Building Co-operative Education at Different Steps of the Co-operative Journey: Lessons from Chile

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Throughout the world, different countries have had different levels of co-operative entrepreneurship and importance of co-operatives in their economy. Increasingly, we see that those countries where co-operatives have smaller support ecosystems belong to the Global South. This article focuses on the work of Mapocho, an organisation in Chile concerned with developing the co-operative economy through a dual strategy of: (1) informal and formal education for young people and entrepreneurs outside of the co-operative movement and (2) the development, training, and support of existing co-operative and associative businesses and enterprises. I present the 'funnel framework' through which the dual strategy is born and the theory of change from which it was created. As a conclusion, the article proposes lessons and reflections around the framework, as well as recommendations for how to implement co-operative education and development in the Global South.

Introduction

Encouraging the creation and strengthening of co-operatives has proved to be a difficult task, especially in countries of the Global South. In this task, co-operative education has an essential role to play, both in its formal and its informal iterations. In this article, we use a broad definition of co-operative education, meaning learning about co-operatives, in co-operatives, or for co-operatives, regardless of the pedagogical methods, techniques, or institutions involved. This article looks into the efforts of Mapocho, a co-operative development organisation in Chile. First, I provide some context on the Chilean co-operative movement and Mapocho. Then, the 'funnel framework' is presented, together with a summary of how it was developed, based on a systemic theory of change. Lastly, I draw several lessons and make some recommendations for how to build a stronger co-operative sector both in Chile and abroad.

This article also contributes to the growing literature on co-operative education. Others have argued that co-operative education does not have to be centred around formal educational institutions, and that co-operatives themselves are places of learning (Macias & Ruiz, 2018; Perez-Ruiz & Shaw, 2019). At the same time, the funnel framework proposes several initiatives in line with helping individual co-operators "participate in and shape a global social movement"

(Noble & Ross, 2021). The need to use co-operative education as a wide concept, with both formal and informal variants, is addressed throughout this article, being one of the important recommendations stemming from this experience.

Context

The Chilean co-operative movement

In relative terms, Chile does not have a very developed co-operative context relative to countries in the region and with similar income levels (Mogrovejo et al., 2012). Whilst other Latin American countries have well established and relatively large co-operative economies, Chile's sector is still relatively small compared to the Global North. The 2014 global census on co-operatives offers a useful illustration of the scale of the relative importance of co-operatives in different regions. While in Europe co-operatives represent around 7.08% of the GDP, in Latin America they account for only 0.33% (Dave Grace & Associates, 2014). Chile also suffers from an undynamic co-operative ecosystem with no public institutional organ directly in charge of promoting co-operative development compared to other countries in the region (Correa, 2022). Even though there are positive signs of a growing ecosystem, only 0.5% of the population is a member of a co-operative, compared to Argentina (41%), Ecuador (46%), and Uruguay (37%). Co-operative workers account for only 0.2% of the national workforce in Chile (Correa, 2022).

Blame for this perhaps lies in the Pinochet dictatorship (1973–1990), whose neoliberal policies attacked co-operatives from both economic and social perspectives (Radrigán Rubio, 2022). Since then, there has been a transformation process in the co-operative movement, with two different currents appearing: one which prioritised their economic success with a pragmatic stance towards new market conditions, and another which maintained a more political view of the co-operative movement, pushing for democratisation of the economy, both during the dictatorship and afterwards (Pérez Arocas et al., 2003).

In summary, Chile has faced a lot of obstacles to create a larger and more impactful social economy. The question of how to overcome them is the central topic of this article and more concrete strategies and recommendations are made in the conclusion.

Mapocho

Mapocho is currently focused on boosting social transformations mobilising people to collaborate (https://fundacionmapocho.cl/). In practice, its work is mostly focused on promoting and developing co-operative businesses in Chile, alongside working in several areas of the broader Social and Solidary Economy. Originally, Mapocho was formed as an NGO that focused on storytelling for change and impact communication (Duarte, 2010; Hattaway, 2019). After some success in event production, running TEDx talks for example, Mapocho was contracted by the government to produce E3COOP, the three Es standing for Encuentro de Economía Social y Solidaria (Social Economy and Entrepreneurship Encounter). E3COOP is an initiative with the goal of promoting co-operatives as a model of social entrepreneurship for young people.

