

An Analysis of the Cooperative Movement in Brazil in the Light of Regional Development

Uma análise do movimento cooperativo no Brasil à luz do desenvolvimento regional

Análisis del movimiento cooperativo en Brasil a la luz del desarrollo regional

Deivid Ilecki Forgiarini¹
Cinara Neumann Alves²
Alexandre de Souza Garcia³

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¹ Doctorado (Administración-UNISINOS); Master (Desarrollo Regional-UNISC); Pregado (Administração- UNIPAMPA).

Correo electrónico: deividforgiarini@gmail.com

² Doctorado (Desarrollo Regional -UNISC); Master (Desarrollo Regional-UNISC); Pregado (Administração- UNIPAMPA).

Correo electrónico: cinaranalves@gmail.com

³ Doctorado (Administración-UNISINOS); Master (Administración-UNISINOS); Especialización (Administración-UFRGS); Pregado (Economía- UFRGS).

Correo electrónico: garcia@resultare.com.br



Resumen

This article explores the cooperative movement in Brazil, identifying a theoretical gap in the understanding of its integration into broader socio-economic frameworks. It aims to assess the movement's role in regional development and autonomy through historical analysis and contemporary evaluation. Utilizing a historical and analytical methodology, the study examines the evolution of cooperatives, their impact on regional development, and challenges faced. Results indicate significant contributions to regional development yet highlight the need for deeper cooperative education and participatory democracy. The conclusion suggests that while cooperatives have fostered regional autonomy and development, greater integration of cooperative principles is essential for sustained and sustainable impact.

Keywords: regional development; Brazilian cooperative movement; cooperatives.

Abstract

Este artículo explora el movimiento cooperativo en Brasil, identificando una laguna teórica en la comprensión de su integración en marcos socioeconómicos más amplios. Su objetivo es evaluar el papel del movimiento en el desarrollo regional y la autonomía mediante un análisis histórico y una evaluación contemporánea. Utilizando una metodología histórica y analítica, el estudio examina la evolución de las cooperativas, su impacto en el desarrollo regional y los retos a los que se enfrentan. Los resultados indican contribuciones significativas al desarrollo regional, pero destacan la necesidad de una educación cooperativa más profunda y una democracia participativa. La conclusión sugiere que, si bien las cooperativas han fomentado la autonomía y el desarrollo regionales, es esencial una mayor integración de los principios cooperativos para lograr un impacto sostenido y sostenible.

Palabras clave: desarrollo regional; movimiento cooperativo brasileño; cooperativas.

Resumo

Este artigo explora o movimento cooperativo no Brasil, identificando uma lacuna teórica na compreensão da sua integração em estruturas socioeconômicas mais amplas. O objetivo é avaliar o papel do movimento no desenvolvimento regional e na autonomia por meio de uma análise histórica e uma avaliação contemporânea. Utilizando uma metodologia histórica e analítica, o estudo examina a evolução das cooperativas, o seu impacto no desenvolvimento regional e os desafios enfrentados. Os resultados indicam contribuições significativas para o desenvolvimento regional, mas destacam a necessidade de uma educação cooperativa mais profunda e de uma democracia participativa. A conclusão sugere que, embora as cooperativas tenham promovido a autonomia e o desenvolvimento regional, uma maior integração dos princípios cooperativos é essencial para um impacto sustentado e sustentável.

Palavras-chave: desenvolvimento regional; movimento cooperativo brasileiro; cooperativas.

Tesauros

P13 Empresas cooperativas; empresas de trabajadores; propiedad de los empleados.

O18 Desarrollo regional, urbano y rural; análisis de desarrollo territorial.

R11 Actividad económica regional; crecimiento y disparidades regionales.

Introduction

Cooperativism can be comprehended as a form of social organization and production that emerged in the 19th century in Europe as a response to the burgeoning capitalist system. Its theoretical bases trace back to the ideas of the “utopian socialists” and were further solidified with the establishment of the Rochdale Society of Equitable Pioneers in 1844 (Bernstein, 1997; Luxemburgo, 1986; Mandel, 1990; Mladenatz, 2003; Owen, n.d.; Petitfils, 1985). The founding of this society holds symbolic significance in unveiling the contemporary cooperative identity.

From that success, the cooperative movement gained strength within a context of struggle and resistance within the working class. Serving as a cornerstone of the labor movement, which initially emerged in urban areas, particularly in factories, before spreading to rural areas. Cooperatives were viewed as a mechanism for generating economic resources that would facilitate human development, in contrast to capitalist organizations. This movement proliferated across the Western world, undergoing redefinition based on societal development and the territorial characteristics of each region (Namorado, 2007; 2013)

The cooperative identity is comprehended as a collection of definitions, values, and principles of cooperativism, as outlined by the International Cooperative Alliance (ICA) (2015). The ICA advocates for cooperative identity as a guiding principle for organizing and operating cooperatives. The principles serve as guidelines for cooperative management. Together, these principles presuppose a series of processes in cooperative education, which should be reflected in the development of a cooperative throughout the years (Schneider, 2019).

