



Photo: Shannon Hanson

## A Learning Journey Through Cooperative Ecosystems

*This reflection was written by **Margaret Lund** who was also our guide on the ecosystem tour in cooperation with The Industrial Commons. Many thanks to the amazing cooperative communities across the globe that opened their virtual doors to us and the other US cooperators that accompanied us on this journey.*

### INTRODUCTION TO THE PROJECT:

Contemplating the prospect of a long winter of pandemic-induced solitude, leaders of The Industrial Commons decided to use the opportunity presented by enforced contemplation in place to really think about Place. Rather than traveling ourselves, the idea was to reach out to other cooperators across the world and invite them along on our intellectual journey to gain a better understanding of how policies and structures interact with people and place to create an optimal environment for cooperatives and other community-oriented enterprises to flourish. Joined by a group of friends and allies in the U.S. cooperative movement, our “armchair tour of cooperative ecosystems” stretched from October, 2020 to February of 2021 and involved a series of video visits and structured conversations with leaders of a variety of different cooperative support systems, some with more than a century of history, some which had come to life only in the last decade or two. Nine leaders<sup>1</sup> of cooperative systems from six different countries generously gave of their time and energy to help us on this journey.

The Industrial Commons (TIC) is a six-year-old nonprofit organization that founds and scales employee-owned enterprises and industrial cooperatives and supports front line workers to build a new Southern working class that erases the inequities of generational poverty and builds an economy and future for all. The goal of the tour was to help TIC to build upon their early successes to both broaden the impact of current efforts, and also lay the foundational groundwork that would make other, future efforts at community-centered industrial development not only more likely to emerge, but also more likely to succeed as a natural consequence of what has come before.

<sup>1</sup>We are indebted to Maurizio Brioni, Fred Freundlich, Tim Huet, Kari Huhtala, Jinwhan Kim, Hanna Muukka, Valerio Pellirossi, Roberta Trovarelli, and Martin Van Den Borre for their assistance with this project.

## ELEMENTS OF A COOPERATIVE ECOSYSTEM:

The metaphor of a “cooperative ecosystem” comes of course from biology. To take a definition from Wikipedia, an ecosystem is “a community of living organisms in conjunction with the nonliving components of their environment, interacting as a system”. In the context of cooperative development, it is a tangible, deliberate, thoughtful and integrated system of policies, practices and institutions that convene for the support and development of enterprises that are owned, controlled and accountable to members of the community in which they exist. An “Ecosystem Development Organization”<sup>2</sup> therefore, in the context of the work of TIC and their regional allies is “an organization that uses cooperative principles to harness the participatory power of communities to solve their own problems and to build an economy and equitable social fabric that breaks the cycle of generational poverty and marginalization.”

The cooperative ecosystems we visited included three that are amongst the most widely-admired in the world, that of Quebec, Northern Italy and the Mondragon group of cooperatives in the Basque region of Spain (the Big Three). We also included in our tour two much more recent efforts: the Arizmendi Association of bakeries in San Francisco and the new collection of cooperatives and social enterprises which have emerged in Seoul, South Korea in the last ten years. Rounding out the group was Finland, a relatively small country whose cooperative sector has been a key strategy for maintaining local ownership of enterprise while simultaneously succeeding in a highly competitive international market.

The specific elements of each cooperative ecosystem might differ (in fact, one element of the definition is that each is place-based and distinctive, growing up out of a unique set of circumstances), but in general we were looking at learnings in three areas:

**Infrastructure:** This element includes specific structures for financing, technical assistance, industry research, and education—both workplace and community-based. It also includes the existence of, and support for, networks of aligned businesses, as well as the existence of any secondary, auxiliary support institutions such as insurance companies or real estate development services.

**Context:** Context of ecosystem development includes the policy environment, economic, political and cultural context at the time of system’s key growth, as well as any pre-existing regional or place-based identity.

**Social Capital/Values:** In this area, we were interested in examining whether the development of a cooperative economy was the result of an explicit, values-based policy; whether there was a strong prior community identification and inter-allegiance that was separate from the cooperative ecosystem; whether the systems developed encouraged community wealth building and sharing of risk and profit; and if the economic development efforts also resulted in support for other quality-of-life indicators such as arts and social services. Additionally, we were looking at these ecosystems to see how they responded to marginalized communities such as recent immigrants or the chronically under-employed, and the ability and willingness of the system to integrate those who were not initially part of the foundational group.

## SIMILARITIES AND DIFFERENCES:

Of course, a cursory visit such as ours cannot begin to touch the nuance and depth of experience of each of these unique systems—we are tourists at best (maybe eco-tourists!), not expats, or even long-term visitors. Yet we were able to discern some telling similarities amongst these effective ecosystems, as well as some interesting differences. Common elements and themes include:

### **Infrastructure Plays a Critical Support**

**Role:** As we suspected, each of the most established cooperative development systems had a comprehensive system of supports for cooperative growth and development.<sup>3</sup> These included specialized financing available at a number of different levels; accessible, professional and comprehensive business technical assistance; and a flurry of auxiliary support organizations such as insurance, real estate, export assistance, and supply chain development, all organized and integrated to enhance the success of each individual cooperative.

**Policy Based on Practice:** All the systems shared the advantage of a beneficial policy environment that helped them to grow. It is important to note however, that in most cases including the three largest systems (Italy, Mondragon and Quebec), *the beneficial*

*practices of the cooperatives and their support organizations all pre-dated and heavily influenced some of the most exemplary elements of the policy support system.* In Italy, for example, the law on indivisible reserves was part of the formative 1948 legislation, but the practice of setting aside funds for the long term good of the cooperative had been in place for decades. And the tax advantages of doing so were not put in place until 1977, almost 30 years after the first law. In Mondragon and Quebec as well, important aspects of the cooperative infrastructure like free, well-staff government assistance in Quebec, were actually done at a local level before they became part of provincial policy.

**The Old Alongside the New:** While several of the ecosystems had their roots in the 19th century, the significant growth of the three most comprehensive systems are most associated with the post-WWII period. Both the Italian cooperative movement and Mondragon have explicit histories as oppositional forces to Fascism in their respective countries during the mid-20th century, and the



*Material Return Research and Development Manager, Bob Carswell, celebrates the build-out of our customized machinery that will drive a growing circular economy in Western North Carolina. Photo: Kara Jones*

<sup>3</sup>See matrix in Appendix C at the end of this paper.

first blossoming of the Quebec cooperative system can also be traced back more than 50 years.<sup>4</sup> What was interesting to learn was all of the new activity that these “old” systems have engendered in recent years. For example, Italy is a leading proponent and practitioner of “social cooperatives”, a new sector and practice of cooperativism first recognized by law in the 1990’s. The Quebec cooperative movement has embraced formal collaboration with the emerging “social economy” sector which has led to significant policy preferences for both, and formal recognition in 2013 as a “pillar” of the Quebec economy. And Mondragon has become an international leader in food retailing as well as manufacturing, building what is likely the largest multi-stakeholder<sup>5</sup> cooperative in the world. Which is to say, the old systems have not been stagnant; instead, they have leveraged their institutions and resources to address both emerging issues and opportunities. Having an established ecosystem of supportive institutions helps the system to welcome new industries and stakeholders.

**Generalists, but Specialists Too:** Each of the three most successful systems boasted an impressive and comprehensive array of cooperative enterprises not just in manufacturing but in banking, housing, retail, and services. Yet, even in the largest systems, the most extensive systemic support was not universally available for every kind of co-op. Industry-specific research centers are offered only in certain industries, for example, and priority attention is paid to things like supply chain elements and established community needs. Even the largest cooperative ecosystems do not try to do everything, but instead strategically use their resources to support existing cooperative value-chains and their associated communities.

**Primacy of Place:** Five of the systems we looked at were firmly rooted in a particular geographic, but also cultural and historical place. Each of them had some history of being dominated and oppressed by a larger and more powerful political force<sup>6</sup> which had in various ways and at various times, worked to obliterate local language, customs and institutions. It is a complex question how exactly this embattled history of marginalization and oppression fit into the story of each cooperative system, but at a minimum it likely contributed to the conditions of common experience, a clear and compelling need, and the belief that the only likely solutions would have to come from within.

**Driven by Pragmatism and Economic Necessity:** Related to political and cultural

domination by others is a common origin story of economic marginalization. Even as some of the stops on our tour such as Finland and Northern Italy today enjoy quite high per capita income and post admirable performance on a variety of other measures of economic wellbeing, such was not always

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<sup>4</sup>See Timelines in Appendix B at the end of this paper.

<sup>5</sup>Workers and consumers together as member-owners.

<sup>6</sup>Japan for South Korea, Sweden and Russia for Finland, Anglo Canada for Quebec and the Fascist central governments of mid-20th century Italy and Spain for the co-ops of Emilia-Romagna and the Basque region.

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### **Timeline Measured in Generations:**

Associated with a deep commitment to place is the common feature of every one of these cooperative ecosystems—both mature and emerging—to a vision of something bigger than themselves, and to building something of value to benefit future generations of workers and community members. Indivisible reserves<sup>7</sup> (required under Italian, Spanish and Quebecois law) are an explicit manifestation of this commitment in the workplace, but far from the only one. And this pledge to something larger than oneself is not merely a happy sentiment, but rather an integral economic driver of success for the entire system. Matt Hancock, in his book about the cooperative district of Imola in Emilia-Romagna<sup>8</sup>, credits the existence of indivisible reserves with fundamentally providing the Italian cooperatives with the patient funds necessary to effectively compete (and out-compete many others) in the growing market of the European Union. Another widespread manifestation of intergenerational solidarity could be seen in the variety of cooperative educational programs and initiatives that the co-ops supported in partnership with local schools and universities. This is good for kids, but also good for the cooperatives, as they help ensure a new generation of worker-members come to their work with an understanding of cooperative enterprise.



*Students join in The Industrial Commons' art supported program, TOSS, to explore issues around culture, race, environmental sustainability and the future of work. Photo: Kathryn Ervin*

**Values Play an Explicit Role:** The examples we saw showed how a well-articulated and shared set of common values is both an intrinsic and necessary element of a successful cooperative ecosystem. “The normative framework is really important” noted one of our Italians friends. The Italian cooperative movement is a particularly interesting case in point because the two strongest intellectual currents in the maturation and growth of the entire movement—and the institutions they are most closely aligned with—seem diametrically opposed. The Communist party was the common element and driving force behind the most powerful network of Italian cooperatives; yet the Catholic church and Catholic social teachings played a similar role in a different network of cooperatives, also large and successful. These two institutions might not agree on much, but cooperativism (at least in Italy) was one thing, and a very important one. While outwardly dissimilar, what the Church and the Party—importantly, those

<sup>7</sup>“indivisible reserves” is the cooperative practice of allocating a portion of profit to the general good of the cooperative, rather than the benefit of any individual member. By law, in Italy, Spain, Quebec, and several other countries, such reserves can never be accessed for person gain, but must be passed on to another cooperative in cases where the business is sold or disbanded.

<sup>8</sup>p. 57

institutions as they existed and were understood in mid-20th century Italy —had in common was a shared vision for a better world. Equally importantly, this vision encouraged people to articulate, discuss, participate in, and generally see their role as a part of something bigger than themselves. This coincided directly with the cooperative structures of participative democracy, common enterprise and the formation of institutions designed to last for generations. These aligned values helped people feel comfortable with cooperatives, and embrace them as a regular part of their everyday lives, as Church and Party were already.

**Stewardship as the operative concept rather than Ownership:** U.S. cooperators refer often to the existential triumvirate of “ownership, control and benefit” all being held by the members of any cooperative, a fact that categorically differentiates the form from investor-owned entities in the U.S. economy on the one hand, or charitable organizations on the other. But a key differentiator of these very successful cooperative ecosystems is a set of operating principles and practices that are much more aligned with the notion of “stewardship<sup>9</sup>” of shared assets, rather than ownership. The concept of “stewardship” aligns strongly with the orientation toward considering the needs of future generations as well as current members, and also carries with it an implicit acknowledgment of the sacrifices of those preceding us. Operating within a shared mindset of care-taking as opposed dominance enables generations of leaders within these cooperative ecosystems to make decisions that result over time in building institutions of remarkable depth, breadth and fortitude <sup>10</sup>.

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We found differences as well, of course. Not all cooperatives, for example, necessarily classify themselves as part of the “social economy.” While this self-identification was clear in Quebec and in particular in South Korea<sup>11</sup>, representatives of other cooperative systems were more ambivalent about the term, and did not necessarily seek out this identification— at least not consistently or universally.

We also noted that the balance between export orientation and meeting local needs was not the same everywhere, or at every time. The industrial cooperatives of Northern Italy build their prosperity on the sales from outside of their region and country. Thirty percent of the Italian cooperative systems revenues come from

<sup>9</sup>In the traditional language of property rights, the cooperatives would retain the rights of “usus” or use and the right of “fructus”, that is, to enjoy the benefits of the property, but they would forgo the third property right of “abusus”, the right to sell or destroy what is owned.

<sup>10</sup> For more on the operational concept of stewardship in the context of the contemporary Italian cooperative system see “Stewards of Enterprise: Lessons in Economic Democracy from Northern Italy” by Margaret Lund and Matt Hancock, International Centre for Cooperative Management, Sobey School of Business, St. Mary’s University, Halifax, Canada, Working Paper 2020/01.

<sup>11</sup>Who modeled much of their efforts on experience of Quebec.

outside of Italy<sup>12</sup>. The Mondragon cooperatives as well have used their manufacturing prowess and effective financial systems to build an impressive book of business outside of their modest home region. Faced with the same daunting prospect of newly open European markets, the Finnish cooperatives took a somewhat different stance. There, they let private companies take on the risk and reward of export, while the cooperatives concentrated on keeping the home market stable and well-supplied<sup>13</sup>.

A third difference that must be acknowledged is the mature nature of some of these ecosystems. The three largest, most comprehensive and most successful (Quebec, Mondragon and Northern Italy) are all decades old. Each has their roots at a very different time, in very different political, economic and social contexts. Yet even if the political or social environment were to be similarly conducive to cooperative development in the U.S. today, the fact remains that the strategies that might be attempted successfully in a stable, diversified comprehensive and well-established structure of aligned thought and systemic sustenance are quite different from the strategies that might be successful in a context where these ideas and supports are only emerging, at best. This is not to say that these ecosystems cannot be powerful influencers of decision-making in the U.S. context. But it is important to be aware of the differences that exist between what is possible in a mature system versus one that is still emergent.



*Members of the industrial cooperative, the Carolina Textile District, participate in a lean manufacturing charette at their annual Gathering.  
Photo: Franzi Charen*

<sup>12</sup>Matt Hancock, "Compete to Cooperate" p. 51

<sup>13</sup>Skurnick, Samuli and Lee Egerstrom, "The Evolving Finnish Economic Model: How Cooperatives Serve as 'Globalisation Insurance'", paper presented at the International Cooperative Alliance Research Conference, University of Saskatchewan, Saskatoon, Canada, May 29, 2007.

## LEARNINGS TO BRING HOME:

In many and diverse ways, our armchair journey affirmed our belief in an ecosystem approach to community-based industrial development, and gave us more information and context to better understand others' history and strategy. It also gave us some new ideas, and helped us to think more strategically about TIC activities, both new and existing. Some key learnings from our journey include:

**Networks and alliances play a fundamental role in successful cooperative industrial development.** In Quebec, it was the cooperative movement's alliance with the Social Economy infrastructure that allowed them both to approach provincial government with compelling evidence that the non-investor-led economy was actually responsible for more jobs than several large industries put together. Fractured, they were viewed as peripheral and unimportant; aligned, they commanded attention and resources. Both local (cross-sector) and industry-specific networks of cooperatives are a hallmark of the Italian cooperative system as well. Italian cooperators also noted that the cooperative-to-cooperative distribution chain in Italy is a huge asset for all. And in Mondragon, the inter-cooperative alliances that have developed—both mandated and voluntary—are a critical part of the system's success (although interestingly, it was not part of the original vision). Working together on one thing just naturally leads to new ideas for more ways to join together. "If you meet together all the time like we do, you find ways to cooperate" observed our friend from Mondragon.



*Members of Opportunity Threads, a sustainable cut and sew cooperative, are supported in a training with simultaneous interpretation by Cenzonele Language Justice Cooperative. Photo: Franzi Charen*

**Self-development for worker-members can (and should) take many forms.** The Arizmendi Association's thoughtful investment in broad leadership skills for their workforce ("leadership is a role not a person") was a really concise, clear and compelling illustration of the significant effect that a cooperative can have on the self-development of each member. The Arizmendi program on leadership would fit nicely alongside The Industrial Commons existing programs for worker-members, which include Open Book Management financial training, Coaching Supervision, as well as ongoing work on racial justice and use of popular education tools.

**"Continuous Improvement" is just as important for making organizations work better as it is for improving products.** The Mondragon cooperatives,

for example, engage in an exceedingly thorough and inclusive process of strategic planning and reflection that ensures that every member of the cooperatives feels included, and that everyone is brought into the resulting plan. This helps the entire cooperative system act more efficiently, and importantly, also allows for greater flexibility in responding to a changing international market.



**Place-based and Industrial strategies are not mutually exclusive, or even opposed:**

We saw from several of our cooperative informants how they were able to bring new revenue into their communities from outside customers, but at the same time excel at delivering vital goods and services to neighbors. If one is thoughtful about its execution, one kind of specialization does not need to necessarily preclude the other.

**The tension between independence and inter-dependence is ever-present.**

While the benefits of sophisticated cooperative networks and systems is certainly compelling, a concept that is sometimes given insufficient attention is what may be lost in an overly structured system. Members of Mondragon cooperatives, and the cooperatives themselves “give up some not miniscule part of their autonomy in order to be part of the group” noted the Mondragon expert. Even in the most successful network of worker-owned cooperatives in the world, they find themselves constantly juggling the tension between the individual and the group, and that friction we learned, never really goes away. Taking the time to regularly revisit and reconnect to a centralized vision of the whole helps to keep the various parts of the cooperative system aligned, as does an amount of flexibility between which associations are voluntary, and which mandatory. This flexibility leaves room for differences to exist within the common system, and is an important lesson for those seeking to replicate the Mondragon success.

**Investment in consistent data collection can yield big dividends.** We learned that cooperators in Quebec have been consistently collecting data on job creation and other measurable economic impacts for 20 years. When the opportunity arose, they could then leverage this information (along with their social economy partners) to demonstrate empirically that the cooperative and social economy sector played a larger positive role in the Quebec economy than many other traditional industrial sectors, and was therefore worthy of significant respect and public support. Such data collection formed the basis of significant public policy support for the cooperative sector.

**Social Cooperatives are an interesting new take on cooperative development.**

We had been thinking mainly of jobs in industrial production, but the positive example of cooperatives working in a multi-stakeholder fashion to deliver an array of vital social services got us thinking about cooperatives in a different context.

**Enlightened public policy and some solid, multi-year funding can make a lot happen in a short period of time.** The cooperative movement in Seoul, South Korea has had a huge impact in only a decade. This was made possible by the combination of proper funding and municipal leadership with a depth of previous understanding of cooperatives and social enterprise.

**Being good at some things actually makes it easier to be good at another.** Just as Italian cooperative manufacturing set the stage for effective social cooperatives to emerge 40+ years later (and TIC’s early investment in the Carolina Textile District made it possible to quickly turn to production of much-needed PPE when the pandemic hit) so a successful export-oriented structure

does not necessarily preclude a parallel strategy for providing local goods and services. Investor-owned companies and industries often drain local resources and capacity, leaving the shell of an empty factory (and community) when they eventually close up shop and move on. Our guests showed how it is possible to choose a different future, and use the resources generated from outside revenues to expand local capacity rather than sap it dry.

**Cooperative systems must grapple with the concept and practice of insiders versus outsiders.** Place-based systems of all kinds often fall naturally into definitions of who qualifies as an “insider”, that is, who “belongs” (in some instances, one has literally to be born into this role to have a chance at succeeding). Similarly, as much as a different language or culture might keep a person on the outside of important political and social institutions, it also serves to embrace them warmly and securely as the consummate insiders within their own birth culture and its institutions. All of these cooperative ecosystems have some aspect of this “insider/outsider” culture at work. Starting from a base of common lived experience for members is a really important shortcut for participants to begin to see themselves as aligned in other ways. It also can lead to tremendous loyalty once someone is ensconced within the system. In the Mondragon cooperatives, with their policy of zero layoffs, “there is a chart, and everyone’s name is on it.” For a manual worker with limited education, the value of that kind of promise cannot be overstated. Yet if practitioners are not careful, the natural “insider” nature of cooperatives can stand in the way of their meeting their potential as transformative vehicles of social justice. At the same time as they are being urged to see others with whom they share something important as allies, cooperative members also must be pressed to see the value of including someone who is not like them—maybe an immigrant— in their collective vision of who “belongs here”; that is challenging for many of us. This is not something the advanced cooperative ecosystems have figured out yet—the cooperatives in both Mondragon and Northern Italy still struggle with how to integrate the workers of foreign subsidiaries they have acquired. We got no easy answers from our tour; only an affirmation of the power of social bonding, and an understanding that efforts work well to begin there, but that cannot be where they end.

**Cooperative values align strongly with values of Environmental Sustainability and Racial Justice.** While it is clearly important to be mindful of how cooperatives work to include or exclude various groups, it is also clear that cooperative principles and values of democracy, equity, equality and solidarity also make them powerful allies and instruments of both racial justice and sustainability.

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**You can with start where you are at.** In Quebec, cooperatives first rose to prominence in agriculture and credit unions for the simple reason that those were some of the few sectors where the provincial government had any real authority. This laid the groundwork for what years later would become a widespread and sophisticated system of cooperative development, and a credit union system in particular that is admired around the world. We can begin in those areas where we have ability and influence—however modest—and move outward from there.

### **CAN THIS WORK IN THE U.S.?**

From a U.S. perspective, some of these elements sound like natural extensions of work we are engaged in already; other features present much more of a challenge. It is extremely unlikely, for example, that we could ever get cooperatives enshrined in the U.S. constitution, as they are in Italy. From a young age, Americans are encouraged to exhibit independence of thought and action; solidarity can be a hard sell at times.

Yet, perhaps there is a peculiarly American version of all of this that can work. Americans are very entrepreneurial, and the side hustle, fortunately or unfortunately, is a common feature of American lives and livelihoods. Yet, entrepreneurship in a rural context looks quite different from the Silicon Valley vision. There are probably more elephants than IPOs in The Industrial Commons' backyard (that is, very few) and mostly people here cobble together part time jobs and supplemental income from a variety of business efforts just to get by. Rather than see this as a failure of any one entrepreneur to create the next Microsoft, we see it as a strength of our people that we can build on. People in rural areas are often good at hustling (as are other marginalized populations such as immigrants and urban working poor), and cooperatives can work to make that hustle easier and more productive—the "collective hustle" can make the individual strain more bearable, and help people make a better living from their efforts.

And despite our penchant for moving around, Americans are also not immune to the attraction of Place; one need think only of the common lifelong allegiances to the professional sports teams of one's childhood to wonder if there is not some way that even restless Americans might not understand the draw of Place.

Common values, clearly articulated, play an inextricable role in the building of institutions designed to last lifetimes and serve generations beyond our own. At the same time, talking explicitly about values is something that many Americans in our diverse and multicultural society find somewhat fraught and difficult—it is not a natural part of our common vocabulary, business or otherwise. This leaves American cooperators in something of a bind. With a toxic relationship between political parties, and no common state religion, it is not

immediately clear how to proceed. Yet we know that Americans of all kinds like to be part of something; they enjoy contributing, and are generous volunteers. While most American giving is still individually based (many individuals doing the same thing as opposed to collective action), we do like to feel part of a team. Although not dressed up in familiar political or religious garb, these are common values to build upon. The Mondragon promise of lifetime employment is a key illustration of how this might work. Implicit in this promise is the elevation of humans over money and capital. This makes the people involved feel “valued”, and they value the valuer in return. Most Americans would get that. While not presupposing or imposing certain political or religious points of view, there are more such common experiences and elements that bind us that we can work to identify and articulate.

## **PUTTING LEARNING INTO PRACTICE AT THE INDUSTRIAL COMMONS**

We have divided our learnings and the resulting proposed activities for The Industrial Commons into four primary categories:

### **1) Education/Stewardship/Generationality**

Recognizing that cooperative practices and values are not now widely familiar, we want to make it so. We will do this by starting early so kids can learn about cooperatives and social justice rather than having to “un-learn” less community-minded practices and attitudes later on. **Stewardship and education go together.** We will do this in a hands-on manner, **integrating the next generation at every turn**, so cooperation will become a lived experience for youth in our area, through Co-op Camps and similar extracurricular outreach efforts in **local K-12 schools**.

Poverty is generational in our part of the world, so **poverty alleviation must be generational as well.** We don’t only need a five year strategic plan, we need to articulate a **50-100 year strategic plan.** Involving local people in such a document will be a great way to encourage discussion of what we all want to leave to the next generation of community members.

Building up **support organizations such as insurance companies and finance** is also part of the 50-100 year time horizon. We can start now, even if our practice is small. We have seen that having such institutions in place greatly facilitates the next generation of cooperative enterprise, whatever that may be.

### **2) Policy and Metrics**

Inspired by our friends from Quebec and South Korea, we commit to begin to take a stab at **articulating and promoting the kind of public policy** that we have seen to be so effective in supporting and nurturing a cooperative economy.

Hand-in-hand with policy, will be **a new emphasis on metrics and building a praxis to policy pipeline.** We learned from Quebec that impactful stories, well-told through consistent documentation and data as well as words, will help to convince policy-makers that our visions

are aligned—our work is their work as well. In order to maximize learning and minimize unproductive variations, we can also take a page from the Quebecoise playbook and suggest standardized cooperative bylaws, membership documents and accounting systems.



Herron from Material Return sorts socks in one of the largest domestic garment take-back programs setting up our Western North Carolina region as the US capital of textile circularity. **Photo: Franzi Charen**

### 3) Market Accessibility

Our visit with other successful cooperative ecosystems affirmed our commitment to **keep a strong focus on Place, Industry as well as Environmental Sustainability and Racial Justice**, and in particular the nexus where they all intersect. Our strategy does not have to be either place-based or industry-specific and we do not have to forego environmental sustainability for success. It's not either/or, it's both/and. Combining the benefits of physical proximity with a deliberative focus on elements such as common supply channels, similar training needs etc. will help us make the most of both of these approaches.

Understanding that manufacturing is key to bringing new wealth into our poor region (while important for quality of life, services for the most part just move the same wealth around) and inspired by Italian and Spanish cooperative practice, we will redouble our efforts to **attract**

**capital and customers nationally and even globally, while building our supply chain from local elements.** Our current project with Smartwool® is an effort of this sort, and there will be more.

We are also affirmed in our practice of **building networks broadly**; allies don't have to all be cooperatives, and in fact in our market, they rarely are. We can find common purpose with many different allies.

Continued **emphasis on environmental sustainability is imperative.** Our vision of the future for our region and our community must include the future of the Earth.

#### **4) Human Development**

We understand that we are building jobs with our efforts, but more than that **we are building up people**; we are in the people development business. We will expand on our efforts to teach **basic business financial practice** through the Great Game of Business Curricula and Coaching Approach to Supervision, and add to that new elements inspired by the Arizmendi Association **leadership development** tools.

We will excel in the practice of what it means to be a **worker-steward**—that is, someone responsible for appreciating the past, nurturing the present, and passing along a viable business to future workers as opposed to just an owner of an enterprise seeking to maximize my benefit today.

**Racial justice must be an explicit part of our strategy** in a way that perhaps has not been the case in the other cooperative development systems we examined, except perhaps Arizmendi. Unlike most of the other systems studied, The Industrial Commons comes from a region that is rich in racial and ethnic diversity; it is one of our unique assets upon which we will build our cooperative economy. We use popular education tools and other strategies to make learning accessible with a clear analysis and praxis around being an anti-racist organization, embedding anti-racism and anti-oppression in all of our enterprises, training and practices.

#### **CLOSING THOUGHTS:**

It is true that we face a far harsher environment for cooperation in the U.S. than in many other places. But none of the impressive cooperative ecosystems we studied began from a place of affluence, monetary or otherwise. Borrowing tools from our friends and learning from their experiences, but building from the heart upon our own strengths and ingenuity is the lasting lesson from our armchair tour of cooperative ecosystems.



Members of The Industrial Commons cooperative ecosystem join their friends at PODER Emma for a gathering they call the “Power of the Commons.” The organizations are building a regional system to support cooperative growth and resiliency. **Photo: Franzi Charen**

## **APPENDICES**

- Appendix A:** The Ecosystem Development Organization Map
- Appendix B:** Timelines of important cooperative development milestones in Quebec, Mondragon and Northern Italy
- Appendix C:** Matrix of major cooperative development system elements in Quebec, Mondragon and Northern Italy



**Key to the map:**

- **Gold** = Why we do our work
- **Black** = How we do our work
- **Green** = What we're building
- **Blue** = Who we partner with

**POWER OF THE COMMONS = THE INDUSTRIAL COMMONS**  
**+ PODER EMMA**



## **ECOSYSTEM ORGANIZING: A GLOSSARY**

### **Overview of Our Work**

- **Ecosystem Organizing:** We nurture interconnected place- or industry-based cooperative ecosystems
- **Ecosystem Development Organizations:** We seed, feed, & grow cooperative ecosystems regionally
- **Community-led Development:** Our work is rooted in / emerges from communities on the margin
- **Circular Development:** We commit to environmental stewardship, to a green, circular economy
- **Our Long-term Outcome:** A robust, just, green, inclusive, community-led regional economy

### **How We Do Our Work**

- **Cooperative Development:** We support thriving business, industry, housing, and social coops
- **Education & Training:** We provide high-quality multi-lingual training that is contextualized locally
- **Business & Market Development:** We train people on how to build successful, long-term businesses
- **Cultural & Community Organizing:** We build collective power from people's lived experiences
- **Network Development:** We build networks of coops, businesses, manufacturers, and other entities

### **What We're Building**

- **Industry Cooperatives:** Cooperatives or networks based in specific manufacturing industries (e.g., [Opportunity Threads](#), [Collection](#), [Material Return](#), [Carolina Textile District](#), [The Industrial Commons](#))
- **Worker-Owned Businesses:** Cooperatively owned and managed businesses (e.g., [Cenzontle Language Justice Cooperative](#), [Good Books](#), [Power in Numbers](#), [Chispas Property Management](#))
- **Housing / Real Estate Cooperatives:** Cooperatively owned and managed land, housing, real estate (e.g., [PODER Emma's six housing / real estate cooperatives](#) totaling 44 units of affordable housing)
- **Social and Community Cooperatives:** Cooperatively owned or managed social services coops or networks (e.g., [Preescolar La Bugamibilia](#), [TOSS](#), [PODER Emma Early Childhood Network](#))

### **Who We Partner With**

- **Markets:** Our work is rooted in / driven by markets, both place-based and industry-based
- **Funders / Lenders:** Our work requires both grants and patient, community capital
- **Institutions:** We partner with and leverage local institutions (e.g., Government, Education, EDCs)
- **Policymakers:** We collaborate with decision-makers to create coop-friendly policies

### **The Roots of Our Work**

- **Social Justice:** A commitment to racial, economic, and language justice is at the base of our work
- **The Commons:** We envision resources available to all, managed cooperatively for collective benefit
- **Organizing:** Our work has roots in community organizing, popular education, immigrants' rights
- **Values-Based Markets:** Yet our work is also driven by markets; we build profitable, viable businesses
- **Participation:** Local people collectively own and control their labor, livelihoods, land, housing, lives

### **The Impacts of Our Work**

- **Worker-owned businesses created:** We track the number of new businesses created / converted
- **Livelihoods created:** We track new jobs created (e.g., pre-post data on wages, benefits, job quality)
- **Cooperative membership:** We track the overall number of members / employees (e.g., race, gender)
- **Number of people trained:** We document number of people / hours in our trainings, & our topics
- **Increases in civic participation:** We document volunteer hours, board participation, collaborations
- **Community assets owned:** Across ecosystems, we measure collective revenue, assets, distributions

## Appendix B

### Timeline of Cooperative Supports – QUEBEC

Cooperative entrepreneurship has played a special role in Quebec for more than a century. The province is home to one of the largest credit unions in the world (Desjardins) and likely has the highest penetration of cooperative membership of any political jurisdiction in the world. The cooperative sector and provincial government enjoy a particularly close relationship in the region. Cooperatives receive significant public support in terms of technical assistance and financing, and in turn are relied on as core partners in meeting public needs and addressing common community issues.

Prior to and early 1900's – self-help co-op period (collective housing development both urban and rural, agriculture, insurance, health)

1900 – Desjardin's credit unions gradually founded, now the largest financial institution and leading private employer in Quebec and second most stable financial institution in the world several years in a row.

1906 – First cooperative Act

1964 – Cooperative branch of government established

1977 – Société de développement des coopératives founded, which in 1991 became part of Investissement Quebec to finance cooperatives

1983 – creation of the FTQ's development fund (today net assets \$16B+)

1984 – creation of the "Cirque du Soleil" as a worker collective

1985 – Formation of Regional Development coopératives (RDC)s based on the experience of the CCO (conseil des coopératives de Outaouais founded in 1974). Funded mainly by government, partly by the movement, places coop development professionals in each of 17 provincial areas.

1985 – Cooperative Investment Plan (CIP). Allows for 125% tax deduction for any investment in a coop by a worker or member.

1979 – Government body Investissement Quebec becomes specialist in financing cooperatives

1996 – creation of Fondation fund by the confederation of worker unions (CSN) – now worth \$2,3B

1997 – Summit on employment and economy – creation of the Chantier de l'économie sociale du Québec and launch of national daycare program (SSE), homecare and creation of new social finance tools (RISQ, FAQDD, etc).

2005 – Création of the Fiducie du Chantier de l'économie sociale – a fund dedicated to SSE infrastructure projects.

2003 – Co-op Development policy by government affirmed key role for cooperatives in economic development, spurred development in particular sectors etc.

2003 – new law exempts coop members from taxes on dividends if funds are reinvested in the coop.

2005 – New Cooperatives Act, establish indivisible reserves, reinforce distinct character of coops

2013 – Social economy framework law – recognizes SSE as a pillar of the Quebec economy and obliges govt to consider SSE organizations when designing and enacting new programs and to hold statistics on the sector. Adopted unanimously.

2014- centralization of Regional development co-ops to create a central structure – with the exception of the CDROL in the Outaouais-Laurentians which resisted and had its autonomy recognized and allocated its own budgets.

2018 – First portrait of Social economy in the 11 first nations of Quebec

2019 – first statistical portrait of Quebec's social economy sector – 12% of economy (more than aerospace and mining together)

**Results:**

Number of new coops 32% higher 2001-2009 than in the previous five years. 2006=2010 over 50% of new coops in Canada in Quebec, which has only 24% of population.

2008 study showed 5-year survival rate of coops 62% vs 35% for other businesses; 10 year rate 44% vs 19.5%.  
2007:

2900 Coops (2,410 non-financial, 320 financial, 30 insurance)

11,000 orgs for all of social economy

8.8 million members in coops / 13 Million total

90,000 jobs in co-ops, 220,000 in the SSE sector

Revenue \$22 billion CAD for co-ops and 47 Billion for the SSE sector

**Timeline of Cooperative Support Structure – MONDRAGON**

The Mondragon cooperatives are a very successful and highly integrated network of over 250 worker-owned and multi-stakeholder cooperatives employing more than 80,000 people centered in the Basque region of northern Spain. The cooperatives exist in all sectors, but particularly excel in advanced manufacturing, banking and food and consumer goods retail.

1939 – A metalworking firm (UCAM) in Mondragon, Spain started an apprenticeship school.

1941 – Father José Maria Arizmendiarieta arrives in Mondragon and begins teaching at the metalworking company's school, as well as engaging in extensive community organizing in addition to his clerical duties.

1943 – Arizmendiarieta, with donations from townspeople, opens a vocational-technical school for adolescents – the Escuela Profesional. School is open to all, given that the UCAM's apprenticeship school was limited to sons and siblings of UCAM workers.

1954- 1956 – Five workers purchased used equipment from a business being liquidated and with 20-some co-workers established an enterprise that would become the first industrial cooperative in Mondragon, ULGOR making paraffin lamps.

1956-1959 – ULGOR grew to over 140 workers; several other co-ops founded, including a consumer co-op store that would eventually become EROSKI, the chain of hybrid worker-consumer food stores.

1959 – The Caja Laboral Popular, a credit cooperative made up of four founding co-ops and the first secondary cooperative (cooperative of cooperatives) is founded, including the credit co-op's workers in a minority position in its General Assembly and its Governing Council. It later created an innovative "Empresarial Division" which helped to form new co-ops and advise others in difficulties.

1965 – three cooperatives found ULARCO, a network of co-ops, parts of whose businesses were in related markets. They share common sales, marketing, product development and to some degree, earnings. These kinds of common industrial groups for mutual support and business development would become a hallmark of the Mondragon system.

1969 – Lagun Aro, insurance / social security cooperative is established. As owners, co-op workers were considered self-employed and thus were deemed ineligible for many government programs so Lagun Aro was formed to provide health, pension, disability insurance and other workplace benefits. It was first established as a department of Caja Laboral, and in 1969 became independent and in 1973 was formally made a secondary cooperative.

1960's – 1970's – cooperatives continue to grow, many spinning off of successful previous cooperative ventures; as many as 11 new co-ops per year are founded in Mondragon; Caja Laboral Popular also expands rapidly, setting up dozens of branches in nearby communities.

1970 – 54 Cooperatives firms with over 8,500 workers

1974 – Ikerlan, a technological research institute structured as a multistakeholder co-op of co-ops + worker co-op, is founded.

1982 – There are 85 industrial cooperatives with over 20,000 members; in addition, there are cooperatives schools, agricultural co-ops, service cooperatives and housing cooperatives. In addition to Caja Laboral Popular and Lagun Aro,

other secondary or multi-stakeholder coops include Ikerlan, a technological research institute and a business school. ULGOR, under the brand name "FAGOR" has become a leading manufacturer of durable home appliances.

1986 – Spain enters the European Economic Community, ushering in a period of significantly enhanced competition for the Mondragon industrial cooperatives.

1989-91 – Mondragon Cooperative Corporation (MCC) was formed encompassing all of the cooperatives plus ancillary institutions such as the university, banking, insurance etc.

2000's – rapid expansion of Eroski, the consumer cooperative, as well as acquisition or startup of dozens of overseas manufacturing subsidiaries (140) leading to the existence of many non-member workers; in 2019 over half of the systems 82,000 person workforce were not worker-owners.

2008 – Name changed to simply "Mondragon".

1980's – 2012 Spanish banking law forces Caja Laboral Popular to divest itself of much of its cooperative portfolio; technical assistance services are shifted to the cooperative networks or the consulting cooperative, LKS while venture capital services are now provided by a special venture capital fund. In 2012, Caja Laboral merges with another credit union Ipar Kutxa and the new entity is called Laboral Kutxa.

2013-2014 – FAGOR, the flagship industrial cooperative of the entire Mondragon system, files for bankruptcy; over the next two+ years, the system, working with other cooperatives, found job placements or arranged early retirement for practically 100% of the co-op's 1,900 displaced worker-members. Displaced workers received 80% of their pay while in waiting periods for transfer to another co-op.

### **Timeline of Cooperative Supports – Italy**

The cooperative system in Italy is one of the most diverse and comprehensive in the world. There are over 81,000 different cooperatives in Italy employing over 1.5 million people. Sales from the sector represent a total of 8% of national GDP. Cooperatives exist all over Italy, but are particularly strong in the North, centering in the region of Emilia-Romagna and its adjacent regions of Tuscany, Lombardy, Piedmont and Veneto. With a population of only 4.4 million people, Emilia-Romagna is responsible for 35% of all cooperative revenue in the country, and is home to half of the largest co-ops in the country.

1854 – First legal cooperative established, a consumer cooperative in Torino

1856 – First Italian worker cooperative established in Liguria

1886 – 248 cooperatives representing 70,000 members form the first national association of cooperatives

1919 – the federation splits into two, representing Catholic cooperatives (confcoop) in one and those tied to Socialism staying in the original association (Legacoop)

1945 – Basevi Law – sets up requirement for indivisible reserves in cooperatives; discourages demutualization and introduces supervision.

1947 – The constitution of the Italian Republic is adopted including Article 45 which states: "The Republic recognizes the social function of co-operation of a mutually supportive, non-speculative nature. The law promotes and encourages cooperation through appropriate means and ensures its character and purposes through appropriate checks".

1977 – L. n. 904 Indivisible reserves become exempt from tax, as a way of making it easier for co-ops to finance growth, since their ability to use outside capital was limited.

1983 – L. n. 72 Law is amended to allow cooperatives to establish, acquire and participate in stock and limited companies

1985 – L. n. 49 "Marcora Law" promotes the establishment of cooperatives by workers of businesses in financial crisis

1991 – L. n. 391 Law passed formalizing the existence of and regulating social cooperatives (they existed before the law).

1992 - Law requires contribution of 3% of profit by all cooperatives to be contributed to a development organization (COOPFOND, etc.) to promote the formation of new cooperatives and expansion of existing ones

1992 – L n. 59 passed allowing cooperatives to use financial instruments such as bonds in order to attract outside (non-member) funds. The holder of the financial instrument is not allowed governance rights.

2001 – L n. 142 Concerning the worker member, affirming worker-members of cooperatives have the rights of each and establishing rules designed to ensure that the assembly of members remains the sovereign decision-making body and requiring that certain decisions be discussed and voted on by all members.

2003 – D.L. n.6/2003 acknowledges tax advantages for cooperatives that are “prevalently mutual”, that is, having 50+% member-owners.

2004 – L.n. 311 reshapes fiscal regulation of cooperatives and their associations, making a distinction between those that are prevalently mutual and others and reducing the tax exemption for indivisible reserves. For predominantly mutual cooperatives, indivisible reserves became 70% tax deductible, for other cooperatives only 30%.

2011 - The 3 main cooperative federations formed the Alliance of Italian Cooperatives (Aleanza delle Cooperative Italiane) to coordinate activities and speak with a united voice

## Appendix C

COOPERATIVE ECOSYSTEM ELEMENTS			
	QUEBEC	MONDRAGON	ITALY
<b>INFRASTRUCTURE:</b>			
<b>Capital</b>	Des Jardins credit union flagship entity of whole system, provides personal and small business loans; now government corporation (investment Quebec) provide guarantees to coops and social enterprises; co-op investment vehicles worth \$billions	Caja Laboral; central feature of system providing start-up funds for new cooperatives	Yes - through cooperative development funds and other vehicles
<b>Education</b>	Cooperative bookstores at universities etc. Incubators for youth; co-ops very popular with young people	Mondragon University; technical college central to start-up story	Yes, specifically cooperative entrepreneurship education and promotion of UN sustainability goals
<b>Second level Auxiliary institutions -- Insurance, real estate etc.</b>	Desjardin has insurance company, real estate etc.	Social welfare insurance was forced on the system early; soon hospitals, more schools, other institutions became part of system	Yes - highly developed institutions such as cooperative insurance
<b>Networks - purchasing, peer exchange, political capital</b>	Dozen sectoral associations, secondary cooperatives; RDCs also support regional cooperation; government branch	Very tightly intertwined	Yes - reportedly lots of cross-sector buying, formal and informal networking
<b>Technical Assistance, nurturing</b>	Yes, government funded RDC offices all over since 1985	Yes - mainly as business units within existing coops; not independent start-ups	By industry from co-ops in that industry; also regional technical assistance
<b>Industry-specific research centers</b>	Some sectors	Yes - not in every sector, but in many. Some are very specialized.	Yes, for some industries
<b>CONTEXT:</b>			
<b>Policy environment</b>	Series of statutes, provisions supporting cooperatives; co-op assistance from government since 1964; all important co-op provisions are part of one law "Napoleonic code" so fewer choices about structure, more decisions already made in law	Protection for domestic industry at the beginning; prey safe and stable environment to grow; Also Basque co-op law requires reserves and community contributions	Strong - co-ops enshrined in the 1947 constitution; tax advantages; recent support for conversions, new law for social co-ops and 1992 law for co-op mutual funds
<b>Economic/Capitalism context</b>	Quebec traditionally had higher unemployment, was excluded from some economic activity due to language and cultural barriers	Mid-century	Large growth post-war; some sectors like social co-ops and conversions growth is more recent
<b>Regional/ Place-based identity</b>	Strong ethnic and language identity	Strong ethnic and language identity at first, although in-migration makes area more diverse now; small town identity strong; self sufficiency at first, then export also.	Yes - strong alignment with Northern Italy
<b>SOCIAL CAPITAL/ VALUES:</b>			
<b>Prior identity separate from the ecosystem?</b>	yes	yes	Yes - communist party and Catholic church link to values
<b>Explicit, values-based development?</b>	Yes - government offices staffed with people to develop coops; government financing for social enterprises and coops	Yes - have own enhanced coop values for workerowned coops; although subsidiaries not necessarily coops	Yes - co-ops enshrined in post-war constitution specifically as a more values-based mode of development
<b>Support other quality of life institutions -- arts, social services etc.</b>	Yes- systemic public policy approach to all sorts of things	Yes - 10% of surplus to community (Basque coop law). Clinics, dozens of co-op schools, Basque dance, music, cultural associations	Yes - at some point, ER one of highest per capital spending on the arts in EU
<b>Long term community ownership/stewardship?</b>	Yes -- minimum of 20% surplus to indivisible reserves (or 10% reserve, 10% stock) until reserve = 40% of liabilities.	Yes - cannot sell collective reserves; get individual capital account balance upon leaving the co-op	Yes; indivisible reserves part of practice before required by law; even with change to lower requirement, many co-ops still contribute more
<b>Financial contributions to system from others (without resentment)?</b>	Tax deduction of 125% of any capital invested in the coop by workers or members (CIP)	Yes - explicit profit-sharing with other coops in group and with community; 20% to reserves by Basque co-op law, in practice this is usually 45%	Yes - required contribution to development funds administered by Apex organizations
<b>PITFALLS</b>			
<b>What about when it didn't work?</b>	Domination by Desjardins, generally conservative nature inhibits some innovation; some over-stepping, unnecessary conformity, centralization of RDCs	Historic strike, led to smaller coops; continued market pressure.	Exportation to other parts of Italy not as successful as in the North

## **Margaret Lund – Bio**

Margaret Lund is an independent consultant specializing in the areas of community development finance and shared ownership strategies. Throughout her 30-year career, Margaret has worked with enterprises in every major cooperative sector including credit unions, consumer co-ops, housing co-ops, worker co-ops, health-care, agriculture and small business cooperatives. Prior to launching her consulting practice in 2008, Ms. Lund spent 16 years as a small business lender to cooperatives.

Ms. Lund is a past member of the board of the U.S. National Cooperative Business Association where she chaired both the Cooperative Development and International Development committees as well as a national task force on cooperative capital formation. She also served three terms on the board of Health Partners the largest consumer-governed healthcare organization in the United States and a leader in healthcare quality measures. Currently, she is one of three trustees overseeing the Cooperative Charitable Trust, a catalyst for research and innovation in worker ownership.

Ms. Lund has been featured as a speaker, trainer and panelist at over 100 venues representing a wide range of organizations including the National Credit Union Administration, the National Association of Housing Cooperatives, the Consumer Cooperative Managers Association, and the U.S. Federation of Worker Cooperatives. She is also the author of several publications on timely cooperative topics, including “Cooperative Equity and Ownership” published by the UW Center for Cooperatives; her manual “Solidarity as a Business Model: a Multi-stakeholder Cooperative Manual” is a frequently cited resource on this important topic, both domestically and internationally.

Past awards include the Howard Bowers Cooperative Service Award from the Consumer Cooperative Managers Association and the 2014 John Logue Award for “acting as a catalyst for innovation and change” from the Association of Cooperative Educators.