

# Expanded abstract

## Trends in research on the history of cooperativism and the social and solidarity economy in Latin America. Advances in its analysis and interpretation

### Objectives

The main objective of this article is to provide an updated, retrospective overview of historical studies on the social economy in Ibero-America. This is complemented by a brief review of emblematic 19th-century studies on the cooperative model, as well as of key research trends in countries such as Portugal and France.

In the case of Ibero-America, the article examines both comparative studies across several Latin American countries and notable monographic works focusing on specific nations in the region.

A further aim of this paper is to identify research gaps and potential new lines of inquiry related to the historical study of the social and cooperative economy.

### Methodology

The methodology employed in this study is based on the collection and analysis of books, journal articles, and working papers relevant to the historical study of the social economy. This approach supports a comparative analysis across the Ibero-American region.

### Main Contents of the Article

This article presents an overview of the main historical studies related to the social and cooperative economy at the international level, with an emphasis on Latin America.

At the international level, it is relevant to note that since the creation of the first cooperative in Rochdale, England, in 1844, a tradition of chronicling the historical process that led to the creation of this first organization began, as evidenced in George Jacob Holyoake's book. Later, in the 20th century, texts by authors such as Gromoslav Mladenatz and Paul Lambert provide a historical overview of both the processes of collective action and the cooperative model itself, extending back to periods of high cultures such as Mesopotamia and Egypt.

At the European level, works related to France, the country where the concept of the social economy initially originated in the late 18th century, stand out. In the case of this country, the works of authors such as Henry Desroches, Jean-Luis Laville, Thirry Jeantet, and Roger Verdi-er, among others, stand out. They have delved into a historical overview of the French social

economy and its relationship with the various historical periods of that country over the last 200 years.

Regarding comparative studies in Latin America, and specifically for the cooperative sector, the work of authors such as Dieter Benecke stands out. He led a series of national studies on the cooperative sector in the 1960s and 1970s. From this same perspective, the work of ECLAC stands out. During the 1980s, it led a series of national studies that were compiled into a text published in 1989. It is important to highlight that in 2021, ECLAC will once again conduct a comparative study in eight Latin American countries on the historical trajectory of public policies oriented toward the cooperative sector. These studies are compiled in a collective book that incorporates an interesting comparative analysis.

In the context of the International Year of Cooperatives in 2012, it is important to highlight a series of books published by the ILO on the historical trajectory of the cooperative sector in various Latin American countries, as well as the publication of a comparative book on the cooperative sector in Latin America that shows the progress and challenges the sector has faced in recent decades in the region. An important milestone in historical studies of the social and solidarity economy in Latin America has been the formation of the Network of Studies in Historical Perspective of the Social and Solidarity Economy (REPHESS). This research group has created a space for academic discussion of the history of cooperativism in Latin America. Within this framework, two meetings were held (Buenos Aires, 2013, and Bogotá, 2014) that brought together a group of researchers from the region to organize and organize a narrative on the history of cooperativism. This resulted in an interesting proposal for the periodization of history that has been debated and revised on multiple occasions, but which has served as the basis for various historical studies and courses on the history of cooperation in Latin America. In parallel to the various works reviewed for Latin America from a comparative perspective, the article identifies a series of works that have a national perspective for both Latin America and Spain and Portugal, where the work of Juan José Rojas stands out, for example, for Mexico; for Brazil, the works of Diva Pihno Benavides; Alberto Gross and Pérez Arocas for Chile; Roberto Di Estefano for Argentina; Alvaro Garrido for Portugal; and the historical text of the cooperative sector in Spain by Joan Reventos.

## Findings and Research Limitations

The main findings derived from this study include:

- a) The confirmation of a longstanding tradition of historical research on the social economy, both globally and within Ibero-America.
- b) Despite this, particularly in Latin America, efforts to foster comparative studies with a shared analytical framework have been largely isolated, and there is no evidence of a systematic or sustained research agenda in this field.
- c) The reviewed literature reveals substantial variability in objectives, methodologies, theoretical frameworks, historical periods, and analytical scope-ranging from general approaches to the social economy to more specific studies on its traditional components: cooperatives, mutual societies, associations, and foundations.

- d) At present, there are no active comparative research programs addressing the history of the social and cooperative economy in Ibero-America.

One of the main barriers to advancing this field -both in the Ibero-American context and internationally- is the difficulty in accessing public and private historical records related to these types of organizations.

## Conclusions and Original Contribution

One of the main conclusions of this study is the identification of a broad and underexplored research field with significant potential for further investigation into the history of the social and cooperative economy. This opens the door to developing comparative research lines based on organization type, historical period, economic sector, or specific thematic axes such as public policy or gender analysis.

An additional line of research that warrants development involves bibliometric studies aimed at better quantifying historical and current trends in this field. This would require the identification and measurement of scientific output published in academic journals.