This objective was created by diagnosing two necessities. Firstly, the need to create more co-operatives in Chile, due to their proven positive social and economic outcomes. For example: co-operatives are more resilient and give more stable jobs (Núñez-Nickel & Moyano-Fuentes, 2004; Perótin, 2016); they build social fabric in local communities (Sabatini et al., 2014) and social capital (United Nations [UN], 2003); help to reach a wide range of SDGs (Moxom et al., 2019; Wanyama, 2015); and help with several other social and labour challenges (Díaz Foncea & Marcuello, 2013; Wanyama, 2014; Yi et al., 2019). Secondly, there is the need to revitalise the co-operative movement, allowing more young people to join it. This is in line with the stated goals of the broader international co-operative movement, and is of value because it is evident that young people can have negative views of co-operatives such as seeing them as outdated (International Cooperative Alliance [ICA], 2020; Moxom et al., 2021).

The first E3COOP event in 2016 used a TEDx format, where different co-operators gave talks showcasing their positive impacts and looking to inspire young people to consider co-operatives as a strong social entrepreneurship option. This tactic made sense as co-operatives and social entrepreneurships are proven creators of formal jobs for young people (United Nations, 2020) and they align with the values of the youth (Ochoa & López, 2019). At the same time, several studies have argued in favour of classifying co-operatives as social innovations (Altamirano Analuisa et al., 2019; Morales Gutiérrez, 2012), social businesses (Luzarraga Monasterio et al., 2010) and as part of the broader social entrepreneurship world (Moxom et al., 2021, Ochoa & López, 2019; Radrigán & Barria, 2006).

Creating the Funnel Strategy

Mapocho underwent strategic planning in the first trimester of 2021, revisiting what was initially thought out for E3COOP, in light not only of several years of experience, but also new perspectives from international trends. These sessions included planning for the long term, including a review of strategic objectives and an action plan to reach them. They included the move toward platform co-operatives (Scholz, 2016), influenced by the increasingly common occurrence of co-operative incubators and accelerators internationally, such as Start.coop (USA), UnFound (UK), and Incubacoop (Uruguay). These demonstrate that co-operatives could see a new surge in popularity and have considerable impact using technology and start-up methods. From this process, two key strategies for the organisation's efforts emerged:

> Continuing with E3COOP's approach, using communication and storytelling to inspire more people to become co-operative member-owners and entrepreneurs.

> Developing a more hands-on approach where Mapocho would participate in incubating and developing actual co-operative ventures.

The main difference between both lies in the target population of the possible initiatives. While the hands-on approach targets co-operative ventures in the ideation or developing phase, the former targets a more general population in an effort to create awareness of the co-operative's sector impact.

The theory of change

To understand where to allocate efforts to maximise impact, the organisation proceeded to create a clear theory of change, which drew on NESTA's DIY Toolkit (https://www.nesta.org.uk/toolkit/diy-toolkit/). Mapocho doubled down in the diagnosis that gave birth to E3COOP, redefining it by asking why young people are not attracted to co-operatives and why was the creation rate of new co-operatives in Chile deficient. Because of Mapocho's previous involvement in the social innovation ecosystem, like E3COOP, we decided to focus on Social Entrepreneurship. We saw that our problem could be divided into three points. Firstly, co-operatives are not seen as a valid alternative to social entrepreneurship. Secondly, there is no successful innovative co-operative in Chile that could be used as a benchmark of what we wanted to create. Thirdly, co-operatives have a reputation of being antiquated and not fit for the needs of the modern world. After defining the problem, the long-term goals of the project were as follows: increasing the rate of new co-operative ventures; establishing at least ten co-operatives in ten years; and finally, positioning co-operatives as a viable form of social entrepreneurship.

The theory of change posed an interesting question; how do we accomplish our ambitious long-term goals, considering the systemic problems diagnosed? The answer was to find different ways in which Mapocho could support the development of co-operatives across a wide range of target populations and levels of involvement. Therefore, the steps necessary to achieve change (see Table 1, column 4), had to resemble a broad strategy to create successful benchmark co-operatives, finding tactics to use every step of the way. In other words, a list of projects and initiatives were needed that could convert one person from being practically uninformed of co-operatives, into a successful leader and founder of a co-operative business.