In summary, the cooperative identity encourages cooperatives to attain autonomy, freedom and pursue a comprehensive understanding of and response to cooperative members’ needs. This way they also promote the transformation of society through the embodiment of cooperative values in the daily organizational activity.

The declaration of cooperative identity converges with the conception of regional development. It envisions a society actively engaged in its development process, with organizations and institutions that contemplate development in harmony with the territory (Etges & Degrandi, 2013). Development is a “concept of broader diffusion and use in all sectors of activities” (Riedl, 2017, p. 97). This concept has undergone various characterizations since the 1950s. Conversely, research and actions based on the concept of regional development seek to provide a comprehensive understanding of “development.” This entails going beyond the economic aspect to discuss inequalities among different territories, including within the same territory. The debate on power

relations and new methodological approaches to analyze these phenomena also constitutes part of the theoretical field of regional development (Theis, 2019).

This debate about the concept of development that pits the simpler understanding of development against the understanding of regional development is a Brazilian reality. It is an ongoing discussion that is being constructed through dialogue with other fields of knowledge. It is linked to the process of reducing inequalities between regions through public policies and is also connected to the development process involving agents and resources from within the region, encouraging other actions and policies along the same lines (Silveira, 2020). Regional development aims to reflect an autonomous society, politically active, cohesive, with its identity strengthened, and above all, emancipated, not only politically but also economically and socially, thus turning the region into the protagonist of its development (Etges & Degrandi, 2013).

The regional scope adopted in this article refers to the Brazilian regional divisions. In Brazil, the Federative Units (States) are grouped into five major regions, considering “concepts and methods revealing the growing importance of economic articulation and urban structure in understanding the process of organizing the Brazilian space, resulting in the following denominations: North Region, Northeast Region, Southeast Region, South Region, and Midwest Region” (Brazilian Institute of Geography and Statistics, IBGE, n.d.). These regions still have internal regional geographical, political, economic, and social conditions subdivisions.

The analysis proposed in this article is not oriented towards a specific region but seeks a general overview. Analyzing Brazil as a homogeneous whole diverges from the theoretical paradigm of regional development in Brazil. Being a very large country in terms of territory and endowed with cultural diversity and very distinct processes of societal construction between regions, much like the United States, Russia, China, or India, a broad analysis of the entire country is possible, but it has limitations. An analysis indicating new perceptions and possibilities of study, new perspectives, and paths for thinking about regional development and the role of cooperatives in regional development are feasible. The studied historical process shows that in some regions, the cooperative movement had a greater presence, as in the case of the South and Southeast regions.

The conceptions of regional development used in this article encompass Brazilian regional characteristics. Therefore, it is necessary to understand the concept of territory and region to comprehend the concept of regional development. Territory has a unique identity formed by the people who inhabit this space. A location becomes a territory when considering people, organizations, social, and economic interactions, i.e., it is an intangible asset. In other words, space becomes a territory through the

development of social constructions. Thus, the region is defined by economic, social, political, and cultural interests.

Therefore, it is important that people from the region know each other and understand their territory. In doing so, these individuals can identify their needs and potentials, enabling the pursuit of social cohesion around common themes relevant to the people in that specific region. For this process to occur, it is crucial to establish effective forms of representation where individuals can actively participate in various instances of territory management and planning. If necessary, there should also be the creation of other means to involve people in this process (Etges & Degrandi, 2013).

In other words, development "arises from a change in individual capacity, resulting from a mechanism of assessment and adaptation, i.e., a transformation of pre-existing individual skills and an adjustment of abilities to the existing need" (Borba & Siedenberg, 2010, p. 344). In this logic, it is the people of this region who generate their improvement in quality of life. This will not occur with transnational companies lacking commitment to this territory, nor with a central government solely focused on the next elections. Instead, it will happen with the individuals living in and caring for this region, involving small businesses, organized civil society, and, in this case, paying special attention to cooperatives.

This article seeks to present a possible understanding of the cooperative movement in Brazil, considering regional development since the establishment of the first cooperatives in the country. It does not constitute or propose an in-depth analysis due to the vast and complex regional characteristics of Brazil. This research is based on the doctoral thesis of the first author.¹

The aim is to reflect upon the development of cooperatives during the 20th century, considering their relationship with significant moments in the country's history, through an analysis commencing with the earliest experiences of the cooperative movement in Brazil. The analysis spans from Getúlio Vargas's² governments (the first cooperative law) through the authoritarian period, democratization, the guarantee of association freedoms, and into the 21st century, addressing the discussion on cooperative identity.

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- 1 This article results from the bibliographical research carried out in the thesis "The field of higher education in cooperativism: an analysis from the social construction of higher education in cooperativism in Rio Grande do Sul" by Cinara Neumann Alves.
 - 2 Getúlio Vargas (1882-1954) was an important statesman and president of Brazil from 1930 to 1945 and from 1951 to 1954. The period of his first government became known as the "Vargas Era" and was marked by the defense of workers' and nationalist causes and by state control of organizations.

Methodology

This article is bibliographic research that analyzes the trajectory of the cooperative movement in Brazil. It also employs secondary sources of data, such as documents, publications, articles, books, and other written materials, as well as oral communication materials that are publicly available and widely accessible. The aim is to “put the researcher in direct contact with everything that has been written, said, or filmed on a particular subject, including conferences followed by debates that have been transcribed in some form, whether published or recorded” (Marconi & Lakatos, 2018, p. s/p—translated by author).

The bibliographic search was conducted through widely accessible platforms, such as the CAPES³ Periodicals Portal, CAPES Theses and Dissertations Database, and printed press materials available online and at the National Library, through the Digital Hemeroteca. This last resource was fundamental for the research as it allowed the filling of historical gaps in the study—facts and periods not previously documented by researchers, thus lacking prior scientific treatment (Marconi & Lakatos, 2018).

The analysis of the research aimed to engage in the reflective process inherent to bibliographic research, establishing connections among the data and presenting an approach to the topic considering the concepts of regional development in Brazil.

Results

The first cooperation experiences in the world and in Brazil

Since the 19th century, various cooperation experiences have been considered part of the history of the cooperative movement. In Brazil, experiences even predating the 19th century are regarded as cooperative experiences, such as the Messianic Movements⁴ (around 1530 to 1540), the Republic of Palmares⁵ (between 1600 and

3 Coordination for the Improvement of Higher Education Personnel is a foundation linked to the Ministry of Education of Brazil that works on the expansion and consolidation of Master's and Doctorate education in all Brazilian states.

4 The Messianic Movements were based on the belief in the appearance of a savior, who would eradicate evil and restore happiness and prosperity on Earth (Negrão, 2009).

5 The Republic of Palmares, also known as Quilombo dos Palmares, was a community of runaway enslaved people (Freitas, 1973).

1695), and even the Jesuit Reductions⁶, which existed from the 16th century (Pinho, 1991; Perius, 2020).

The “integration” of the diverse sociocultural formations already present in the Brazilian territory, whether through Jesuit reductions or not, positioned themselves within the context of European colonial domination throughout South America.

Therefore, considering the theory of cooperativism, this practice is refuted, with the will and autonomy of individuals and collectivities being the driving force of a cooperative. This does not mean relativizing those historical experiences, whose protagonism must be emphasized due to their historical importance.

“Modern cooperativism” began in Europe in the 19th century and soon expanded to different places (Namorado, 2007; 2013). In Brazil, it gained historical visibility from the 19th century onwards (Pinho, 1991). In that century, two events were significant. The Proclamation of Independence in 1822 changed Brazil’s historical status from a colony to an empire, posteriorly resulting in the abolition of slavery, the establishment of the Republic, and the creation of favorable conditions for the development of properly capitalist social relations (with the expansion of wage labor) in the country.

Linked to these transformations is the historical process of European immigration to Brazil, which facilitated the knowledge and incorporation of experiences already accumulated in Europe in creating cooperatives. Since the Empire era, there have been some cooperative experiences, for example, the formation of the rural settlement *Colônia Tereza Cristina*⁷ in Paraná in 1846. This proposal was based on the model of community developed by “utopian socialists” (Antonelli, 2013).

With the immigration of Europeans, settlements were formed (mainly Germans and Italians) based on bonds of trust and friendship, which strengthened them internally as colonies. Language, history, family, and, above all, necessity, drove these bonds of solidarity (Schallenberger, 2001). These immigrant communities, reinforced by a Christian asceticism not necessarily inherent to these immigrants but constructed based on necessity, created favorable conditions for the development of cooperative practices committed to community gains and driving a memory of cooperation.

The importance of religious institutions in the formation of a cooperative movement in the country is noteworthy. A good example is the experience of Father Theodor

6 The Jesuit Reductions were part of a project by the Catholic Church for the catechization of Native Americans through the construction of communities similar to small cities that worked cooperatively (Freitas, 1982).

7 *Colônia Tereza Cristina*: A settlement founded in 1847 by the French doctor João Mauricio Faivre, who dreamed of creating a new world, eliminating the notion of profit and prioritizing respect for family and religion. The colony was a rural settlement with 80 families seeking self-sufficiency. This experience took place in the state of Paraná.

Amstad, who, upon arriving in Brazil in the 19th century, perceived the socioeconomic needs of the populations and took it on as a task of his priesthood. For him, Brazilian culture appeared distant from the ascetic ideals advocated by his religious values: "The concepts of labor, power, and society, of Amstad, of Judaic-Christian content, based on the principle of rationality for organizing life as a future project, failed to provide an answer to what he could observe" (Schallenberger, 2001, p. 10). The religious challenge for Amstad was to promote material and spiritual well-being. His efforts resulted in the creation of the first credit cooperative in 1902 in the southern region of Brazil, which sparked discussion and the organization of similar experiences.

The abolition of slavery in 1888, as well as the Proclamation of the Republic in 1889, marked the beginning of the Old Republic, a period in which the export-oriented primary economy, a less interventionist State than the previous periods, and regional oligarchies that shared political power characterized an agro-exporter model of development (Cano, 2000). This period was of great importance for the cooperative movement. The 1891 Constitution guaranteed the right of association; republican ideals and the development of urban spaces, propelled the emergence of various cooperatives (Pinho, 1991).

The turn of the 20th century, therefore, was characterized by significant socioeconomic and political transformations in Brazil, initiating a process that would result in 1930 in a capitalist development model centered on industrial production. The formation of formal associations of farmers propelled the organization of cooperatives and associations, aiming to ensure better economic results for themselves and their communities.

From the Vargas Era to the End of the Dictatorship: The Oscillation Between Democracy and Control from 1930 to 1988.

Shaken by the "1929 crisis," the Brazilian Government led a historical process of industrialization in the country, with a perspective of import substitution (Cano, 2000). The first legal milestone of the cooperative movement in Brazil was the promulgation of Decree-Law No. 22,239, which regulated the organization and functioning of cooperatives (Casagrande, 2014). This spurred the formation of cooperatives, especially agricultural ones, generally oriented towards meeting the domestic market. This law characterized cooperatives in the Rochdalean model, inspiring other policies and cooperative formations in this model (Moura, 1947).

The industrialization in the country caused a rural flight, increasing the demand for industrialized products and urban infrastructure and creating a shortage in agricultural production, leading to a supply crisis. Cooperatives became a key element in the government's agenda to address the internal supply problem. Thus, there was government encouragement for the creation and development of farmers' cooperatives, especially through access to credit and tax incentives (Casagrande, 2014). The president himself highlighted this incentive at the National Conference on Economics and Administration held in 1939 in Rio de Janeiro: Cooperativism has not progressed as anticipated. The investigation examines the structure and operations of cooperatives in 189 municipalities. Nevertheless, it is through a cooperative organization that we must extend financial assistance to farmers (Vargas, n.d.— Translated by author).

At the same time as it encouraged the development of cooperatives, the Getúlio Vargas government established a policy of state control over cooperatives. In this direction, Decree No. 22,239 of 1932 was revoked through Decree-Law No. 24,647 of 1934, giving the State greater control over cooperatives (Moura, 1947; Pinho, 1991). Cooperatives became financiers of unions regulated by the State. Unions would take on a new role in the government's new corporatist policy, which regulated competition between companies, promoting ethics in the market: "They would function as adjunct organs of the State, performing services in the public sphere" (Paula, 2018, p. 73). Thus, cooperatives, which became linked to unionism, were also under the tutelage of the State, denying the principle of autonomy characteristic of the cooperative movement (Moura, 1947). From then on, spanning different governments and several decades, cooperatives in Brazil became strongly controlled by the State, which gave governments the power to create, operate, and regulate the cooperative movement in the country.

The Brazilian cooperative movement strengthened with the formation of new cooperatives under the tutelage of the State and based on an ideological vision asserted from the political interests of the economically dominant classes in the country, during the 1940s and 1950s. An example of the ideological control exerted by the government can be seen in the news of the time about the cooperative movement, such as that reported in *A noite*, an evening newspaper circulated between 1911 and 1957 in Rio de Janeiro. The discourse used in the note speaks of the support and sympathy of then-President Vargas for cooperativism and how his government "professionalized" and boosted cooperative organizations in the country.

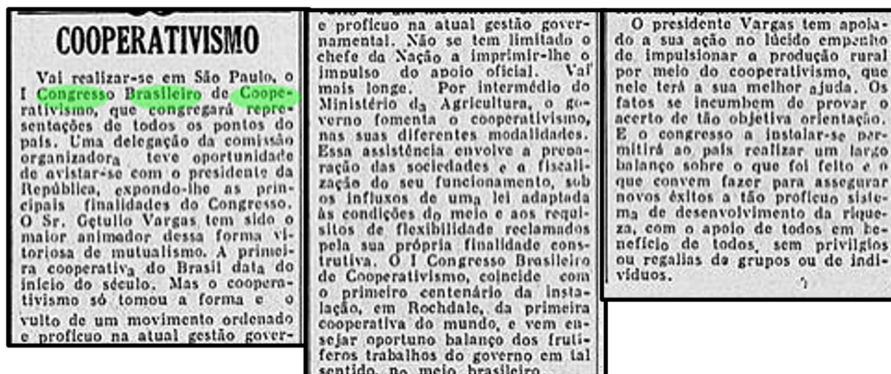


Figure 1. News about the holding of the 1st Brazilian Congress of Cooperativism – “A Noite” Newspaper.

Source: Jornal A Noite (1944).

The news published in the “A Noite” newspaper highlights the holding, in late 1944, of the 1st Brazilian Congress of Cooperativism, which took place from December 18 to 21 of that year in São Paulo. The congress occurred in the centenary year of “modern cooperativism” and was presided over by the then Minister of Agriculture. One of the “theses” of the Congress, in addition to tax exemption for cooperatives, was the formation of a more comprehensive national federation of cooperatives without restrictions on types and genres, as permitted by existing legislation (Diário de Notícias, 1944). The 1946 constitution once again guaranteed freedom of association, after the dictatorial period of the Vargas government and the turmoil of World War II. The 1950s began with the intention of connecting Brazilian cooperativism with the ICA.

However, the structure of attaching cooperativism to the State remained intact. So much so that Getúlio Vargas’ second government, in the early 1950s, maintained the structure previously established. In 1956, Juscelino Kubitschek⁸ assumed the Brazilian government and initiated a Goals Plan, which included intense industrial and infrastructure investment in the country. His government was also marked by the ambitious plan to build Brasília, the new national capital, constructed in the middle of the Midwest region. This region became the destination for many migrants in the second half of the 20th century. Previously sparsely inhabited, the region became part of development programs that stimulated the creation of cooperatives. With the increase in population and urban areas, the establishment of housing, education, and

8 Juscelino Kubitschek (1902-1976) was the President of Brazil from 1956 to 1961. He was known as “JK” and his government was marked by the Goals Plan aimed at promoting 50 years of country development in 5 years – 50 years in 5, as well as the construction of Brasília (Gomes, 2002).

health cooperatives was encouraged, in addition to agricultural cooperatives focusing on commodity production (Duarte & Wehrmann, 2006; Silva et al., 2003).

In 1963, the Organization of Cooperatives of the Americas (OCA) was founded in Uruguay. It was a non-profit civil society organization that sought to promote the unity of the cooperative movement in the Americas (Correio da Manhã, 1962; 1963). The OCA later became ICA Americas (Rodrigues, Internacionalização, 2014).

While the 1960s began with significant expectations for the organization of the cooperative movement in South America, in Brazil, the military coup of 1964 marked the end of the national-populist government period and established an authoritarian regime that would last until the 1980s. This long period, broadly speaking, can be divided into three phases, although the authoritarian and politically repressive character remained constant:

- a) From 1964 to 1967, when the authoritarian state was established, political and social repression was intense, and from an economic perspective, the governments implemented a recessive policy and wage restraint, aiming to create more favorable conditions for capital reproduction in the country;
- b) From 1968 to 1974, the “Brazilian miracle,” the country’s economy showed high rates of economic growth, infrastructure expansion, and “capitalist modernization of the country’s economy,” but with deepening social inequalities. But in that period, repression continued with an economic policy focused on wage restraint, external indebtedness, and the formation of internal savings;
- c) From 1975 onwards, the “post-miracle” era, when economic indicators signaled that the military could not successfully manage the economic and political model implemented. Thus, in the 1970s, there was a growing political and social movement that resulted in the final crisis of the authoritarian period and the establishment of a democratic process (Cano, 2000).

In 1966, the military government defined the National Cooperative Policy, implementing state control over cooperatives (Pinho, 1991). The interests stemming from the territorial expansion project of capitalist development in the country, however, secured the support of authoritarian governments for cooperatives, maintaining and expanding incentive policies for them.

Regarding the cooperative organization movement, many actions took place resulting in the creation of different entities, which was observed between 1965 and 1969. In 1965, the II Brazilian Cooperative Congress took place, promoted by the

National Union of Cooperatives (UNASCO). A split in ideological currents within UNASCO led to the formation of the Brazilian Association of Cooperatives (ABCOOP) (Correio Braziliense, 1965).

The Brazilian cooperative movement came to have two representative entities, UNASCO and ABCOOP, the former being older and the latter aligned with the government and ICA. In a historical process characterized by authoritarianism and governmental interest in the growth of cooperative experiences, the merging between these two entities was incentivized by the government, which came to be in 1969, giving rise to the Brazilian Cooperatives Organization (Pinho, 1991).

The new entity had the mission of defending and representing the national cooperative movement to governmental authorities for the drafting of a new law for cooperatives. It advocated for the following principles: 1. Legislation dedicated to cooperatives; 2. Defense of the National Cooperative Credit Bank; 3. Fiscal and social security regime for cooperatives; 4. Official services dedicated to cooperatives and 5. National representation of cooperatives (Correio Braziliense, 1969; Correio da Manhã, 1969). After unification, it was necessary to regulate the new form of cooperative representation. On June 8, 1970, the ocb⁹ (Brazilian Organization of Cooperatives) was registered as the entity defending the interests of Brazilian cooperativism” (OCB, 2018).

The creation of the ocb was characterized by the alignment of significant sectors of the cooperative movement with the authoritarian government, both economically and politically (Pinho, 1991). In 1971, Law No. 5,764/71 was promulgated, defining the National Policy for Cooperatives, known as the Cooperative Law (Pinho, 1991). This marked the second major legal milestone for cooperatives in the country. Law No. 5,764/71 imposed a series of guidelines on cooperatives, organized their structures, outlined the principles of cooperativism as guidelines to be followed, and structured the cooperative system, linking the functioning of cooperatives to representative organizations.

Article 107. Cooperatives are required, for their operation, to register with the Brazilian Cooperatives Organization or the state entity, if available, by presenting their social bylaws and subsequent amendments. [...]

Sole Paragraph. Upon registration, the cooperative shall pay 10% (ten percent) of the highest current minimum wage if the sum of its sub-

9 ocb: The sole representation of Brazilian cooperatives, responsible for fostering and defending cooperativism in Brazil, presenting the movement as a solution for a fairer world with better opportunities for all.

scribed capital and funds does not exceed 250 (two hundred and fifty) minimum wages, and 50% (fifty percent) if that amount is higher (Brazil, 1971—translated by author)

During the 1970s, the law underwent modifications through the National Cooperative Council, granting the State even greater power over cooperatives and their operationalization. This period was marked by a combination of economic growth phases with restrictions on political and civil liberties (Pinho, 1991; 2008).

The creation of cooperatives has always been considered a strategy for Brazil's development, especially in the agricultural sector (Schneider & Lauschner, 1979; Pelegrini, Shiki, & Shiki, 2015). Initially, the country saw consumer cooperatives, credit cooperatives, work cooperatives, and general service cooperatives catering to the urban population. Soon after, rural agricultural and credit cooperatives were encouraged. Three types of cooperatives were observed in rural areas: a) plantation model cooperatives; b) production cooperatives for supplying the domestic market; and c) subsistence agriculture cooperatives in regions with low development indices (Schneider & Lauschner, 1979; Crúzio, 1994).

The end of the military dictatorship changed the landscape of the Brazilian cooperative movement. Roberto Rodrigues was elected president of OCB in 1985; he also assumed the vice presidency of OCA and initiated a process of internationalization of the Brazilian cooperative movement (Rodrigues, 2014). Aligned with this, the new Constitution of 1988 brought new contours and perspectives to the Brazilian cooperative movement (Perius, 2001).

The Challenge of Redemocratization from 1988 to the Early 2000s

The New Constitution from 1988 guaranteed free association and the creation of new cooperatives without the need for state authorization. It defined the State's role in encouraging and supporting cooperatives and associations, ensured an appropriate tax regime, and solidified the concept of cooperative acts (Péius, 2001). From 1990, the cooperative movement embarked on a path of increased internationalization (Rodrigues, 2014).

The Brazilian cooperative movement, as it internalized and took advantage of the creation of regional councils within the ICA, such as ICA Americas, achieved recognition for its professionalism and relevance within society (Rodrigues, 2014). However, between 1980 and 2000, the country faced an economic crisis. Internally,

worker cooperatives experienced their period of greatest expansion (Silva et al., 2003). The significant increase in cooperatives in Brazil can be attributed to “the economic scenario that unfolded in Brazil from 1994 with the monetary stabilization process (Real Plan). The massive outsourcing of public and private activities through cooperatives also contributed to this” (Silva, et al., 2003, p. 92). But the 1990s were also a time of crisis for cooperatives, especially agricultural ones responsible for the country’s internal supply. Thus, in 1998, the Recovery Program for Cooperatives (RECOOP¹⁰) was created, allocating R\$ 2.1 billion¹¹ for the recovery of agricultural cooperatives with amortization terms of up to 15 years (Oliveira, 2015).

Right after the implementation of RECOOP, SESCOOP was founded to meet cooperatives’ demand for professional training that considered their peculiar organizational aspect. Until that date, learning and professional training programs, as well as resources for training and education (compulsorily collected for this purpose), for cooperatives were carried out by other entities in the so-called S System,¹² according to the cooperative’s typification.

There was a proliferation of worker cooperatives, many created without guidance on cooperativism, thus becoming marginalized and considered in studies as “a means of making labor relations flexible, outsourcing services, and seeking to reduce labor costs” (Gaiger, 2013, p. 216).

Other movements began to emerge in the country. New cooperatives linked to solidarity enterprises appeared, identifying with the principles of cooperativism and solidarity economy. These movements originated in the popular classes and social movements and were linked to other cooperative representation organizations rather than the ocb (Ferreira & Souza, 2018). Gaiger (2013) designates these new cooperatives as popular or solidarity economy cooperatives. These cooperatives constitute themselves in the self-perception of a model of self-management and economic solidarity suitable for meeting workers’ interests. Simultaneously, this solidarity movement questions the cooperative system and its political representation developed up

10 It was a credit release program promoted by the federal government.

11 In updated values (Feb 2024): R\$ 16 billion Brazilian Reais or US\$ 3.2 billion dollars.

12 The “Sistema S” is a set of organizations of corporate entities focused on professional training, social assistance, consultancy, research, and technical assistance, which, in addition to having their names starting with the letter “S”, have common roots and similar organizational characteristics. The “Sistema S” includes National Service for Industrial Apprenticeship (Senai); Social Service of Commerce (Sesc); Social Service of Industry (Sesi); and National Service for Commercial Apprenticeship (Senac). Additionally, there are the following: National Service for Rural Apprenticeship (Senar); National Service for Cooperative Apprenticeship (Sescoop); and Social Service of Transport (Sest) (Federal Senate, 2021).

to that moment in the country, redefining its conception of how cooperatives should be (Gaiger, 2013; Ferreira & Souza, 2018).

The 21st Century: Let's get started with Cooperative Identity!

The 2000s are marked by significant changes in the configuration of Brazilian society. In 2002, the election of Luís Inácio Lula da Silva marked the beginning of a government more aligned with popular ideals and demands, promoting structural changes in various sectors, especially in technology and higher education. Roberto Rodrigues, who had finished his term as president of ICA in 2001, assumed the Ministry of Agriculture in 2003. Within the ministry, the Secretariat for Agricultural Development and Cooperativism was created, aiming to "support sustainable rural development, preserve natural resources, disseminate technological knowledge, and promote cooperativism and associations" (Rodrigues, 2005, p. 4). The OCB system felt the effects of the creation of SESCOOP and consolidated itself as a representative entity of cooperatives with business traits, including agricultural cooperatives, which held a strategic position nationally.

In parallel to these events, the National Secretariat of Solidarity Economy (SEN-AES) was created in 2003, under the leadership of economist Paul Singer, addressing a popular demand. Note that solidarity enterprises have cooperatives as a strong pillar of their operation but not the only one. This peculiarity, combined with other factors, shapes a new economy aligned with the utopian ideas of cooperativism.

Thus, entities representing the solidarity economy include the Union of Cooperatives of Family Agriculture and Solidarity Economy (UNICAFES); Central of Cooperatives and Solidarity Enterprises (UNISOL); Confederation of Cooperatives of Agrarian Reform in Brazil (CONCRAB); National Union of Collectors and Recyclable Materials Collectors of Brazil (UNICATADORES¹³) (Ferreira & Souza, 2018; UNICOPAS, 2018). In 2014, during the I Interorganizational Meeting of Solidarity Cooperativism, UNICAFES, UNISOL, and CONCRAB (and later UNICATADORES) joined forces and formed the National Union of Solidarity Cooperative Organizations (UNICOPAS), an entity created to represent the concept of solidarity cooperativism and cooperators of family agriculture and solidarity economy in Brazil. In addition to this objective, UNICOPAS had agendas such as advocating for a General Law of Cooperativism, changes in tax

13 In Brazil, the name, using both genders, clearly marks the female participation. For the movement, this female participation is very important, as women, by generating income, achieve a certain autonomy in their reality.

legislation, registration of cooperatives in commercial boards, and the regulation of worker cooperatives, the latter being achieved by Law No. 12,690/2012 (Extension Center in Solidarity Economy of the University of São Paulo, 2012).

It is noteworthy, especially regarding the most recent period of the Brazilian cooperative movement, for its complexity. It is noteworthy, especially concerning the most recent period of the Brazilian cooperative movement, for its complexity. This complexity arises since different experiences and conceptions have been established in the country. Furthermore, these experiences are still influenced by the sector in which cooperatives operate. This fact is relevant because the political representation of the Brazilian cooperative system is based on the sector of action of the cooperative. In Brazil, there is even a specific term for this: “segments.” There are seven segments: 1) Production of Goods and Services; 2) Infrastructure; 3) Consumption; 4) Transportation; 5) Health; 6) Agriculture; and 7) Credit (ocb, 2019). But from the standpoint of the concepts guiding the discussions, planning, and management of cooperatives, different views are also present in this more recent period.

The movement for solidarity economy, initiated in the 1980s, encompasses a historical process of discussion and implementation of public policies aiming to guarantee work and income for urban and rural workers and affirm experiences of organizing production, sales, and consumption based on the values of self-management, solidarity, democracy, human development, commitment to the environment, and social responsibility (Gaiger et al., 1999).

On the other hand, the promotion of cooperatives as strategic agents for the economic development of the country within the context of a globalized capitalist economy reflects a tension in experiences among cooperatives, requiring them to adapt to the conditions imposed by globalization itself, increasing their levels of competitiveness in the market based on assumptions set forth by the logic of capital production and reproduction.

Faced with these tensions, the “original interests defined in the constitution” of the cooperative movement do not always manage to be represented in the decisions of cooperative managers, occupied with the needs resulting from an administration (business) conditioned by the competitive logic of the capitalist market. In this direction, not only are the dynamics of “productive restructuring” (including changes—modernizing—in the organization of work and production processes) promoted and become horizons of cooperative managers’ actions, but the cooperative experience itself begins to be discussed with parameters defined by the needs of adapting to the logic of production and reproduction of globalized capital.

In this direction, it is a conception of cooperativism that prioritizes the professionalization and management of cooperative activities. As Bialoskorski Neto (2012) states, referring to what he calls the “new generation of cooperatives,” this “new model” can be defined “as an organizational form that maintains the doctrinal principles of cooperativism but builds a new organizational architecture that brings modifications to property rights and induces cooperative organization to a higher level of economic efficiency” (p. 116). This conception, even referring to agricultural cooperatives, focuses on adding value to commodities produced by farmers and marketed by cooperatives.

Final Considerations

Cooperativism is a theory that originates from the utopian socialist ideas of the 19th century and reaffirms its philosophy in the Cooperative Identity Declaration, defining cooperatives, values, and principles of cooperativism. It advocates for the existence of autonomous, democratic organizations that uphold individual freedoms and collective well-being, aiming to promote, through cooperative education, individuals who are conscious of their role in society. The cooperative serves as an economic means to pursue a developed society committed to the territory.

In this sense, considering the regional development conceptions addressed in Brazil, cooperatives hold within their identity the potential to promote development, serving as leading organizations in this process. They have the transformative potential for regions. Through the practice of the seven cooperative principles, they promote processes of cooperative education, which have an impact on individuals’ actions in society. The exercise of participatory democracy within cooperatives reflects on civil society because individuals participating in cooperatives can understand the relevance of democratic participation in all environments in which they operate.

However, in Brazil, there is a lack of formative stimuli for cooperatives that encompass education and training of cooperative members before establishing the cooperatives. In other words, these organizations were often created based on interests that are external to the desires of the cooperative members. An analysis of the Brazilian cooperative movement reveals a flaw in the process of identity construction within organizations in Brazil.

The aim of this article was not to conduct an in-depth analysis of the topic but to raise possible problematizations for research in cooperatives and cooperativism. The analytical perspective is based on conceptions and productions carried out in Brazil. The literature published in Brazil reveals a lack of research considering the theoretical contributions of cooperativism in the analysis of the construction and development

of Brazilian cooperatives. The cooperative movement is studied based on empirical experiences in Brazilian regions but without a theoretical framework that allows for a reflective process of its development (Alves, 2019).

The presence of cooperative education and the encouragement of social participation were rare within the dynamics of the movement. However, fully democratic periods in Brazilian society were inconsistent. It was only from 1988, with the process of democratization, that freedom and emancipatory education, considering the role of each individual in society, allowed the cooperative identity to find a more receptive ground for theoretical and philosophical debate within the organization.

The analysis of the development of the cooperative movement in Brazil allows for a general understanding of cooperative dynamics in the country. The problematization of cooperative identity, that is, the incorporation of cooperative principles into the day-to-day operations of cooperatives, has been addressed in research aiming to comprehend the significance of this incorporation for the organization's development. Despite the regional singularities in the process of cooperative development, the establishment of these organizations in Brazil occurred from the outside, detached from individual and territorial desires and needs.

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