

**LIFELONG LEARNING PROGRAMME**

**2007 – 2013 - selection 2007**

**MULTILATERAL PROJECTS - DEVELOPMENT OF INNOVATION**  
PRIORITY 5 - VALIDATION OF NON-FORMAL AND INFORMAL LEARNING

**AGREEMENT No 2007 – 1970 / 001 – 001 LE3-MULPRO**  
Action entitled “LLP/LDV/MP – ‘SKILLS’ (*Skill and Knowledge within Innovative Lifelong Learning System*) – 133981-LLP-1-2007-IT-LEONARDO-LMP”

**PREP1 - BALANCE OF SKILLS**

**D.1.2. BALANCE OF SKILLS**

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# SKILLS - SKILLS KNOWLEDGE WITHIN INNOVATION LIFELONG LEARNING SYSTEM

## D.1.2. BALANCE SKILLS

### 1. PREMISE

The work on the balance of skills was developed by the partners that are representative for the different cooperative systems involved (KUS, LANKI, FTC and ABPSHE). The other two partners (KTP and STPKC) worked on the sharing and discussion of the work done, constructing the following common conclusions and guidelines for the future work.

Starting point was the sharing of a model structured in different parts:

- *The cooperative system in the participant countries/regions.* This first part describes the different cooperative systems in order to present and compare the different learning contexts of interest for the project.
- *The learning structure in the cooperative system of the participant countries/regions.* This part collects information about the existent learning systems in the cooperative contexts involved as premise for the following analysis of the formal, non-formal and informal learning occasions.
- *The skills for the 'good and aware co-operator'.* This part analyses the skills that the cooperators consider important for their role. The partners worked on this part using no-structured interviews and focus groups.

The work done by the partners is collected as annexes to this document.

Some questions and conclusions emerged by the comparison of the information and skills collected by the partners and their sharing during the First Project Meeting (Lapland, June 12th – 13th 2008). Items discussed were: the customisation of the definitions of reference of formal, non-formal and informal learning in order to analyse correctly the existent learning systems; the identification of common target groups as final users of the proposed learning system; the identification of the skills that will be the object of the learning system.

## 2. WHICH ARE THE DEFINITIONS OF REFERENCE FOR FORMAL, NON-FORMAL AND INFORMAL LEARNING?

In order to analyse correctly the existent learning systems and answer to the general objective of the project to develop an innovative learning system, validating existent non formal and informal learning and combing them with different methodological approaches and innovative contents for training co-operators to become more aware and active, starting point was “The EC (2001) Communication on Lifelong Learning: formal, non-formal and informal learning” and the following definitions:

1. **“Formal learning:** learning typically provided by an education or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner’s perspective.
2. **Non-formal learning:** learning that is not provided by an education or training institution and typically does not lead to certification. It is, however, structured (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner’s perspective.

- 3. Informal learning:** learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional but in most cases it is non-intentional (or “incidental”/ random).”

The work on the specific field of the cooperative systems needed to have some examples of reference for better analysing these contexts. The EC definitions were customised considering some examples as reported in the work done by LANKI and agreed by all the partners during the meeting. So, examples of reference for the analysis of the existent learning systems were:

1. The cooperatives involve their members in different actions like technical-professional training courses for improving the professional skills (based on the right of the co-operator for training as it is foreseen in the cooperative law) [**Formal learning**]
2. Courses, seminars and workshops in specific areas, both in technical and socio-institutional skill improving. Information and advice services on accounting, compiling balance sheet or legal matters. [**Non-formal learning**]
3. The long tradition in the cooperative field transferred from a generation to another. The day to day experience working in the cooperative and actively participating to its activities is the other important point for informal learning. [**Informal learning**]

### **3. WHICH WILL THE TARGET GROUPS OF REFERENCE BE?**

The cooperative systems involved in the project have structures, roles and member roles that are very similar and based on the general principles of the cooperation. The need to identify the target groups for the learning system emerged by the recognised presence of different kinds of members that have roles and develop activities that are a little bit different in the different systems involved. The discussion highlighted also the common need of a basis training that allows to the cooperators to understand the cooperative system of which they are part. So, the partners agreed to have all the kinds of members as targets groups of a basis training.

Another item of discussion was the role of teachers/trainers in the project. The learning system was here defined as a toolbox to support them in the training of the cooperators but also the validation of non-formal and informal learning occasions. So, the role of teachers/trainers will be very important in the testing and developing of this toolbox and they will be involved in the testing events organised in the second year of the project.

### **4. WHICH WILL THE SKILLS OF REFERENCE BE?**

The work of the partners highlighted the importance more or less of all the skills indicated in the used grid. This is also the consequence to have a grid that collects all the possible skills for any activity. In spite of this, the partners recognised a common need to develop specific skills and knowledge for reinforcing the cooperative identity and validating informal actions that promote cooperative principles and values.

The following scheme represents the level of importance of the different skills for the co-operators:

- personal and technical skills were recognised as important but easy to gain in the analysed cooperative systems;
- transversal and ethic skills were recognised as important and difficult to gain with formal learning;
- knowledge of the cooperative system (with specific attention for its principles and values) and the local context were recognised as necessary skills for developing a

cooperative behaviour that distinguishes the co-operator from other kinds of enterprise members.

The partners agreed in considering this scheme as summary of the work done on the balance of skills and starting point for the construction of the skill framework.

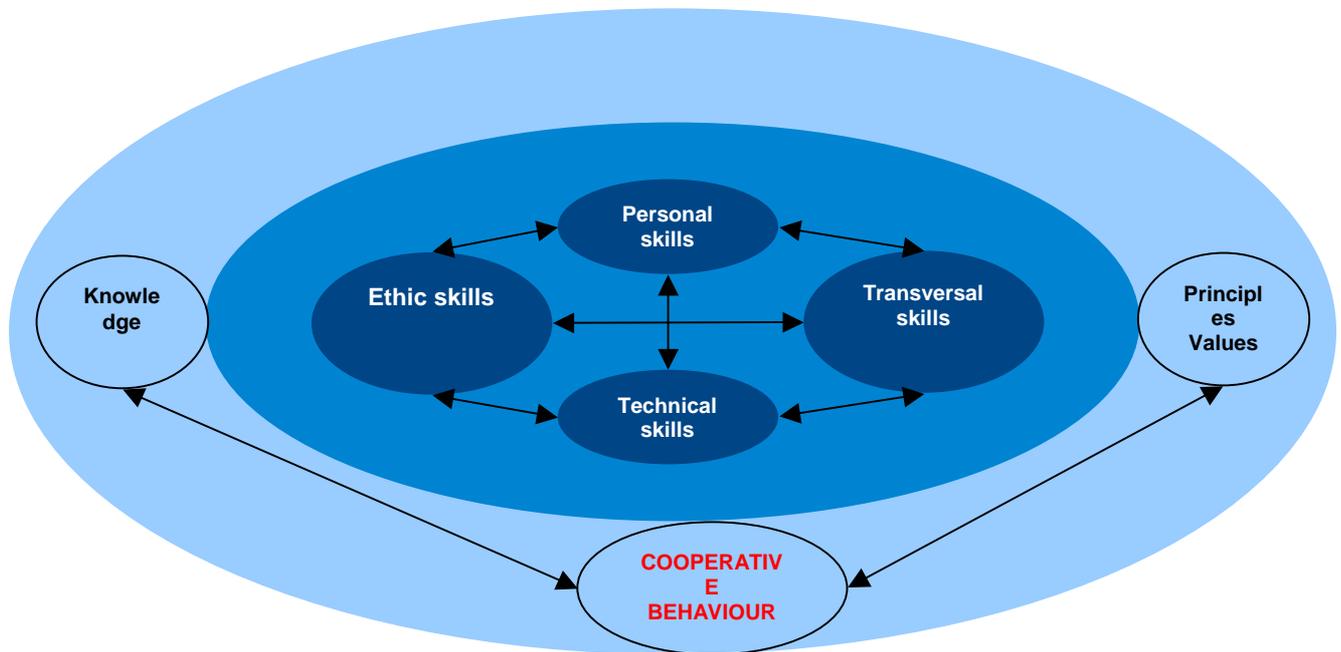


Figure 1. The skills for the 'good and aware co-operator'

## 5. WHICH WILL THE FUTURE OF THE WORK BE?

This is the first SKILLS model constructed to respond both to the need of training of specific targets, and to analyse and validate the existent non formal and informal learning opportunities on the basis of a shared balance of skills. The system will give a general model for the validation of the pre-existent non formal and informal learning in the cooperation world.