Table 1: Original Theory of Change

What is the problem you are trying to solve?	Who is your key audience?	What is your entry point to reaching your key audience?	What steps are needed to bring about change?	What is the measurable effect of your work?	What are the wider benefits of your work?	What is the long-term change you see as your goal?
Co-operatives have a stigma of being antiquated and not fit for the needs of the modern world	Social leaders, grassroots organisers and communities	Higher education institutions with business schools	1. Convincing them that co-operativism is cool	Positive perception of the co-operative movement	To know a fairer development alternative	Increasing the rate of new co-operative ventures
There is no successful innovative co-operative that could be used as a benchmark of what we wanted to create in Chile	People with both an entrepreneurial spirit and social concerns	Municipalities and social programmes	2. Create awareness of the positive impact generated by co-operatives	Measurable knowledge of the co-operative sector	Acquire more tools for co-operative development	Positioning at least 10 co-operatives in 10 years
Co-operatives are not seen as a valid alternative to social entrepreneurship	Co-operatives with the potential to be publicised as successful and innovative	NGOs that do field work	3. Help them to get a co-operative project off the ground	Number of co-operatives created	Access to a better source of employment	Positioning co-operativism as a viable form of social entrepreneurship.
		Businesses with impact in the communities	4. Develop and improve existing co-operatives	Number of co-operatives still active after one year	Improve material, social and economic conditions of involved people	
			5. Develop and improve the skills of individual leaders in co-operatives	Co-operatives being highly positioned in the general entrepreneurship ecosystem	Improve co-operatives capacity for impact	
			6. Position successful benchmark co-operatives at a national level			
Key Assumptions						
The current image of co-operativism doesn't allow growth	The target audience wants to be a member or founder of a co-operative	Co-operativism is something these institutions care about	That this step by step actually works in a lineal manner	That co-operativism allows better working conditions	That positioning co-operatives actually helps generate impact	Co-operatives will help build a better world
						There are enough people that want to be a co-operative founder
						Positioning co-operativism as a whole will help the model grow

The funnel framework

The theory of change Mapocho used can be conceptualised as a funnel, where each step has a progressively smaller key audience or target population. In the first step, the audience is society in general, as the target population has still not entered the co-operative journey and the main objective is just to convince them that co-operatives are 'cool'. The notion of 'cool' might seem vague, however it was a word that generated common understanding between all participants.

The next two steps in the funnel strategy relate to co-operatives in the ideation and developing phase of an entrepreneurial journey. Meanwhile, the last two steps in the funnel respond to developing and improving the skills of individual leaders in co-operatives and positioning successful 'benchmark co-operatives' at a national level. These steps require a more hands-on approach.

Table 2: Steps and target population of the funnel

Step	Target Population
1. Convincing it that co-operatives are *cool*	Society in general
2. Create awareness of the positive impact generated by co-operatives	People with interest in co-operatives
3. Help them to get a co-operative project off the ground	People with interest in starting a new co-operative venture
4. Develop and improve existing co-operatives	Member-owners and worker-owners of co-operatives
5. Develop and improve the skills of individual leaders in co-operatives	Leaders and founders of co-operatives
6. Position successful benchmark co-operatives at a national level	Successful benchmark co-operatives

The funnel proposes a clear segmented strategy where co-operative support organisations like Mapocho can work towards their goals comprehensively. These steps helped brainstorm examples of projects and initiatives that could be used to advance the social mission of the organisation (see Table 3). Funding these projects and the financial viability of such organisations was then analysed using a 'social business canvas', which can also be found in NESTA's toolkit.

Table 3: Selected initiatives and projects

Step	Initiatives and Projects
1	• Create an attractive landing page for E3COOP with information about co-operatives. • Promote the social media accounts of E3COOP and create more content. • Offer workshops and talks in schools and universities, inviting young people to learn about co-operatives.
2	• A weekly newsletter with news about the co-operative movement in Chile and the world, highlighting innovative practices. • More E3COOP events. • Community building around speakers and audiences of past E3COOP events.
3	• