criticism, arguing that the productivist ideology underlies both liberalism and historical materialism. The latter, according to him, constitutes "the most Eurocentric version of Marx's heritage," a result of the "hybridization of his theoretical propositions with positivist evolutionism and dualism, along with the Hegelian idea of a historical macro-subject" (Quijano, 2007: 160). The consequences have been deeply damaging: the differentiation of social activities has been pushed to the extreme of reifying categories such as economy, society, culture, and politics; private property and exploitation have been absolutized, as if they alone embody oppression. Furthermore, the uniformity of the capitalist mode of production has been accepted, whereas in reality it constituted more of an "articulation of all other modes of production" (Quijano, 2007: 159; also see Quijano, 1998). When capitalism came to stand for the idea of a modern economy, alternative economies became archaic, backward, or invisible.

In the United States, the 1830s and 1840s were among the most violent decades of American history. Howard Zinn (1980) evokes for this period the term "civil war". Murders and atrocities, coupled with the infiltration of movements and the violation of freedoms, sometimes led to radicalization. This was the case for the part of the Black movement that opted for civil disobedience. One of the best-known figures of the activism that began to emerge during the 1840s was Frederick Douglass. The Black movement put social justice before respect for the law by protecting and helping runaway slaves. Persecution led to a split among the abolitionists between those who supported the use of violence and those who continued to condemn it. The growing gap between the political cultures of the North, where a diversity of associations flourished, and of the South, governed only by representatives from the white male population, led in 1861 to the American Civil War.

After the Spring of Peoples in 1848, governments reacted harshly in Europe. In the writings of John and Barbara Hammond, the expression "civil war" is also used in relation to 19th-century England. Like Zinn, they want to acknowledge the violence of the clashes. According to Thompson (1966: 194), the making of the working class "was not the spontaneous generation of the factory

system. Nor should we think of an external force—the 'industrial revolution'—working upon some nondescript, undifferentiated raw material of humanity, and turning it out at the other end as a 'fresh race of beings.' The changing productive relations and working conditions of the Industrial Revolution were imposed, not upon raw material, but upon the free-born Englishman," the creator of "self-conscious working-class institutions, trade unions, friendly societies, educational and religious movements, political organizations, periodicals." The repression of these institutions worsened during the Industrial Revolution.

Under these conditions of repression, popular radicalism was revived on a number of occasions. In 1811, Luddism appeared; its attempts to destroy machines crystallized the revolt against the advent of the industrial system and laissez-faire politics. According to Hobsbawm (1962), this negotiation by riot was less a rejection of technical progress than a struggle against unemployment and for the preservation of living standards, including "nonmonetary factors such as freedom and dignity." Later, protest journalism and trade unionism spread, followed by the ten-hour-day movement, the 1831 revolutionary crisis, and various movements leading to Chartism. This activity was sustained until the end of the 19th century, but then tailed off to make way for a form of socialism that "shifted emphasis from political to economic rights" (Thompson, 1966: 183). It was really the transversality of actions—both political and economic—that was lost over time, as different forms of social action became differentiated.

2.2 A separation between different organizations

The repression occurring in the different continents considered here was interspersed with partial recognition. The multiple types of workers' associations would be granted separate statuses, among them cooperatives, which became part of the market economy and were engaged in sectors of activity with low capital intensity. Cooperatives allowed different actors to mobilize resources for activities that had been neglected by investors. While agricultural cooperatives, for instance, sprang up everywhere—taking off in Brazil in particular—other types of cooperatives became more established in certain national contexts: in England, for example, consumer and housing cooperatives gained a particularly strong foothold. In countries with less rapid industrialization, such as France, cooperatives were regarded as a specific type of commercial company and were increasingly delegitimized in the workers' movement. The French labor movement was linked to both republicanism and associations up until the Third Republic (Moss, 1976). Referring to what he calls "the socialism of skilled workers," Bernard H. Moss (1976: 156) underlines the artisanal nature of the organized urban working class until after 1900. Industrialization sufficiently disrupted the security and income of many artisans to provoke their protests, but it did not destroy their resistance. Despite their relative proletarianization, most activists kept the trades they had learned through apprenticeship, which contributed to worker control and solidarity. They had the professional and organizational capacity to resist exploitation and propose an alternative to capitalism. Two strategies followed, one after the other. The first was the federative socialism advocated by Paul Brousse,

Benoît Malon, and Eugène Fournière. This empathized with worker cooperatives and mutuals, while counting on trade unionism, public services, and local politics, as well as on an alliance with republicans and middle-class reformers. Disillusionment with social reforms then led to the development of a different strategy: that of revolutionary trade unionism, fighting for immediate change but also planning the complete emancipation of the working class through the expropriation of the capitalist class. The cooperative option was no longer considered relevant (Moss, 1976).