## Skills balance – model 1

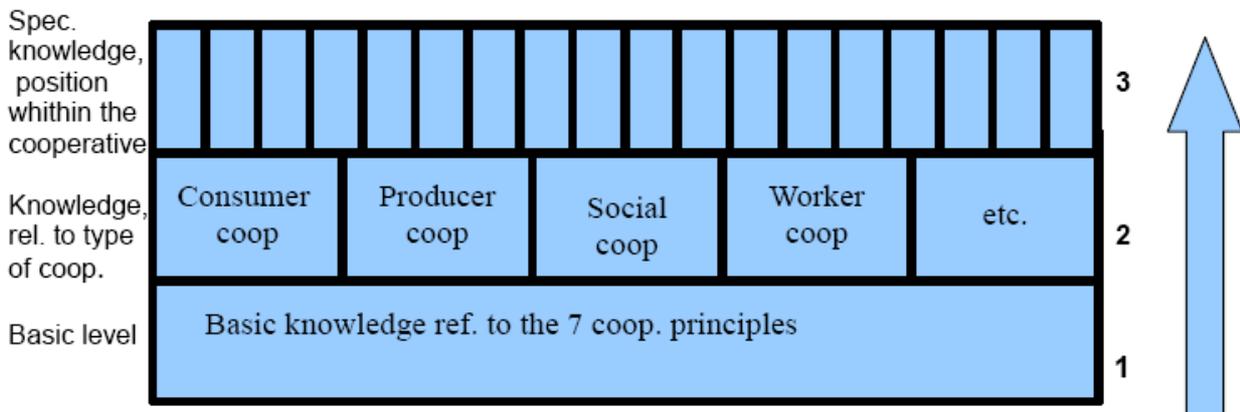


Figure 2. First model of balance of skills

The learning target are built up according to different type of cooperatives and different roll within the cooperative, starting at level 1.

It is important to beforehand identify the target group for the Skills Balance; teacher/trainer or members of the cooperatives.

Two questions of importance:

2. What shall the participant/member know
3. How do we know that the participant/member knows?

### Performing the Skills Balance:

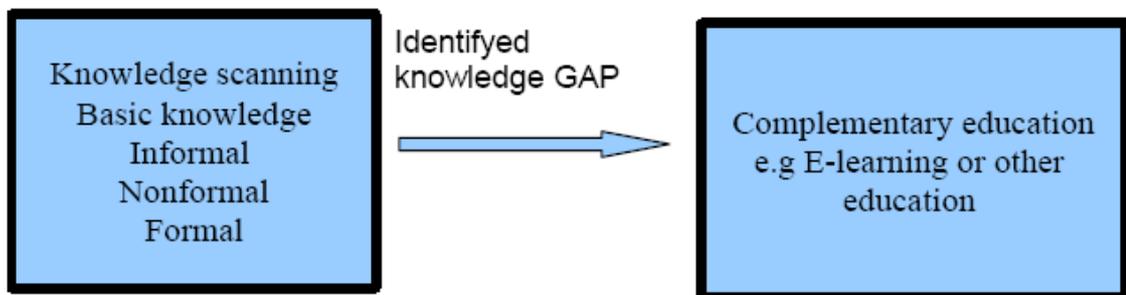


Figure 3. The knowledge gap

SKILLS will develop an innovative learning system, validating existent non formal and informal learning and combing them with different methodological approaches and innovative contents for training co-operators to become more aware and active.

## 5.1. THE FORMAL, INFORMAL AND NON-FORMAL LEARNING SYSTEM

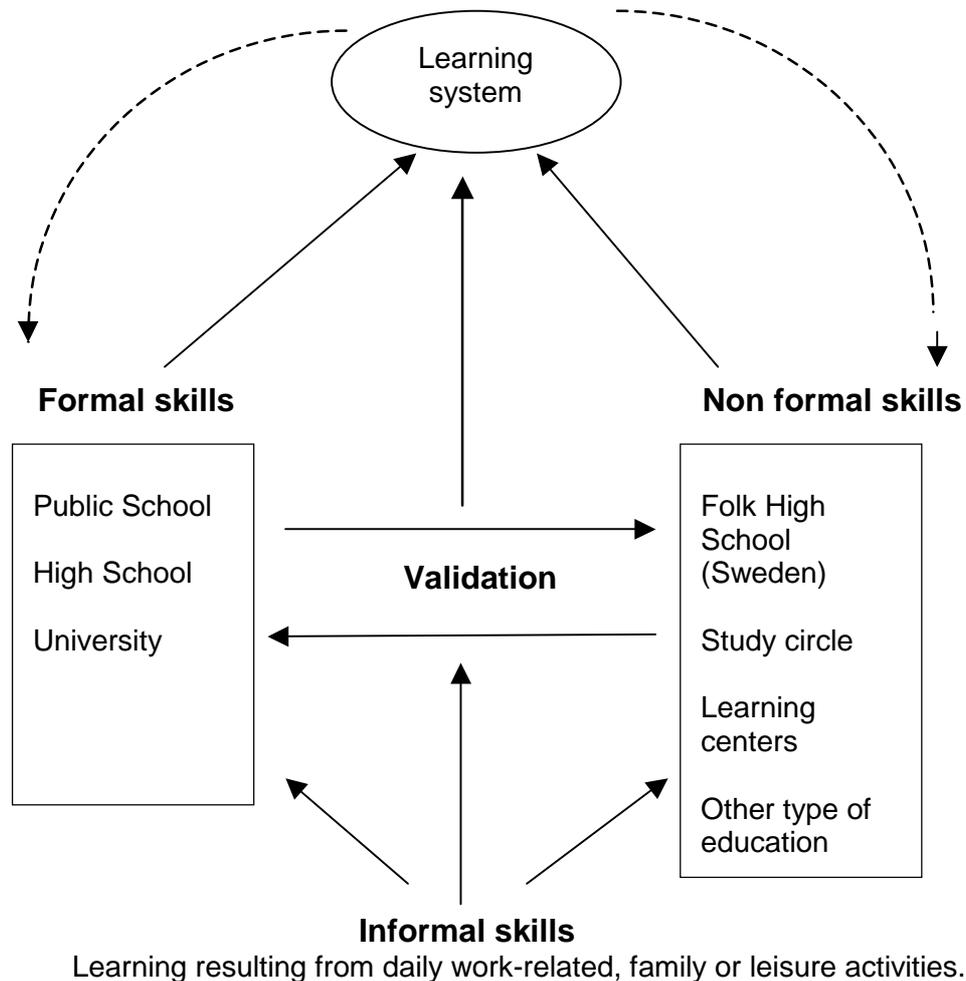


Figure 4. The role of the learning system

## 5.2. THE COOPERATIVE PRINCIPLES

According to these conclusions, other starting point for the future work will be the ICA (International Cooperative Identity) definition of cooperative and principles.

**Definition:** A co-operative is an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise.

**Values:** Co-operatives are based on the values of self-help, self-responsibility, democracy, equality, equity and solidarity. In the tradition of their founders, co-operative members believe in the ethical values of honesty, openness, social responsibility and caring for others.

**Principles:** The co-operative principles are guidelines by which co-operatives put their values into practice.

**1st Principle: Voluntary and Open Membership**

Co-operatives are voluntary organisations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political or religious discrimination.

### **2nd Principle: Democratic Member Control**

Co-operatives are democratic organisations controlled by their members, who actively participate in setting their policies and making decisions. Men and women serving as elected representatives are accountable to the membership. In primary co-operatives members have equal voting rights (one member, one vote) and co-operatives at other levels are also organised in a democratic manner.

### **3rd Principle: Member Economic Participation**

Members contribute equitably to, and democratically control, the capital of their co-operative. At least part of that capital is usually the common property of the co-operative. Members usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any or all of the following purposes: developing their co-operative, possibly by setting up reserves, part of which at least would be indivisible; benefiting members in proportion to their transactions with the co-operative; and supporting other activities approved by the membership.

### **4th Principle: Autonomy and Independence**

Co-operatives are autonomous, self-help organisations controlled by their members. If they enter to agreements with other organisations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their cooperative autonomy.

### **5th Principle: Education, Training and Information**

Co-operatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their cooperatives. They inform the general public - particularly young people and opinion leaders – about the nature and benefits of co-operation.

### **6th Principle: Co-operation among Co-operatives**

Co-operatives serve their members most effectively and strengthen the co-operative movement by working together through local, national, regional and international structures.

### **7th Principle: Concern for Community**

Co-operatives work for the sustainable development of their communities through policies approved by their members.

## II. PARTNER: FTC

### D.1.2. BALANCE SKILLS

#### 1 The cooperative system in the participant countries/regions

##### 1.1 Describe briefly culture, identity and mission of the cooperative system of your country/region

Satisfying the economical, social and cultural needs and aspirations of shareholders in the first place is the aim of cooperative enterprises operating on the basis of democratic management and economical participation of shareholders. Therefore, the definition of cooperative enterprise itself suggests that being a cooperative means holding specific ethical values and principles to be followed trying to achieve the cooperative aims. In 2007, the Trentino Cooperative Movement approved its Statement of Value. The ethical values recognized as fundamental goods to be concerned about by being a member of the Trentino Cooperative Movement are: democracy, reciprocity, mutuality, equality, solidarity, equity, respect, trust, merit, attention towards others, humility, intercooperation, honesty, transparency, peace, social responsibility, sustainable development, freedom, subsidiarity.

##### 1.2 Describe briefly the present situation of the cooperative system in each country and the role of cooperatives in the national/regional economy.

The Italian Constitution declares that the Italian Republic recognises “the social function of cooperation with respect to mutuality but not to private speculation”, whilst the Civil Code defines cooperatives as “organisations with variable capital and mutual aims” (whereby mutual aims are those concerning reciprocal benefit between an enterprise and its members).

The setting up of a cooperative means starting an enterprise in a cooperative manner, which means an activity is chosen and the objectives are established, so that a form of working contract is agreed upon. It is then necessary to decide whether the cooperative should be predominantly mutual (with a no profit clause) or not.

A cooperative must then be publicly registered and underwritten with a constitutional act and statute. The constitutional act must outline a chosen administrative system, which can be traditional (Board of Directors & Board of Auditors), dualistic (Management Board & Supervisory Board) or monastic (Board of Directors & Internal Supervisory Board). Other elements defined in the constitutional act must be that of the social objective, social capital, the admission and withdrawal of members, the distribution of income and of dividends, the calling of meetings, etc.

At a local level, the “development of cooperation and the supervision of cooperatives” was recognised when the region of Trentino Alto Adige was declared autonomous in 1948 giving legal power to the local authorities, covering three areas:

- Registration of cooperatives, along with a constant supervision of their registered status;
- Frequent checks and revisions of the cooperatives;
- Actions and measures implemented in the event of irregular behaviour in the management of cooperatives, with the possibility of closing the activity.

Between 1988 and 1993, legislation at a regional and then provincial level helped develop some sectors of the economy, and also provided financial resources to help promote the culture and values of cooperatives. Of special importance in this time was a law passed by the

Region of Trentino Alto Adige in 1988 for the no profit sector of social cooperation, which preceded the national law (Law 381 of 8th November 1991). Later in 1993, Regional Law 15 recognised two forms of social cooperatives: cooperatives working in health, culture and education management; and cooperatives working in various fields such as that of agriculture, industry and services relating to the employment of disadvantaged persons.

### **1.3 Describe briefly the present situation of the cooperative system in each country and the role of cooperatives in the national/regional economy.**

The total area covered by the Province of Trento is about 6200 km<sup>2</sup>, which is 2% of the national territory. The local population stands at about 500,000 inhabitants.

An important characteristic of the local economy is the strong presence of the cooperative movement, which employs 12,000 permanent workers and 18,000 suppliers in 507 cooperatives.

Other fact that demonstrates the importance of cooperatives in this area is the number of cooperative members, which is today 170,000 (out of 220,000 registrations as people can be members of more than one cooperative). This number is even more important when considering that 94,451 out of the 500,000 population are not old enough to vote!

Cooperation is also the leader in two very important sectors of the local economy: the credit sector and the agricultural sector. Cooperatives in fact represent 80% of the total agricultural activities, while the credit sector holds 66% of total deposits and 55% of total loans in the province of Trento ( with 47 Mutual Banks and the Casse Rurali manage 376 branches).

The retail sector is also important in the cooperative economy with:

- 80 *Famiglie Cooperative* – cooperatives;
- 353 shops (38% of local market share);
- 81,692 members;
- 2,216 employees.

An important point to note is that the *Famiglia Cooperativa* is the only shop in 195 villages!

There are also many other cooperatives that cover a range of activities such as craftsmanship, carpentry, catering, hygiene, software, transport, advertising, housing, environment, renewable energy, etc. which make up:

- 301 cooperatives;
- 22,059 members;
- 6,372 employees;
- € 555m total income.

The local cooperative system is organised in three non hierarchical layers:

- 1st level coops (about 170,000 people) who are the physical members;
- consortiums whose members are the cooperatives;
- the Federazione Trentina della Cooperazione that is a body to represent and supervise the four cooperative sectors and the two previous levels. In the Trentino cooperative system is not considered the 3rd level. Its members can be both cooperatives and consortiums.

The cooperative know-how developed and matured in Trentino over the years means that the local socio-economic background can be preserved and maintained, in order to help the enterprises survive not only in their local context but also in a global market, while respecting both a social need and an economic perspective.

## 2 The learning structure in the cooperative system of the participant countries/regions

### 2.1 Describe briefly the learning structure (skills developed; availability of formal; non formal and informal learning; obligatory and non-obligatory training; training organisations involved; costs and possible funds for training, statistics (figures and kinds of co-operators involved), methodologies, possible use of ICTs, etc).

Three are the pillars of the lifelong learning in the Trentino cooperative system:

- 1 The **co-operative movement** according to its co-operative statute – the co-operative movement is represented by the Trentino Federation of Cooperation (FTC). FTC developed various activities in order to train ‘good and aware cooperators’ according to the ICA (International Cooperative Alliance) principle of education, training and information: “co-operatives are committed to the development of their members, representatives and staff in order to make the co-operative effective. They inform the public and young people of the benefits of co-operation”.
- 2 **Schools** – primary and secondary schools which include in their programme cooperative education actions aimed to promote and strengthen the social awareness for young people. Generally, in each academic year, approx. 100 schools, 10.000 pupils and 1.000 teachers are involved in cooperative education activities (quantitative figures in Trentino: 400 schools, 62.000 pupils and 7.000 teachers). This education actions are identified as a preliminary training for the future ‘good and aware co-operator’. Many times, in fact, these actions are developed with the constitution of a real cooperative (with all the official documentation and roles) amongst the pupils: These are then recognised as the first experiences as members/cooperators as first cooperative identity developing process;
- 3 **Public institutions** – the Region and the Province promote co-operative education and training approving specific laws which guarantee financial support for the realization of projects aimed to increase collaboration and exchange between the co-operative movement and schools, the promotion of the cooperative movement at different levels.

Other important learning opportunities (formal, non-formal and informal) are offered by the same cooperatives that involve their members in different actions like technical-professional training courses for improving the professional skills; various non-official events (meetings, coop tours, etc) dedicated to the members for promoting and improving the cooperative identity; official events (for example the annual board assemblies) for presenting, managing and discussing the cooperatives.

The cooperator associations are also important actors for the learning. For example, the Association Women in Cooperation (Associazione Donne in Cooperazione) offers interesting training opportunities in the field of management in a gender viewpoint; Association of Young Cooperators (Associazione Giovani Cooperatori) organises study visits and training courses.

The University of Trento is also active with courses dedicated to the cooperative movement.

Till now there have not been made a complete map of the learning opportunities in the Trentino cooperative system. Different sectors, actors and levels are involved in formal, non-formal and informal learning actions.

Before summarising them, it is necessary to give the definitions of reference for these kinds of learning, starting from the ones identified by “The EC (2001) Communication on Lifelong Learning: formal, non-formal and informal learning”, i.e.:

- **“Formal learning**: learning typically provided by an education or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner’s perspective.

- **Non-formal learning:** learning that is not provided by an education or training institution and typically does not lead to certification. It is, however, structured (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner's perspective.
- **Informal learning:** learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional but in most cases it is non-intentional (or "incidental"/ random) (p32-33)."

So, it is possible to contextualise these definitions in:

- **Formal learning** (that will be not objective of this project) is characterised by having "a prescribed learning framework, an organised learning event or package, the presence of a designated teacher or trainer, the award of a qualification or credit, the external specification of outcomes". The easier example is the school and university education, specific vocational training courses with a certification;
- **Non-formal learning** is proposed by institutions that are not usually/typically recognised as training ones, has not the objective to gain a certificate/qualification but has shared learning objectives and items very similar to the formal one as an organised learning event or package. Many times they mix formal and informal learning items and methods. Examples are here courses and activities developed in order to develop awareness, no-mandatory courses and events;
- **Informal learning** does not take place in special training environment but in life/work places as learning by doing new practices without pedagogic, conscious and structured activities and without Examples are here a spontaneous meetings, a phone call to someone who has information you need, the sharing of the work practices and solutions amongst colleagues, seminars and informal events.

An important sector of the education and training for the Trentino cooperative system is represented by the activities developed mainly by the Cooperative Education Office with the local schools. These activities are not directly related to the learning opportunities for the 'good and aware cooperator' but offers interesting basis and premises for their training. In fact, they represent the first experience of cooperative identity for the children that will be the future cooperators. These activities are:

- non-formal learning activities of teacher training - by way of seminars, courses and workshops;
- formal learning events like lessons at schools – by way of specific training modules according to the age of the pupils, the level of schools, the interest of the teachers involved, etc;
- non-formal events like competitions and exhibitions at schools - organized in order to motivate involvement within co-operative projects e.g. in the fields of environment, nutrition, savings and co-operative entrepreneurship education;
- non-formal events that promote information and advice for schools – such as the organisation of Coop days, in particular for High Schools and Universities with the preparation of stands for the cooperative enterprises to present their activities and explain the many profiles within the "cooperative profession".

Other activities are organised by FTC for promoting the cooperative identity and for training people in the cooperatives. In terms of learning opportunities, they are:

- study visits (for teachers, students, international delegations, etc) and work placements in co-operative enterprises – aimed to acquire new skills and to experiment work in the co-operative sector; [non formal opportunities]

- production and elaboration of didactic materials – constantly planned and updated according to teachers/trainers and students'/learners' needs that are then used in formal and non-formal learning activities [informal learning developed in the process of the didactic materials construction];
- meetings and seminars for the cooperators aimed to present the Statement of values of the Trentino cooperative movement completed in 2007 [non-formal opportunities];
- open seminars/ discussion on the cooperative theme with the intervention of different authors [non-formal opportunities];
- participation in international project in different fields and also in the research of methodology for the promotion of the cooperative education and training [informal opportunities].

The formal learning related to the cooperative activities are mainly carried out by the *Formazione & Lavoro* (Training & work Agency), a society which generally provide technical/vocational training for all the cooperative sectors as well as for the Association of young cooperators and for the Association of women in Cooperation according to their needs and requests.

In addition the University has an important role in the cooperative education. In fact the FTC has an agreement with the University of Trento which allow both to include in the education programme of the Economy and Law Faculties modules concerning the cooperative enterprises and to implement master degree courses on the cooperative theme.

In Trentino, a structured and articulate training programme focused on the promotion and strengthening of the cooperative identity or the active membership does not exist. In the recent year the cooperators request for this kind of training are significantly increasing.

In addition, the cooperatives themselves develop non-formal and formal learning actions for their own members organizing formal courses necessary for the development of specific technical skills related to the cooperative mission, informative meetings or activities as for example trips aimed to strength the membership or to visit other cooperative systems.

Specific formal and non-formal learning actions are planned by the cooperatives that choose to have special cooperator. The special cooperator is a sort of member foreseen by the Civil code which has to be trained in order to gained cooperative membership knowledge. So, the cooperatives organise formal internal learning actions in order to respect this role and train the members.

The non-formal learning are represented by the opportunities summarised above.

Probably the most important informal learning should be consider the long tradition (110 years) in the cooperative field in Trentino transferred from a generation to another. Actually, the cooperative experience is an important part of economic and social life of Trentino interlocked with its culture, tradition and history. The province of Trento, with a total population of about 490,000 inhabitants counts 210,000 cooperative member.

FTC supports the cooperatives with professional experts that work with them on especially on technical issues (for example accounting and compiling the balance sheet). The presence and the work with these experts offer informal learning opportunities.

Furthermore, the life and work in the cooperative actively participating to its activities is the other important opportunity of informal learning. The structure, statute and way of work of the cooperatives are developed according to the cooperative principles and values. So, they are one of the most important environments for the informal learning.

## 2.2 Give a definition of the learning target in the cooperative system (role in the cooperative, kind of cooperative, background, skills requested, skills needed, age, gender, etc).

Within the Italian legal framework there are different types of cooperators recognised in order to attempt to define the different roles and responsibilities:

- *Soci cooperatori* (ordinary members) - are those who sign a *social contract* and become both joint owner and user of the services/ purchaser of the goods of that same enterprise. There is a mutual interest which is that of offering the goods or services at better conditions than those available on the market. Such is obtained with shared possession of the enterprise among the ordinary members, i.e. of *shares* worth not less than 25€ and not more than 500€. Each member has one vote (except for special cases when the vote must not exceed 5), which is the right to participate in a mutual organisation.
- *Soci speciali or "in prova"* (special members) – are those who would like to be members but would benefit from a trial period in which they can experiment what it actually means to be a member. These trial members cannot be more than a third of the total number of members and the period must not exceed 5years.
- *Soci finanziatori* (financing members) - when cooperatives choose to apply the same conditions as that of an SpA (which is a public limited company), they are able to make use of financial instruments such as that of shares which contribute towards the social capital of the cooperative, and it is those who own the shares who are defined as *financing cooperators* who cannot have more than one third of the voting power.
- *Soci sovventori (funding members)* – are similar to the previous definition. However, it is a more specific definition that refers to sectors such as that of building or technology where specific investment may be required by such sponsors, who are able to vote (not exceeding 5) according to their funding interest, but cannot have more than one third of the total voting power.
- *Possessori di azioni di partecipazione cooperativa (shareholders)* – are similar to the previous definition (special cases chosen for long term investment plans) but cannot take part in a mutual exchange.
- *Soci volontari (voluntary members)* - are those who offer their services as members free of charge (especially for social cooperatives). They cannot represent more than half of the total number of members. There is no earning foreseen for such members, only reimbursement for expenses incurred.

The cooperators can have different roles according to the type of the cooperative as follows:

- worker cooperator –typical to work and services cooperatives
- client cooperator – typical in the credit cooperatives
- customer cooperator - typical in the consumer cooperatives
- management cooperators – in all the cooperatives

There are not available figures yet that quantify the percentage of women or young cooperators of total number of members. Studies in progress will try to point out these details. One of the main difficulties is that often people are members of more then one cooperatives.

## 3 The skills for the ‘good and aware co-operator’

### 3.1 Describe the activities that are usually requested to the co-operators in your country/region

The general activities that interest all the cooperators beyond the characteristic of the different sectors are:

1. **Paying the capital share**
2. **Voting** – Active participation: the co-operators have the right and the duty of participating to the general assembly of their cooperatives. In the general assembly they vote the directors of board, decide about the responsibilities directors of board, endorse the annual financial statements, approve the changes of the statute.
3. **Managing** - The co-operators elected directors of board represent all the cooperators and have the responsibility of manage the cooperatives in order to achieve the cooperative purpose. The activities requested to the law are 4 :
  1. to convene the general assembly
  2. to prepare and present the annual financial and social statement
  3. to write the internal regulations that has to be approved by the general assembly
  4. decide about new co-operators admission or their exclusion.
4. **Controlling** - The cooperators has the responsibility to control the behaviour, the decisions and the actions of the directors of board and of the cooperative in general.
5. **Working**
6. **Benefiting from products / services** - the co-operators have to be loyal to their cooperatives, using their products and services.
7. **Supplying**
8. **Training**

**3.2 Complete the following table, indicating the cooperator activities (example: as member has to participate in the annual assembly of the board) and the related skills gained and to be gained (add lines if necessary)**

As previously mentioned, the cooperative system in Trentino is divided into four different sectors according to field, mission and structure, namely: the credit sector; the retail sector; the agricultural sector; and the remaining which can be summarised as labour, social, service and housing cooperatives.

We carried out a series of informal interviews with representatives from each sector in order to understand the specific skills required, and to understand what training actually exists and therefore what aspects are missing. This is necessary to define what is needed for a ‘good and aware cooperator’.

Each specific sector obviously requires specific skills for the cooperators working within them, which is often catered for with specific training courses: whether it is administration or banking for the credit sector; environmental awareness for a social or retail cooperative; updating on scientific procedures in agriculture, etc.

An important aspect that frequently emerges as lacking today is a strong understanding of what being a cooperative and therefore a cooperator actually means: the awareness and recognition of principles and values. These values are present in everyday life, and are also part of cooperative statutes, but as intangible aspects they are often forgotten. That specific training is carried out is evident in all sectors, but a common weakness that emerged was that of a shared objective or mission that creates a competitive advantage to help survive in the global market today. The need to strengthen identity, especially of the small and medium size enterprises, is becoming more apparent in today’s rapidly changing society. The original thinking behind the idea of a cooperative system, driven by poverty and the need to survive, is no longer applicable. The changes in generations means that the history of cooperation remains in the past, so that the current generations are unaware of the original needs and reasons for cooperating. This means that while all the sectors are receiving specific training on subjects inherent to their activity, they remain distant from the original ideology and driving

force of the system. These are aspects which can be both simple in their nature but also difficult to raise as they are integral part of the people and the moments in history. It would be however important to work on these areas in order to strengthen the identity of the cooperatives and so to enhance their meaning, providing a competitive advantage to not only survive on a global market but also to prosper. A 'good and aware cooperator' can therefore benefit from training in areas specific to their work, and also training about principles and values that guide the cooperative movement, and positively promotes them. An important item to note in Italy is that training is not mandatory for members. The following table shows the specific results from the interviews.

Activity	Skill	Skills							
		Gained <sup>1</sup>				To be gained - To be improved			
		C	A	Co	V	C	A	Co	V
<b>Paying the capital share</b>	Knowledge of the cooperative system	X	X	X	X	X	X	X	X
<b>Voting – Active participation</b>	Team working				X				
	Knowledge of the cooperative system					X	X	X	X
	Gathering information					X		X	X
<b>Managing</b>	Technical skills in management	X*	X*	X*		X*	X*	X*	
	Mutualistic ethic skills				X	X	X	X	
<b>Controlling</b>	Knowledge of rights	X	X		X	X	X	X	X
	Ability in exercising one's rights					X	X	X	X
<b>Working</b>	Specific technical skills			X	X				
<b>Benefiting from products / services</b>	Knowledge of products / services	X	X		X				
	Benefiting correctly from products / services		X		X	X		X	
	Mutualistic ethic skills			X	X	X	X	X	
	Knowledge of own responsibilities		X			X		X	X
<b>Supplying</b>	Specific technical skills		X		X		X		
	Mutualistic ethic skills		X		X		X		
<b>Training</b>	Learning skills typical for each sector	X	X	X	X				
<b>Representing local community**</b>	Knowledge of local community and its needs				X	X		X	X
<b>Promoting new and initiatives**</b>	Innovative spirit					X		X	
	Knowledge of the cooperative system					X		X	

\*\* The technical skills in management is requested only for the managing members.

\*\* These activities and related skills emerged by the work with the person responsible for the credit cooperatives

<sup>1</sup> C: Credit cooperatives  
A: Agriculture cooperatives  
Co: Consumer cooperatives  
V: Various cooperatives (Working, services, social and housing cooperatives)

**3.3 Indicate which skills are necessary for the training of a ‘good and aware co-operator’ and where it is necessary introduce other skills in the proposed grid (add new lines if necessary)**

Skills	Is it important for your cooperators?				Are there learning opportunities?*			
	C	A	Co	V	C	A	Co	V
<b>Personal skills</b>								
Will to compromise	X	X			N	N		
Flexibility								
Sense of responsibility	X	X	X	X	N	N	N	N
Empathy								
Entrepreneurship		X	X			IL	IL	
Spirit of innovation	X	X	X		N	N		
Social competence/skills				X				IL
Creativity								
Risk assumption			X				N	
Availability	X	X			N	N		
Ethic motivation	X		X	X	N		N	N
<b>Ethic skills</b>								
Democratic conduct, skills and values	X	X			N	N		
Cooperative identity		X				N		
Mutualistic ethics		X	X	X		N	N	NFL IF
Awareness of cooperative principles and values	X				N			
Mission agreement and fidelity			X					
Working for other people				X				FL IF
Motivation				X				IF
Accepting the diversity	X			X	N			IF
Gender awareness	X			X	N			IF
<b>Transversal skills</b>								
Problem solving ability								
Have a sensitive ear, a good listener				X				N
Group processes: diplomacy – Team working								
Capacity of finding cooperative solutions	X		X		N		N	
Leadership → Cooperative management		X	X			N	NFL N	
Communication skills		X	X			N	N	
Project management (Management skills for the cooperative success)		X				N		
Objective gaining	X				N			
Decision making in cooperation								
Cooperative networking	X	X		X	N	N		N
Negotiation								
<b>Technical skills</b>								
ICT skills								
Specific professional skills according to the activities of the cooperatives		X		X		FL, NFL IL		FL, NFL IL
Familiarity with legal aspects of the cooperatives		X	X			NFL, IL	N	
Forming a business		X				N		
Writing a business plan		X				N		
Marketing knowledge and research								
Pricing, product or service			X				N	
Insurance								
Admin and bookkeeping skills	X		X		NFL		NFL, N	
Knowledge of funds and legal supports for the		X				N		
Knowledge of the market and cooperative system	X	X			N	N		

\* FL – Formal Learning, NFL – Non-formal Learning, IL – Informal Learning, N – No learning opportunities

The answer to this question is a preliminary work that will be completed in the work package PREP2 - Identification of informal and non formal learning processes.

## II. PARTNER: ABPSHE

### D.1.2. BALANCE SKILLS

#### 1 The cooperative system in the participant countries/regions

##### 1.1 Describe briefly the legal form (for the cooperatives) in each country – conditions and requirements to start and manage a cooperative.

The cooperatives in Turkey are ruled by the Cooperatives Law 1163 of April 24, 1969. Cooperatives are defined as the bodies with variable members, variable capital, and legal identity that are established by natural and public legal entities and private administrations, municipalities, villages, societies and associations in order to ensure and maintain certain economic interests and especially the needs of their members toward professional life and living standards by means of mutual assistance, solidarity and service as trustees to each other.

By this law two forms of cooperatives are recognised (1).Cooperatives working in agriculture (2).Cooperatives working in various sectors such as industry, health, culture and services. In the frame work of their aims; establishment, işleyiş and auditing of the cooperatives are in the responsibilities of 'Ministry of Industry and Trade' and 'Ministry of Agriculture and Rural Affairs'.

A cooperative is established through an Rules to be signed between 7 members. The establishment is registered with the local Trade Registry Office and announced accordingly after the permission of the Ministry of Industry and Trade.

**General Assembly:** Entire members of the cooperatives are represented by the General Assembly with maximum authority.

**Board of Directors:** The executive organ of the cooperatives, managing the activities of the cooperatives within the provision of the Law and the Rules, as well as representing the cooperative.

**Auditors:** The auditors inspect the entire transactions and accounts of the cooperative for and on behalf of the General Assembly.

Cooperative associations, Central Associations of Cooperatives and the Turkish National Cooperatives Association are established for the purpose of realizing the services such as the protection of the joint benefits of the cooperatives, the realization of economic activities for achieving objectives, coordinating and auditing the activities of the cooperatives, organization of the relations with foreign countries, development of the cooperative-business and the realization of training activities and recommendations on the cooperative-business.

##### 1.2 Describe briefly the present situation of the cooperative system in each country and the role of cooperatives in the national/regional economy.

Cooperative enterprises are mostly in the west part of Turkey especially in Istanbul, Ankara and Izmir.

There are 26 various approx. 88.752 cooperatives with 8.492.345 members regulated and authorized under the control of Ministry of Agriculture and Rural Affairs and Ministry of Industry and Trade.

Cooperative systems divided into two different sectors according to field namely: (1).Cooperatives working in agriculture (2).Cooperatives working in various sectors. According to statistics app. 12.000 of all cooperatives are agricultural and the remaining is from the

sectors such as retail, credit, labour, social, service and housing. Construction Cooperatives are the leaders with 60.092 members mean the 68% of all cooperatives.

Data's of the last 5 years shows that each year app. 2100 cooperatives (1000 Housing Construction, 250 Motorized Transporters, 50 Workplace Construction, 500 Agricultural Development and 40 Irrigation) were established. Although there is a high increase in the number of cooperatives only 10%of the country population participated to the cooperatives.

There are no official records about the share of cooperatives in the GNP in Turkey. Besides, there is not any scientific research which is accomplished on the basis of how much impact the cooperatives' job placement and value creation, and the income distribution have.

## **2 The learning structure in the cooperative system of the participant countries/regions**

### **2.1 Describe briefly the learning structure (skills developed; availability of formal; non formal and informal learning; obligatory and non-obligatory training; training organisations involved;, costs and possible funds for training, statistics (figures and kinds of co-operators involved), methodologies, possible use of ICTs, etc).**

#### **COOPERATORS and COOPERATOR ASSOCIATIONS**

Cooperators are the first responsible actor to offering learning opportunities (formal, non-formal and/or informal) to their managers, members and workers to improve their personal, ethical, transversal and technical skills. Annual National Conferences, Workshops are the preferable non-formal learning opportunities offered by the cooperators to their members. Printed and electronic materials are the tools used to reach the community.

The realization of training activities, in order to gain 'Good and Aware Cooperators' according to the ICA principle of education, training and information, is one of the purposes of the establishment of Cooperative associations, Central Associations of Cooperatives and the Turkish National Cooperatives Association. In this framework for example Turkish National Association organizes the '19th International Turkish Cooperative Congress', October 9-12, 2008, Ankara. Its theme is "The Need for Change and Transformation in Cooperatives". Several topics (Cooperatives and Human Resources, Cooperatives and Innovation, New Strategies in Cooperatives, Financial Reporting and Financial Management in Cooperatives) in these fields will be discussed during the congress. The ultimate goal is to contribute challenges that cooperatives faces.

#### **School and university education**

In the curriculum of Commercial Vocational High Schools the obligatory course 'Introduction to Cooperatives' is given as a preliminary training for young people. Those pupils are encouraged to do their obligatory internships in cooperatives of different sectors.

Each year approx. 375 students graduate from 'Cooperative Programs' of professional schools in 6 various universities. After their 2 year education students get associate degree.

There are master degree programs in the social sciences institutes of the universities for the ones who want to be professional in management of cooperatives.

Research and Applied Center of Cooperatives' was established by the Gazi University in 2006 in Ankara. The center is for making researches and offers short term learning opportunities (formal learning) for the cooperators managers, members, workers, university students and the ones who want to work in cooperators.

Istanbul Aydin University has an agreement with Istanbul Union of Craftsman and Artisans Chamber. They agree on organization of the training programs to improve the personal, transversal and technical skills of the members.

**2.2 Give a definition of the learning target in the cooperative system (role in the cooperative, kind of cooperative, background, skills requested, skills needed, age, gender, etc).**

Learning Program	Learning Targets	Kind of Cooperative	Gender
Self Governance	a) Social and interpersonal skills; b) Accountability, responsibility, and transparency; c) Communication skills, and language; d) Listening and interpreting; and e) Diplomacy, conflict resolution, and consensus building	ALL	ALL
Management	a) Regulations, bylaws, and building codes; b) Maintenance, repairs, and construction; c) Staff liaisons; and d) member selection, education, and support.	ALL	ALL
Leadership	a) Managerial and organizational skills; b) Mentoring; c) Coordination and treatment of volunteers	ALL	ALL
Democratic Attitudes and Values	a) Cooperative principles, values and philosophy; b) Concern for the common good c) Multiculturalism, respect for diversity and openness; d) An increased interest in international issues.	ALL	ALL
Political Efficacy	a) Self-esteem and self-confidence; b) Contacts with politicians and elected representatives; c) Political interest and knowledge; d) Civic and political engagement.	ALL	ALL
Competencies	a) Finances and budgeting; b) Office management and clerical skills; c) Document writing and newsletter production; d) Computer skills; f) Research skills.	ALL	ALL

**3 The skills for the ‘good and aware co-operator’**

**3.1 7.1 Describe the activities that are usually requested to the co-operators in your country/region.**

General activities requested from the Co-operators are

1. Managing
2. Auditing
3. Financial Contribution
4. Training
5. Knowledge Sharing
6. cooperating within the Co-operators
7. having social responsibility

3.2 Complete the following table, indicating the cooperator activities (eg: as member has to participate in the annual assembly of the board) and the related skills gained and to be gained (add lines if necessary).

Activity	Skill	Skills						
		Gained				To be gained		
		Man	Me	W		Man	Me	W
1. Managing	Technical Skills in management	X	X			X		
	Being Democratic in Management	X	X	X		X	X	X
	Being Voluntary and Open membership	X	X			X	X	
	Gathering Independence	X	X	X		X	X	X
2. Auditing	Stakeholders' rights	X				X		
	Aware of personal responsibilities	X	X	X		X	X	X
	Rules and roles	X	X	X		X	X	X
	Internal and external auditing	X	X			X	X	
3. Training	Learning technical skills in sectoral bases	X	X	X		X	X	X
	Specific professional skills	X	X	X		X	X	X
	Personal development	X	X	X		X	X	X
4. Knowledge Sharing	Gathering information	X	X	X		X	X	X
	To create values	X	X	X		X	X	X
5. Cooperating within the Co-operatives	Team and group working		X			X	X	X
	Promoting and distributing new ideas	X	X			X	X	X
	Service quality enhancement	X	X	X		X	X	X

3.3 Indicate which skills are necessary for the training of a 'good and aware co-operator' and where it is necessary introduce other skills in the proposed grid (add new lines if necessary):

Skills	Is it important for your cooperators?	Are there learning opportunities?*
<b>Personal skills</b>		
Will to compromise	YES	NFL,IL
Flexibility	YES	IL
Sense of responsibility	YES	NFL, IL
Have a sensitive ear, a good listener	YES	NFL, IL
Entrepreneurship/spirit of innovation	YES	FL, NFL, IL
Social competence/skills	YES	NFL, IL
Creativity	YES	N
Other:		
<b>Ethic skills</b>		
Democratic conduct, skills and values	YES	NFL, IL
Group processes: diplomacy – Team working	YES	NFL, IL
Cooperative identity	YES	FL, IL
Other:		
<b>Transversal skills</b>		
Problem solving ability	YES	NFL, IL
Empathy	YES	NFL, IL
Capacity of finding cooperative solutions	YES	NFL,IL
Leadership	YES	FL, NFL,IL
Linguistic ability	YES	FL, NFL,IL
Project management	YES	FL, NFL, IL
Other:		

<b>Technical skills</b>		
ICT skills	YES	FL, NFL, IL
Specific professional skills according to the activities of the cooperatives	YES	FL, NFL, IL
Familiarity with legal aspects of the cooperatives	YES	NFL, IL
Forming a business	YES	NFL, IL
Writing a business plan	YES	NFL, IL
Marketing knowledge and research	YES	FL, NFL, IL
Pricing, product or service	YES	NFL, IL
Insurance	YES	FL, NFL
Negotiation	YES	FL, NFL
Admin and bookkeeping skills	YES	FL, NFL, IL
Other:		

- \* **NFL – Non-formal Learning**
- IL – Informal Learning**
- N – No learning opportunities**
- FL – Formal Learning**

## II. PARTNER: LANKI

### D.1.2. BALANCE SKILLS

#### 1 The cooperative system in the participant countries/regions

##### 1.1 Describe briefly the legal form (for the cooperatives) in each country – conditions and requirements to start and manage a cooperative.

The cooperatives in the Basque country are ruled by the Cooperatives Law of the Basque Country from the 24th of June of 1993 (decentralized scheme, and therefore, an autonomic law). According to it a Cooperative is an enterprise and a society of persons, composed at least by three members, with a minimum capital of 3.000 €, and driven by the principle one member one vote.

Type of members recognised by law: worker members (contribute with capital and labour), collaborator members (don't contribute with labour but with capital), inactive members (members who want to keep the relationship with the cooperative after finished their active membership period), temporary members (same rights and duties that permanent ones, with a maximum period of five years after which they become full members or dismissed) and consumers members.

Representative boards: The General Assembly (obligatory), it is ruled by one member one vote principle in cooperatives of first grade. The Executive board (obligatory) could be colegiated or not. Board of Directors (obligatory), Vigilance Board (obligatory for cooperatives with more than 100 members), Social Council (facultative for cooperatives with more than 50 members).

Public support: Tax benefits in relation to the Corporation tax (impuesto de sociedades). In return cooperatives must provide The Obligatory Reserves Fund and the Fund for Cooperative Promotion and Education with part of the benefits.

Other public policies oriented to cooperatives: In general the public financial support doesn't have a finalist view; they are specific policies for cooperatives societies. Public subsidies for promotion and enterprising, incorporation of new members, financial participation of employees, training and education on cooperatives and social economy, etc.

Describe briefly the present situation of the cooperative system in each country and the role of cooperatives in the national/regional economy.

In the Basque Country the cooperative movement is centred on Mondragon cooperative movement. Mondragon groups more than a hundred cooperatives and participated enterprises, many of which operate in the industrial sector and generate a high added value. At the end of 2007, Mondragon employed more than 100.000 people and concentrated around the 8% of the GDP of the Basque Country.

From a business point of view, the Mondragon's activities are divided into three areas - Financial, Industrial and Distribution- which function independently within a global strategy coordinated by the Corporate Centre. The Financial Area includes activities such as banking, social welfare and insurance. The Industrial Area comprises 12 Divisions dedicated to the production of goods and services. The Distribution Area is made up of various commercial distribution and agricultural-food enterprises. There are also a number of Research, Vocational Training and Teaching centres, including a University which has more than 6,000 students. In fact, LANKI, the Institute for Cooperative Studies, belongs to the University.

Mondragon represents a strongly structured movement capable to adapt to the changing market economy conditions. However, the transformations that the cooperative movement is currently experiencing reflect certain crisis of meaning. This phenomenon goes together with a weak transmission of the cooperative culture; the cooperative identity and values have gone behind the socio-economic changes. In this context, some structural tendencies could be pointed out: a remarkable deceleration in the creation of new cooperatives, the increase of the percentage of temporary workers and non-members, the opening of the salary interval, the business expansion process in non cooperative format, and in certain cases, the cooling-down of democratic participation. So, briefly, these may be some of the key points around which the cooperative movement itself is reflecting on.

At the same time, a new area socio-economic activity is attracting more clearly the attention of the cooperative movement: the provision of social and care services, especially for dependant people (as a consequence of the new regulation that recently came in force). Although in other European countries the social cooperatives are quite developed, this is not our case, and between the private public spheres, the cooperatives indeed don't want to loose the opportunity to present themselves as service providers.

## **2 The learning structure in the cooperative system of the participant countries/regions**

### **2.1 Describe briefly the learning structure (skills developed; availability of formal; non formal and informal learning; obligatory and non-obligatory training; training organisations involved; costs and possible funds for training, statistics (figures and kinds of co-operators involved), methodologies, possible use of ICTs, etc).**

In a wide sense, the learning opportunities offered within the Mondragon cooperative movement are incountable. Up to date, there have not been made a complete map of learning opportunities, including formal, non formal and informal activities. In the following lines, we will try to summarize the different activites carried out; underlying the type of cooperative lifelong learning programmes in which LANKI is especially interested.

#### **OFFER ON FORMAL, INFORMAL AND NON-FORMAL LEARNING:** The same cooperatives:

**FORMAL:** They involve their members in different actions like technical-professional training courses for improving the professional skills (based on the right of the cooperator for training as it is foreseen in the cooperative law).

**INFORMAL:** The long tradition in the cooperative field transferred from a generation to another. The day to day experience working in the cooperative and actively participating to its activities is the other important point for informal learning.

**NON FORMAL:** courses, seminars and workshops in specific areas, both in technical and socio-institutional skill improving. Information and advice services on accounting, compiling balance sheet or legal matters.

**The Educative structure within the Mondragon cooperative movement.** There are two basic actors for cooperative training: Otalora and Lanki. The first one depends directly on Mondragon group (Social Management area) and Lanki comes from the Mondragon University. The offers of learning opportunities are enlisted in the following table. Although all the courses don't lead to a certification, following the way they are designed we could consider them as formal learning activities.

The following training programmes focus on the promotion and strengthening of the cooperative identity and values. These programmes aim to reinforce the active membership of cooperators.

Learning programme	Structure	Actors involved	Training Organization involved	Duration	Methodology
Cooperative Training Programme for Representative Boards	Non-Formal	Representative Boards	OTALORA and LANKI	16 hours	Participative model (workshop)
Master Degree Programme on Cooperative Training	Formal and non-obligatory. Leads to a certificate.	Social leaders and members of Representative Boards, future cooperative trainers and students	OTALORA and LANKI	235 hours	Participative and dialogic mode. Seminars and workshops
Academic Degree in "Humanities and Enterprise". Subjects with cooperative contents*: - Enterprise culture and cooperativism: - Introduction to enterprise: - History of thought: - Labour and Tax Law:	Formal and obligatory. Leads to a certificate.	University students	LANKI	10 hours aprox. per each subject	Seminars
Bazkide Programme	Non-formal and not obligatory	New members	OTALORA	16 hours aprox.	Semi-plenary sessions
Several programmes for specific figures and with specific targets	Non-Formal and not obligatory	Representative Boards	OTALORA and Others.		

\* Status: stand-by. At the present moment, the continuity of this degree is on discussion.

Besides, there is a new cooperative training programme for all members, which is officially approved by Mondragon's cooperatives, but it doesn't start running yet. In fact, its design isn't defined whether it will have formal, informal or non-formal approach, or a combination of them.

LEARNING MATERIALS: Production and elaboration of learning materials used in formal and non-formal learning activities by Otalora, Lanki (papers, guides, books, one periodical publication and especially, didactic materials, including DVDs and powerpoint presentations) and the same cooperatives (annual reports, guides, books).

## 2.2 Give a definition of the learning target in the cooperative system (role in the cooperative, kind of cooperative, background, skills requested, skills needed, age, gender, etc).

Learning Programme	Learning targets	Kind of cooperative	Age	Gender
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Learning programme for Representative Boards	-Provide knowledge in depth in Mondragon's Cooperatives -Reflection on social meaning of cooperation -Detect points of improvements	All	None	None
Master Degree Programme on Cooperative training	-Provide knowledge in depth about Mondragon's cooperatives -Provide a socio-ethic view of social reality -Develop skills on socio-institutional management -Develop skills on cooperative training -Offer a relational view on cooperation	All	None	None
Academic Degree in "Humanities and Enterprise". Subjects with cooperative contents: - Enterprise culture and cooperativism: - Introduction to enterprise: - History of thought: - Labour and Tax Law:	-Introduce the cooperative culture, thought and practice (including the normative frames) into the academic programmes. -Facilitate the students' professional careers in the cooperative sector.	None	None	None
Bazkide Programme	-Support the incorporation and integration of the new members to the cooperative -Reduce the adaptation period -Give practical information about the cooperative model -Knowledge of duties and rights	All	None	None
Several programmes for specific figures and with specific targets	Give practical and theoretical basic knowledge on functions of the Representative Boards	All	None	None

### 3 The skills for the 'good and aware co-operator'

#### 3.1 Describe the activities that are usually requested to the co-operators in your country/region.

The member participation is double, it falls on the socio-structure (governance of the cooperative as organization), as well as on the tecno-structure (the management of the enterprise). So, it means that the activities that are requested to the co-operators may be classified in two groups. Firstly, those activities related to the democratic ruling of the organization.

And secondly, those activities related to the job in the cooperative. In this sense, few months ago Mondragon approved a new management model whose most innovative element is that it is based on the cooperative principles of the Cooperative movement. Obviously, the work force is very heterogeneous, as well as the skills required for the jobs within the same cooperative and even more among different cooperatives depending on their business. So, the management model is a sort of a common platform that must be developed by each cooperative depending on their business and work force organization.

**3.2 Complete the following table, indicating the cooperator activities (eg: as member has to participate in the annual assembly of the board) and the related skills gained and to be gained (add lines if necessary).**

Activity		Actors	Skills		
			Skill	Gained	To be gained or improved
<b>Participation and social controlling</b>	Participate in the Annual Assembly of the Board	All	Will to compromise, Sense of responsibility	Yes	Yes
	Nominate the Members of the Executive Body and the Social Council	All	Sense of responsibility, cooperative identity	Yes	No
	Formulate proposals	All	Knowledge of the cooperative system, creativity, sense of responsibility	Some	Some
	Be informed about the daily running of the cooperative	All	A good listener, flexibility, feel motivated	Yes	Yes
<b>Participation, representation and managing</b>	Be nominated and elected as member of the Executive Board	Candidates for the Executive Board	Sense of responsibility, democratic conduct, cooperative identity, leadership, negotiation, sensitive ear	Yes	No
	Give information about the daily running of the cooperative	Executive Board members/ Members of the Board of Directors	Empathy, linguistic ability, cooperative identity, social competences, flexibility, feel motivated	Yes	Yes
	Attend and represent properly the cooperators in the Executive Board		(besides the skills enlisted in box 3) specific professional skills, familiarity with legal aspect of the cooperatives, capacity of finding	Yes	Yes
	Proper management of the company as members the Board of Directors		Sense of responsibility, group process, cooperative identity, leadership, negotiation and other technical skills.	Yes	Yes
	To lead cooperative culture and values among the cooperators*		Cooperative identity, feel motivated, social competences, leadership	Yes	Yes

<b>Participation, representation and social controlling</b>	Be nominated and elected as member of the Social Council	Candidates for the Social Council	Sense of responsibility, democratic conduct, cooperative identity, group process, sensitive ear,	Yes	No
	Attend and represent properly the cooperators in the Social Council	Social Council members	(besides the skills enlisted in box 3), empathy, leadership, and	Yes	Yes
	Give information about the daily running of the cooperative		Empathy, linguistic ability, cooperative identity, social competences, flexibility, feel motivated	Yes	Yes
	Participate in the Social Council		Will to compromise, cooperative identity, leadership,	Yes	Yes
	To lead cooperative culture and values among the cooperators*		Cooperative identity, feel motivated, social competences, leadership	Yes	Yes

\* During the last years, the training effort has been especially focused in this activity area.

**3.3 Indicate which skills are necessary for the training of a ‘good and aware co-operator’ and where it is necessary introduce other skills in the proposed grid (add new lines if necessary):**

Skills	Is it important for members of Representative board? OTALORA LEARNING PROGRAMME	Are there learning opportunities? *
<b>Personal skills</b>		
Will to compromise	Yes	FL
Flexibility	Yes	FL
Sense of responsibility	Yes	FL
Have a sensitive ear, a good listener	Yes	NFL
Entrepreneurship/spirit of innovation	Yes (especially, the second one)	
Social competence/skills	Yes	
Creativity	Yes	
Other: feel motivated	Yes	FL
Ethic skills		
Democratic conduct, skills and values	Yes	FL
Group processes: diplomacy – Team working	Yes	IL
Cooperative identity	Yes	FL
Other:		
<b>Transversal skills</b>		
Problem solving ability	Yes	
Empathy	Yes	
Capacity of finding cooperative solutions	Yes	FL
Leadership	Yes	IL
Linguistic ability	Yes	
Project management	Yes	
Other:		

<b>Technical skills</b>		
ICT skills	Yes	
Specific professional skills according to the activities of the cooperatives	Yes	
Familiarity with legal aspects of the cooperatives)	Yes	
Forming a business		
Writing a businessplan		
Marketing knowledge and research		
Pricing, product or service		
Insurance		
Negotiation	Yes	
Admin and bookkeeping skills	Yes	
Other:		

\* NFL – Non-formal Learning, IL – Informal Learning, FL – Formal Learning

<b>Skills</b>	<b>Is it important for members of Representative board? POSGRADUATE IN COOPERATIVISM</b>	<b>Are there learning opportunities? *</b>
<b>Personal skills</b>		
Will to compromise	Yes	FL
Flexibility	Yes	IL
Sense of responsibility	Yes	FL
Have a sensitive ear, a good listener	Yes	IL
Entrepreneurship/spirit of innovation		FL
Social competence/skills	Yes	FL
Creativity	Yes	IL
Other: feel motivated	Yes	FL
Ethic skills		
Democratic conduct, skills and values	Yes	FL
Group processes: diplomacy – Team working	Yes	FL
Cooperative identity	Yes	FL
Other:		
<b>Transversal skills</b>		
Problem solving ability	Yes	FL
Empathy	Yes	IL
Capacity of finding cooperative solutions	Yes	FL
Leadership	Yes	IL
Linguistic ability	Yes	
Project management		
Other: Communication skills	Yes	FL
<b>Technical skills</b>		
ICT skills	Yes	
Specific professional skills according to the activities of the cooperatives	Yes	
Familiarity with legal aspects of the cooperatives)	Yes	
Forming a business		
Writing a businessplan		
Marketing knowledge and research		
Pricing, product or service		
Insurance		
Negotiation	Yes	
Admin and bookkeeping skills		

Other:		
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- \* NFL – Non-formal Learning
- IL – Informal Learning
- N – No learning opportunities
- FL – Formal Learning

## II. PARTNER: LANKI

### D.1.2. BALANCE SKILLS

#### 1 The cooperative system in the participant countries/regions

##### 1.1 Describe briefly the legal form (for the cooperatives) in each country – conditions and requirements to start and manage a cooperative.

The cooperatives in Sweden are ruled by the cooperatives law, The Cooperative Societies Act passed on 11 June 1987.

The object of a co-operative society is to promote the economic interests of its members by means of economic activities in which the members participate as consumers or other users, as suppliers, by contributing labour, by making use of the society's services, or in some other similar way.

In order to form an economic association there has to be at least three people, physical or juridica and a minimum capital of 1 SEK. There must be a board, and rules in accordance with the law as well as an elected accountant. This form of enterprise has a condition of openness, which means that it is only possible to set up “natural” restrictions as to which members are invited. These restrictions may not be arbitrary and must have an acceptable reason clearly set out in the rules. The law is following the international cooperative principles, which says that the membership in a cooperative should be voluntary and open. It's possible to put up some restrictions concerning the membership but then the restrictions must have an acceptable reason, for example the membership criteria is to be a farmer in a certain geographical area. The acceptable reason in this case can be the fact that members should not have too far to transport their products to the dairy. An unacceptable reason is, for example, that those who originally set up the co-operative are only allowed membership. The association has to be registered with the Swedish Patent and Registration Office.

Economic associations do not get any tax benefits compared to other forms of enterprise. Nor do they get preferential treatment in, for example, public procurements. In completely open consumer co-operative associations it is possible to avoid paying tax on the distributed surplus. In the legal sense, the board carry no personal liability. This form of enterprise is common in a social economy when the activities are to be run by users or employees.

Once a society has been registered, it may acquire rights and assume liabilities as well as bring actions before a court and other official bodies.

##### 1.2 Describe briefly the present situation of the cooperative system in each country and the role of cooperatives in the national/regional economy.

Sweden has enjoyed high growth in recent years. If this growth is to be sustainable in the long term, Swedish business policy needs to face up to a number of important challenges:

- We need more new enterprises. The proportion of entrepreneurs in Sweden is low in comparison with other EU member states.
- We need more growing enterprises. Too few enterprises are growing in size and contributing to increased growth and employment.
- We need more strong regions. Many Swedish regions have a low rate of growth compared with the rest of Europe.

The growth of the cooperative enterprises is increasing more than other forms of enterprises in Sweden – from the years 1977-2006 (counted in numbers of cooperatives) the increase has been 44%. At the same period the increase of the private company was 17%.

The cooperative enterprises are increasing in the majority of branches with strongest rate of growth in the sectors of manufacturing, energy supplies, services and education.

The current situation in Sweden is that we see a big demand for cooperative solutions – more than 72% of young adults who wants' to start a company can see the benefits of working together and are willing to choose the cooperative as their legal form of company.

The vision for the cooperative movement in Sweden is a long-term sustainable society characterized by the values of the cooperative movement: self-help, self-responsibility, democracy, equality, equity and solidarity and where the co-operative enterprises play an opinion leading role.

## 2 The learning structure of the non-formal system in Sweden

*Folkbildning = liberal adult education; non-formal and voluntary*  
Folkbildning's philosophy presumes that all citizens are free and independent individuals, with the right to participate in all aspects of a democratic society. The activities should provide a comprehensive approach, stimulate curiosity and critical thinking; as well as be a part of the crucial process of lifelong learning. Folkbildning creates the conditions necessary for people to freely pursue knowledge and contributes towards giving them the opportunity to change their lives. Folkbildning in Sweden is organised through Study Associations (Studieförbund) and Folk High Schools (Folkhögskola).

The first **Folk High Schools** in Sweden were established in 1868 and today there are 148 schools in the country. Despite being separate, Folk High Schools are now a popular, important and established part of the Swedish education system. 105 of the schools are run by various popular movements, organisations and associations (NGO's), whilst the remaining 43 are run by county councils or regions. A characteristic feature of the Swedish Folk High Schools is, among other things, their freedom to develop the content and direction of their own courses. This means that they diverge from ordinary schools in many ways. There is no centrally established, standard curriculum for the Folk High Schools, each school makes its own decisions regarding teaching plans within the limits set by a special ordinance. Each year about 27 000 students take part in the long courses. The Folk High Schools receive financial support from the state. A certain interest has been directed towards groups with special educational needs, e.g. people with short basic education, people with various disabilities and immigrants and the unemployed. The minimum age for admission to the general courses is 18 years. There is no upper age limit.

The history of **study circles** is old; the first study circle was started within the temperance movement in 1902. This was soon followed by similar study circles in many other organizations in Sweden. Study circles became a significant tool for the education of members in political organizations and the voluntary sector in their efforts to become a resource to develop Swedish democracy. The study circle offered possibilities for adults to acquire new skills and practice the art of debating.

Sweden now has approximately ten non formal adult study associations, which organize study circles and cultural events in cooperation with their member organizations and also for the general public. Although the study circle is basically the same now as earlier it has, through its flexible and dynamic form, evolved to meet the needs and values of modern society and adult education using new technology. Educational study associations have received financial support for their operations from the Swedish government, regional and local government councils over a long period of time.

The study circle consists usually of between 7 and 12 participants.

One member is the study circle leader, trained for the assignment.

Meets continuously, once or twice a week, over an extended period.

The duration of a meeting is usually not more than 3 hours.

Utilises study material, which often consists of books and texts but may also be other media.

Follows a plan, often produced in advance, but sometimes developed by the study circle.

Invites “experts” and other outsiders to contribute their knowledge.

**Lärcentrum** – Learningcenters – are a relatively new service for adults (from 19 years). Aprox. 2/3 of the municipalities in Sweden can offer the service that the Learningcenters provides and it’s almost always financed by the public service. The service they provide at Lärcenter is e.g educational guidance, study offering and, in many cases, implementation of studies for adults . Learningcenter offer education to Municipality Adult Education, Folk High Schools, study circles and private education accomodators. Throughout their network, the Learningcenters can provide a wide range of education alternatives both to content, level (of education) and form.

Target: Education is a tool for personal developement and it is also, as a factor of groth, important to the region. Therefore it’s important that education is easy access regardless of level of education, home district, age, genus or present occupation.

### 3 The learning structure in the cooperative system of the participant countries/regions

#### 3.1 Describe briefly the learning structure (skills developed; availability of formal; non formal and informal learning; obligatory and non-obligatory training; training organisations involved;, costs and possible funds for training, statistics (figures and kinds of co-operators involved), methodologies, possible use of ICTs, etc).

Learning programme	Structure	Actors involved	Training organization involved	Duration	Methodology
Knowledge of the different rolls within the representative boards	Non formal	Representative boards and members	Educational study associations	From 9 to 25 hours	study circle
Social economy and social enterprising	Formal and obligatory	University students with cooperative interest	High school and university	6 month – part time (50%)	Seminars and workshops, ICT
- Enterprise culture and cooperativism: - Introduction to enterprise: labour and tax law	Non formal	Students and others with cooperative interest	Folk High school and study organization, Coompanion	1 year	Full time studies
Culture entrepreneurs	Informal and not obligatory	folk high school students	Folk High school and Coompanion	1 year	Full time studies
Introduction to enterprise: Enterprise culture and cooperativism	Informal and not obligatory	Representative boards and members	Folk High school, Study organization and Coompanion	From 9 hours	Study circle, seminars, workshops and part time studies
Tax law	Informal and not obligatory	All	Swedish national tax board	From 2 hours	Information meetings , ICT
Labour law	Informal and not obligatory	Representative boards and members	the Employer’s Organization KFO (organizing cooperative entities)	From ½ day	Seminars, workshops

Social enterprising	Informal and not obligatory	Representative boards and mentors	Companion	From ½ day	Seminars and workshops
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### 3.2 Give a definition of the learning target in the cooperative system (role in the cooperative, kind of cooperative, background, skills requested, skills needed, age, gender, etc).

The main target for the Skills project is to make cooperators more aware and active.

Learning Programme	Learning targets	Kind of cooperative	Skills requested	Skills needed	Age	Gender
Education for members of representative boards	Give practical and theoretical basic knowledge on functions of the representative boards	All			None	All
Introduction to enterprise: Labour and tax law, marketing	Learn about cooperative culture, thought and values. Basics; How to run an enterprise	All			None	All
Social enterprising	Education for mentors within social enterprises	Social cooperatives	Yes	Yes		
The social economic programme	General information about the social economy, to benefit the public and members' interests through democratically organised non-profit activities	All	Yes			
International cooperation	International perspectives and promoting international cooperation	All				
Culture entrepreneurs	Possibilities which cooperation in the fields of music, dance, theatre, handicrafts and art. Promote and preservation the local culture and developing international relations. Enterprise culture and cooperativism.	Culture cooperatives				
Employers	Salary negotiation, employment and pension agreements, vacation law holiday compensation, working environment law, medical insurance, public procurement	All – es. members of representative boards		Yes		All

## 4 The skills for the 'good and aware co-operator'

### 4.1 Describe the activities that are usually requested to the co-operators in your country/region.

Knowledge of starting a cooperative, networking, marketing, meeting technique, book keeping, social enterprising, laws and rules, contracts and agreements, business development

4.2 Complete the following table, indicating the co-operator activities (eg: as member has to participate in the annual assembly of the board) and the related skills gained and to be gained (add lines if necessary).

Activity	Skills		
	Skill	Gained	To be gained
Annual assembly	Meeting technique and knowledge		
Networking	Have a sensitive ear, a good listener, entrepreneurship/spirit of innovation, social competence/skills, creativity		
Business development	Marketing knowledge and research, Pricing, product or service		
Book keeping	Admin and bookkeeping skills		
Starting a cooperative	Familiarity with legal aspects, law etc		
Admin, bookkeeping	Knowledge of bookkeeping		
Contracts and agreements	Basic knowledge		
Marketing	Entrepreneurship/spirit of innovation, Capacity of finding cooperative solutions, networking capacity, creativity		
Networking	Entrepreneurship/spirit of innovation, Capacity of finding cooperative solutions, networking capacity, creativity, good listener, democratic conduct etc		

4.3 Indicate which skills are necessary for the training of a 'good and aware co-operator' and where it is necessary introduce other skills in the proposed grid (add new lines if necessary):

Skills	Is it important for your cooperators?	Are there learning opportunities? *
<b>Personal skills</b>		
Will to compromise	yes	IL, NFL
Flexibility	yes	IL, NFL
Sense of responsibility	yes	IL, NFL
Have a sensitive ear, a good listener	yes	IL, NFL
Entrepreneurship/spirit of innovation	yes	IL, NFL
Social competence/skills	yes	IL, NFL
Creativity	yes	IL, NFL
Other:		
<b>Ethic skills</b>		
Democratic conduct, skills and values	yes	IL, NFL
Group processes: diplomacy – Team working	yes	IL, NFL
Cooperative identity	yes	FL, IL, NFL
Other:		
<b>Transversal skills</b>		
Problem solving ability	yes	IL, NFL
Empathy	yes	IL, NFL
Capacity of finding cooperative solutions	yes	IL, NFL
Leadership	yes	FL, IL, NFL
Linguistic ability	yes	FL, IL, NFL
Project management	yes	FL, NFL
Other:		

<b>Technical skills</b>		
ICT skills	yes	FL
Specific professional skills according to the activities of the cooperatives	yes	FL, NFL, IL
Familiarity with legal aspects of the cooperatives	yes	FL, NFL
Forming a company	yes	FL
Writing a business plan	Yes/no	FL
Marketing knowledge and research	yes	FL
Pricing, product or service	yes	FL
Insurance knowledge	yes	FL
Negotiation skills	yes	FL, NFL, IL
Admin and bookkeeping skills	Yes/no	FL, NFL
Other:		

\* NFL – Non-formal Learning  
 IL – Informal Learning  
 FL – Formal Learning