Division between working class initiatives thus affected associations, cooperatives, and mutuals alike. In the United Kingdom, this occurred to the extent that the idea of a common belonging became unthinkable. Associations were seen as charitable organizations, whereas cooperatives and mutuals were regarded as spearheads of the labor movement. In fact, the latter experienced an upturn in the first half of the 20th century. In the United Kingdom, despite the repression described earlier, they reached their peak between 1890 and 1910. However, they remained the preserve of craftsmen and failed to reach poorer workers and women, despite the existence of the Women's Cooperative Guild. They proved crucial to the rise of the Labour Party and the unions, but both of these formations later left their local roots behind.

2.3 A hostile institutional framework

The space gained by cooperatives was real, but limited due to reductionisms at different levels.

The first level corresponds to the separation of the political sphere from the economic sphere, which is equated to a self-regulated market. Considering the market as self-regulating—i.e., as the mechanism for aligning supply and demand through prices—led to the institutional changes that were necessary for its emergence being overlooked and to the institutional structures that make it possible being forgotten. Explaining the market by an appeal to utility maximization in a situation of scarcity masks the fact that it is an instituted process.

A second level is the identification of the modern enterprise with the capitalist enterprise. The joint-stock company provides the means for an unprecedented concentration of capital, since property rights can be exchanged without their holders needing to know each other. The mediation of the stock exchange also guarantees the liquidity of stockholders' assets.

In contemporary societies, the market and capitalism are thus in league with one another, since it is the complementarity between the self-regulating market and capitalist enterprise that creates the system. Finally, when the economy is treated as the combination of the self-regulating market and the capitalist company, room is made for another development: the project of a society rooted in the workings of its own economy.

The third level concerns how philanthropic solidarity increasingly referred to benevolence from the rich towards the poor. The humanist spring of philanthropy was gradually reduced to paternalism and patronage, as invoked by Liberals like Frédéric Bastiat. It was a way of increasing individual responsibility, since—as everyone was affected by the behavior of others—they all had a personal interest in promoting good deeds: "all benefit from the progress of each individual, each

individual benefits from the progress of all . . . solidarity is therefore, like responsibility, a progressive force, beautifully designed to limit evil and promote good" (Bastiat, 1862-1864: 411, 622, 626). Bastiat agreed with Thomas Malthus and David Ricardo, for whom solidarity resulted from the aggregation of individual responsibilities and was effective only because it was voluntary. From this time onward, the philanthropic version of solidarity was based on this individualistic conception. It promoted the creation of mutual aid societies insofar as they could educate the most deserving workers to plan and save. Associations were only justifiable as groups that brought individuals together to develop their sense of responsibility, but they became reprehensible when they turned into a force for social change. This is why associations had to be placed under the control of social elites who could protect them from being hijacked for subversive purposes.

Consequently, the positive discrimination towards this reformulated philanthropic solidarity had a counterpart: the negative discrimination against democratic solidarity, viewed as the risk of disorder and revolt. As Thompson argues, the moral economy of workers based on self-organization had to be invalidated to open the way to the moralization of the poor.

In this ideological context, cooperatives were subject to competition and succumbed to normative and mimetic institutional isomorphism (Di Maggio and Powell, 1993). As a result, the general logic of concentration of the means of production forced them to specialize in one core activity related to their members' identity. Concerns about survival weakened their broader project, and this transformation continued to the point where they became "veritable financial groups that gradually emerged as the cooperative institution typical of developed capitalist economies" (Vienney, 1982: 108).

3. New waves of cooperatives

The "new" social movements beginning in the 1960s generated a crisis previous to the economic crisis. Some of them questioned how private companies organized themselves and criticized the absence of opportunities for their workers to have a say. This exploitation of workers in the production process was not compensated for by their admission into consumer society. The lack of direct employee involvement in all aspects of the organization of work was coupled with passivity on the part of consumers, with the critique being extended to consumption and lifestyles. Behind the recognized benefits of access to goods, the limitations of the market system were underlined by ecologist, feminist, and anti-colonial arguments.

3.1 Voluntary collectives reactivating the cooperative movement

Alternative enterprises originated in the imaginary projects of alternative societies (Desroche, 1976), emerging through an "associationalist" ideology that reflected some of the aspirations expressed in the previous century. These enterprises aimed to prefigure an alternative economy

capable of uniting what contemporary society divides (Vienney, 1980). But just as the alternative society was confronted with the challenge of individualistic behavior, so did it have to confront the harshness of competition. The emphasis on equal pay and mutual participation could not drown out the issue of low wages and long working hours (Sainsaulieu, Tixier and Marty, 1983). The failure rate of alternative enterprises was high. The majority of groups that subverted the mainstream notions of work and employment disappeared. Those that persisted devoted themselves to a more limited objective: empowering their members within collectively managed economic entities. They often chose a cooperative status as suitable for establishing and managing companies controlled by their employees.

It was under this movement's impetus that the cooperative labor movement in many countries opened up to the provision of intellectual and cultural services. In 1985, these service cooperatives accounted for 45% of worker cooperatives and 32% of jobs in the service sector in the United Kingdom, 13.5% of cooperatives in Quebec, and 18.1% of cooperatives and 6.5% of service sector jobs in France. They gained access to niche markets thanks to the fact that their managers were already embedded in political and social networks. In the area of training, consulting, technical studies, media, arts, and leisure, small groups of young graduates—often united by previous work experience in companies where they learned about customer relations—contributed to an increase in the number of new cooperatives and a reduction in their average size. Brazil was also affected by "a strong associationalist movement among highly skilled workers and professionals, especially in the health sector," with, for example, "more than 100 medical service cooperatives at the end of the 1970s, nearly 15,000 affiliated doctors, 900 hospitals and 1,500 laboratories meeting the needs of more than 4 million users" (Benevides Pinho, 1979: 42-56).

Some of these new cooperatives did not escape institutional isomorphism. In the 1970s, the collective entrepreneurs who created the first worker cooperatives prefigured a rehabilitation of the enterprise that would assert itself over the next decade. The new cooperatives formed part of a landscape of production in which different types of employee participation and profit-sharing proliferated. This is illustrated by the example of the United States, where 1,200 small businesses—including cooperatives—are companies where workers hold the majority of the capital and where shares are relatively equally distributed. These small businesses employ an estimated 15,000 people. Many of them have been created since the 1970s, though some are older. However, it can be difficult to discern cooperatives and participative small businesses amongst the mass of companies that have a wide range of financial participation programs, involving more than 40 million employees. Collectives strongly committed to equality get lost in a sea of employee equity participation, whose aim is to increase employees' identification with their company. In short, the desire for self-management and alternative ways of living and working was unable to escape a gradual dilution. This desire was fueled by the social upheaval that came in the wake of the May 1968 protests.

But since the early 1980s, radical critiques of the concentration of power, of the specialization of social functions, and of the red tape around delegation procedures have waned. They are no longer present at a grassroots level, where the difficulties and ambiguities faced by collectives isolated in an unfavorable environment have increased.

Nevertheless, these new voluntary cooperatives raised important issues beyond their own bounds. Firstly, they implemented forms of direct democracy rather than contenting themselves with the forms of representative democracy guaranteed in cooperative statutes. Secondly, the question of the ends of production, which was not considered by the earlier cooperative movement, linked back to questions about the means by which production is achieved. The egalitarianism advocated in the organization of work and day-to-day operations is considered the best guarantee that production collectives' economic means will converge with their social and environmental ends.

The main contribution of these collectives lies in the fact that they are not focused solely on their internal operations but aim to have a wider impact on society by positing a link between the self-organization of work and a broader democratization. They are also committed to reducing inequalities via the goods and services they offer. Consulting and training cooperatives aim to make the knowledge that is usually the monopoly of experts available to as many people as possible, in order to combat what de Certeau (1980) calls the abuse of knowledge. This social engagement is often accompanied by environmental awareness. This is demonstrated by the relations between ecological movements and renewable energy cooperatives or cooperatives selling organic products. While they may not have given shape to an alternative economy, the production collectives that multiplied in the 1970s did open up new areas of transformation. In the years that followed, their efforts moved into the background as the restructuring of production began to take effect. But this effervescence was not just a passing phenomenon. Although the challenge it left behind was covered over by the neoliberal wave, it would nonetheless influence later initiatives—hybrid products of the impulse toward self-management and the fight for jobs.

3.2 Worker takeovers and reluctant entrepreneurs

After its revival rooted in alternative ideology, the cooperative movement was deeply affected by another wave of cooperatives, which this time emerged out of necessity rather than choice: company takeovers created by "reluctant entrepreneurs" (Paton, 1989). In Italy, we can identify around 1,000 takeovers before 1985, although the statistics are somewhat imprecise. These mostly occurred in the north of the country and involved companies in the textile and clothing, printing, light engineering, wood, and transport sectors, affecting an average of 30 to 100 employees. In Spain, takeovers saw companies restructured not only as cooperatives but also as public limited-liability companies whose employees were the majority shareholders. Their precise number is not known, but it was at least 1,300, accounting for 50,000 jobs in the last decades of the 20th century (Garcia Jané, 2009). In France, between 1978 and 1983—a period in which the cooperative movement expanded—takeovers accounted for between 37% and 61% of all new jobs created by cooperatives, depending on the year.

Worker takeovers were also happening in South American countries affected by plant closures—occurring as part of the strategic reorientation of multinationals—but with additional difficulties. Many of the companies concerned suffered from undercapitalization and technological obsolescence, for example, in traditional industries such as textiles and footwear. However, their economic problems were accompanied by a particular social enthusiasm, from which workers' control drew reference. Without solving the problems, this reference gave a distinctive dynamic to these "recovered companies," as they are known in Argentina—one of the countries where the phenomenon is most prevalent (see, among others, Magnani, 2003; Rizza and Sermasi, 2008). While in Europe, takeovers replaced the credo of self-management with the sole aim of safeguarding jobs, in South America, they were inseparable from memories of earlier experiments in self-management. This is borne out by some emblematic examples, such as the Catense cooperative and its 12,000 worker-members in the sugar cane industry so crucial to the economy of northeastern Brazil. There was clear trade union involvement in this phenomenon of workers taking over companies that had been abandoned by their former owners.

Worker takeovers were also part of the spread of democracy in South America, a continent that had long been under the yoke of authoritarian regimes. As a result, self-management and worker takeovers were more likely to merge than occur sequentially, like in Europe. However, this period of worker takeovers through necessity did not exclude the possibility of these recovered companies being overvalued, which could lead to disillusionment. Emphasis was placed on these companies in the policies of the State of Rio Grande do Sul in Brazil, highlighting an industrialist inclination on the part of those public officials who made self-management the "conceptual basis" of their program (Sarria Icaza, 2005). The corollary of this preference was a lack of interest in many other collective initiatives in services and small businesses. It raised the whole question of the relationship with a popular economy with strong roots in family and community, especially as the latter grew due to the unfulfilled promises of job creation by companies in the private sector.

3.3 Popular cooperatives coming from the informal economy

Like in Rio Grande do Sul, takeovers in the name of self-management were sometimes seen in South America as an expression of a workers' vanguard. But they could also be seen as the submerged portion of a much bigger set of grassroots activities. While the concept of the informal sector (Hart, 1973) was initially intended to designate an economy ignored by public decision-makers, it has gradually gained a pejorative connotation, coming to be defined by three criteria: small size, noncompliance with legislation, and "non-capitalist production methods" (Lautier, 2006: 210). Yet, the informal economy—which, according to estimates for Latin America, serves as a refuge for 35% of the working population—is a heterogeneous whole. One part is composed of market activities linked to capitalist companies' outsourcing strategies, not to mention illegal trafficking, sometimes accompanied by extreme violence. But another part is a grassroots response to a difficult economic situation. It is based on the domestic unit: a group of people who interact on a daily, regular, and

permanent basis in order to achieve the objectives of reproducing and protecting life by carrying out activities—economic or otherwise—that are essential for improving their lives (Hillenkamp and Laville, 2013).

Starting from this kind of comprehensive approach, José Luis Coraggio, Aníbal Quijano, Luis Razeto, and Boaventura de Sousa Santos's work focuses on extensions that are able to transfer the habits rooted in the domestic sphere onto a broader and more egalitarian basis. As such, these habits become the source of cooperative relationships that address inequalities. These authors no longer restrict the popular economy to dependence on capitalism or the market. Based on mutual aid and common ownership of the means of production, these grassroots associations include: production workshops; organizations of unemployed people coming together to seek employment; community food groups, including collective kitchens and vegetable gardens; organizations dedicated to issues related to housing, electricity, and drinking water; pre-cooperative self-build organizations; and community services in the areas of health and culture. These cooperatives come from the community and are not created by the subcontracting of capitalist entities.

Studies conducted throughout Chile show that, at the end of the 20th century, the popular economy accounted for almost half of the working population. Initiatives also exist in Argentina, Bolivia, Brazil, Ecuador, Mexico, Peru, and Uruguay. They are based on Black and Indigenous movements (Alvarez, Dagnino and Escobar, 1998; Hillenkamp, 2009), such as in the Andean countries, where Indigenous principles of organization were reactivated to generate original models of development. In Colombia, as in other countries, one of the most illustrative examples is that of waste recycling cooperatives. Nearly 300,000 people, or 1% of the population, live off waste picking, including 50,000 in Bogotá. These people are victims of the official and unofficial intermediaries to whom they sell the waste and also of the contempt of the public, who equate them with the waste they collect from the street. The creation of cooperatives in 1987 was a reaction to this ostracism. Its purpose was to combat actor dispersion and head-to-head competition with intermediaries through an economic organization that would create a more favorable balance of power. It also sought to combat exclusion through a social, political, and cultural arrangement that provided access to rights. The year 1990 saw the formation of the Recyclers' Association of Bogotá and, at a regional level, the North Coast Association. In 1991, the National Recyclers' Association was established, bringing together 88 of the country's 94 cooperatives, representing 10% of the people who lived from waste picking. In recycling cooperatives, the workers' status as employees enables them to access social security and insurance. These gains—like their integration into a collective, which is materialized in the uniform they wear—lead to improvements in both their living and working conditions, helping them escape from a true social apartheid.

Another typical example is that of the Landless Workers' Movement (*Movimento dos Trabalhadores Rurais Sem Terra*, or MST) in Brazil, established in 1984. In 2000, 250,000 families reclaimed unoccupied land. Some 50 agricultural and livestock production cooperatives were set up to compensate for the lack of resources. These bring together 2,300 families, and around 30 service cooperatives benefit a further 12,000 families. At the same time, hundreds of producer associations

are able to receive loans. There are 1,800 elementary schools, with 3,800 teachers and 150,000 students, 1,200 youth educators, and 250 nurseries. In the second decade of the 21st century, the cooperatives of the MST became the first producers of organic rice in South America. They have also been the subject of detailed evaluation, showing that the cooperatives nonetheless have to overcome many obstacles. These include the traditional individualism of the sector in which they operate; the division of responsibilities with nongovernmental organizations, whose support is essential but whose involvement is sometimes perceived as interference by members; and confrontation with the privatization of the informal sector, which offers opportunities yet at the same time favors larger companies.

It is clear that attention is now being paid to the foundations of the popular economy. This attention is evidence of the popular economy's legitimization and puts pressure on public policy to accord it its rightful place. An ecosystem of support has been initiated. Academic networks have been established in several countries to provide guidance and act as incubators of solidarity, and nongovernmental organizations are now both more aware of the subject and actively involved. Changes have occurred in Peru, Mexico, Argentina, Colombia, and Uruguay, but Brazil is undoubtedly the best example of the progress that has been made. Since 1980, Caritas has financed thousands of "alternative community projects," and, in 1999, the Unified Workers' Central (*Central Única dos Trabalhadores*), commonly known as CUT, became deeply involved through its Solidarity Development Agency (ADS). Providing training and information for trade unionists and cooperatives, this agency was set up in partnership with Unitrabalho, which brings together more than 80 universities. This foundation is also one of the originators of the Incubadora Tecnológica de Cooperativas Populares (ITCP), which helps to establish cooperatives and associated production groups (Cunha Dubeux, 2004). These examples are very different, but they both show the link between economics and politics.

According to Hirschman (1971), in Latin America's popular economic initiatives, the struggle to improve members' living standards is intrinsically linked to the fight for citizenship rights. It oscillates between making general demands and dealing with the problems of individuals, and does not separate material issues from those of living standards and fellowship. Many women's groups protest against the scandal of establishing an opposition between public and private. According to these groups, imposing a division between production and reproduction (Federici, 2019) assigns them to unpaid activities for two-thirds of their working hours, while men are paid for two-thirds of their working hours. In the past, women's confinement to an unrecognized domestic economy explained their physical and symbolic underrepresentation in the public sphere. The fact that they constitute a majority in popular initiatives is due to their belief that these collective approaches are able to identify and contextualize their needs, express them, and bring them into the public sphere. Community or care cooperatives are tools for publicizing questions previously considered private. Faced with a dearth of universalist measures, these initiatives are a means of enforcing rights and translating them into the capacity to act; they bring together a collective that is a resource for developing self-confidence, for relieving the burden of responsibilities assumed in the family sphere,

and for reconciling these responsibilities with a commitment to social justice. These collective actions are intended to be pragmatic responses to everyday problems, but they also formulate social and environmental demands. This creates a link with eco-feminism, which confronts a materialistic and economistic concept of wealth that assimilates domestic knowledge to "innate" qualities, to "altruism," and to female "duties."

4. From new practices to a reframed theoretical debate

Cooperatives are non-capitalist organizations. Their legal status offers no advantage to particular individuals in terms of either decision-making or the redistribution of surpluses. Limiting the distribution of profits and the power of capital providers, cooperatives present a relatively invariant combination of an enterprise and an association of persons. That is why they are the core of the social economy approach. The contribution of this notion of the social economy is indisputable: it points to a set of activities broader than the nonprofit sector, in a context where collective entrepreneurship in civil society makes use of both cooperative and associative statuses. Social economy also helps to build bridges between these legal forms. Moreover, the role played by the social economy has the potential to grow in the current economic climate because its organizations are partially resistant to financialization, precisely because they are not required to maximize the return on investment for shareholders. The social economy also demonstrates that, through the creation of trust relationships, the nonprofit constraint can be replaced by other organizational characteristics: the definition of a shared objective, the participation of members on the basis of legal equality, and the mobilization of a network. The social economy replaces shareholders with stakeholders.

But, as history shows, this organizational perspective is not sufficient to resist institutional isomorphism. The logic of reaction against the effects of capitalism, which explains the birth of social economy entities, is fading in favor of a logic of functional adaptation to this mode of production. In the areas where competition is fiercest—such as banking and insurance—large cooperative enterprises are almost conflated with large noncooperative enterprises (Malo, 2002), or they adopt economic behavior that is fairly close to that of companies in the traditional private sector (CIRIEC, 2000).

4.1 New cooperatives: diversification of practices and conceptual questions

The new waves of cooperatives have created a diversification of legal forms. In Italy, for example, social solidarity cooperatives emerged due to the fact that the economic activities that their founders wished to engage in were not admissible within the status of association. Project leaders chose the cooperative because it favored participation and conferred enterprise status without being taxed on undistributed profits. At the outset, these experiments came up against a contradiction: the 1948

law on cooperatives restricted their activity to that which benefited members, while the country's constitution allowed them to have broader social aims. The law passed in 1991 overcame this contradiction: it stipulated that "social" cooperatives intervene "in the community's general interest and to promote the social integration of citizens." While cooperatives had previously relied on the initiative of a single social group—workers or consumers, for example—founding groups have become more heterogeneous. For the first time, cooperatives could have voluntary members, as long as their number did not exceed half of that of the other members: workers, users, and legal entities (among which might be public bodies).

New cooperative forms were inspired by the Italian experience of social solidarity cooperation, extending cooperation beyond the collective interest of members to which it was previously confined. After Italy's new law in 1991, France, Portugal, Québec, Spain, and Sweden all ratified the possibility of constituting social or collective-interest cooperatives in which users, employees, and volunteers could all be included. These social cooperatives are thus based on multi-membership; that is, they have different categories of members, whose relations are governed by legal equality. In contrast to capitalist enterprises that mobilize a discourse about "stakeholders" while subjecting them to a strong hierarchy because they are not shareholders, stakeholders here are transformed into co-decision makers and promoted to the rank of members. The driving force behind founding members' commitment is the pursuit of benefits for the collectivity, which are not side effects of economic activity but rather intentional goals (Laville and Nyssens, 2001). Thus, in organic farming, renewable energy, and economic integration, environmental and social costs externalized by other enterprises are internalized. The ends chosen by these actors lead them to take on functions that are otherwise neglected, such as maintaining local heritage, environmental protection, or the integration of people experiencing hardship into employment. In fair trade, solidarity finance, and solidarity-based services, respect for the criteria of social justice and accessibility of services are considered essential.

The activity of these initiatives is not conceived based on a preexisting common identity but rather through collective reflection that helps define it. The appropriate means for achieving the desired ends consist of stakeholders coming together to clarify the details of supply and demand. This is also relevant for organizing care services such as childcare cooperatives. In Sweden, 15% of preschool children are cared for in non-public daycare centers. The majority are parent cooperatives, but some are worker cooperatives or have the legal status of associations (Pestoff, 2004). In this context, cooperatives have been just as involved in restructuring existing services as they have been in the creation of new services. The "cooperatization" (Lorendahl, 1997) of social services was primarily aimed at expanding the role of users, such as parents, in organizing their children's care. It was permitted because of financial pressures on the public sector. Cooperatization is, in a certain way, an alternative to privatization in periods of pressure on public finances. It also diversifies the links between different statuses that historically have been separated, in particular those of associations and cooperatives. Various initiatives born as associations have developed into cooperatives, initiating what is now known as "social" cooperation.

Moreover, as underlined by solidarity economy theory, resistance to isomorphism depends on two factors not problematized by traditional social economy theory: challenging economics and reaffirming a public dimension in cooperative initiatives.

4.2 Challenging economics

In Karl Polanyi's view, the term "economic"—that we commonly use to designate a certain kind of human activity—oscillates between two poles of meaning. The first meaning—the formal one—stems from the relation between ends and means imposed by the problem of scarcity. The second meaning—the substantive one—emphasizes the relations and interdependencies between human beings and non-human beings, integrating these elements as constitutive of the economy. This distinction between one definition of the economic that refers to scarcity and another that takes into account the relation between people and their environment was noted in the posthumous publication of the principles of Carl Menger (1923: 77), the originator of neoclassical economics. He suggested two complementary directions for economics: one was based on the need to economize in order to respond to an insufficiency of means; the other, which he called the "techno-economic direction," followed from the physical demands of production without reference to the abundance or insufficiency of means. In his view, these two possible orientations of political economy derive from "essentially different sources" and are "both primary and elementary". This discussion has been forgotten and is not taken up in any existing presentation of neoclassical economics, since the findings of Menger's price theory encouraged his successors to focus on the first, more formal definition. Polanyi suggests that this narrowing of the field of economic thought provoked a complete rupture between economics and everyday life, a suggestion expanded on by economists anxious to reflect epistemologically on their science (Laville, 2023b).

It is helpful to return to the other meaning that Polanyi highlighted. This substantive meaning is derived from man's dependence on nature and his fellows, an interchange between his natural and social environment (Polanyi, 1957). Four different points can be distinguished in this definition: the reference to materiality, the interaction between people and with nature, the instituted process through which the real economy takes shape, and the plurality of economic principles.

On the first point, the substantive conception attaches too much importance to the materiality of production. This insistence, which is historically explicable, is no longer tenable in contemporary economies where immaterial production is continually expanding. The substantive definition can only be preserved if it frees itself from placing so much weight on materiality; this definition can be defended on the condition that it does not assimilate livelihood and survival and that it includes the pursuit of a "good life." It is thus possible to define economic activity as a human activity of producing and distributing wealth that helps realize individual *and* collective objectives.

On the second point, interactions among humans—and between humans and non-human beings—imply that the economy cannot be an isolable sphere. Economic activity involves an expenditure of energy but also social interdependence that give it a horizon of meaning and

understanding. Meanwhile, interdependence with nature compels it to care about environmental and energy-related matters.

This brings us to the third point: that the economy is embedded within an institutional framework. Contrary to the idea of the self-regulated market, it is important to acknowledge that its emergence and existence depend on social institutions.

The fourth point, and a logical consequence of the third, is the existence of a plurality of economic principles. There is not only the market, but also reciprocity, redistribution, and householding. Reciprocity and redistribution have both withstood attempts to reduce the economy to the market. Redistribution is the principle according to which production is assigned to a central authority, which has responsibility for sharing it out. Reciprocity corresponds to the relationship established between groups or individuals through allocations that only have meaning insofar as they stem from a desire to demonstrate a social link between stakeholders. Reciprocity and redistribution are not solely found in pre-modern societies; these principles exist in contemporary societies. Reciprocity is exhibited in the first place within a partly non-monetary "ground floor economy," in the absence of which the other floors could not be constructed. This is also the sphere of householding, without which no other production would be possible. Reciprocity and householding make visible a part of the economy kept invisible in an orthodox economics which neglects reproduction processes (Verschuur, Guerin and Hillenkamp, 2021).

To examine cooperatives through a substantive perspective, including the plurality of economic principles and their hybridization, provides a richer picture than merely focusing on the market economy.

4.3 Reaffirming a political dimension

In studies of the social economy, democracy is too quickly assimilated to collective ownership, without any examination of the practices capable of propping up the legal arrangements. The question of praxis—that is, of collective acts of participation—is dodged. The conflation of members' formal equality, on the one hand, and democracy in decision-making processes, on the other, has proved harmful. All sociological and socioeconomic studies emphasize that equality in law, no matter what capital is possessed, does not mean democracy in practice. Besides, the claim that legal status alone guarantees internal democracy can hamper recognition of the divergence of logics, the representation of different groups, the establishment of checks and balances, and the search for ways of organizing work and work-related social conditions more favorable to employees. The distinction between being on equal footing in legal status and practicing internal democracy opens up a new line of investigation. Rather than equating the legal equality of members to democratic functioning, we should ask under what conditions this legal equality translates into a democratization of internal functioning. Instead of assuming that social economy organizations have solved the problem, we should ask about the mechanisms put in place so that a process of democratic decision-making can be realized within them. There is a cooperative trilemma: "cooperatives must not only respond to

the demands set by the economic market . . . they must also take into account the interests and needs of civil society while positioning themselves in relation to public systems of regulations that were born in our welfare states" (Gijselinckx, Develtère and Raymackers, 2005: 79).

Consequently, to understand whether social economy organizations are truly democratic, we cannot look only at how they function internally. What also matters is the variety of ways in which they contribute to institutional change. The current crisis of representation is accompanied by forms of public engagement that reflect a civic desire to improve everyday life. In these micro-public spheres, forms of economic activity are being developed that result from civic participation, clearly in reaction to the grip of the market. But they can only result in stable activities if their protagonists also get involved in meso-public spheres, that is, in groupings designed to fight for these logics of heterodox action that are otherwise steamrolled by the orthodox conception of the economy. The fundamental task is therefore the co-construction of public policies. Micro-public spheres are no more geared toward reconciliation than are meso-public spheres; on the contrary, they sustain conflict through which "temporary consensuses are constructed—definitions of the common good that are not present to begin with in society and are literally the product of democratic debate" (Lévesque, 2001: 100).

This project imposes a strategy of alliances between democratic forces, beyond the market-state dualism. The reference to social and solidarity economy is a first step: it can become a resurgence of early associationalism if the different statuses are no longer isolated but brought together. In these conditions, synergies between cooperatives and other components, such as the commons, can develop. A multi-dimensional strategy becomes easier if the community base is valued, as exemplified in a lot of recent cooperatives and in local examples like Conjunto Palmeiras in Fortaleza, Brazil (Laville and Torres, 2024). Cooperative development is no longer an objective in itself, but it takes its place within a broader project of economy for the people and planet, against the disasters of an extractivist and productivist system. This project needs "public" social and economic sciences, in the sense elaborated by Michael Burawoy (2007), i.e., sciences *with* civil society.

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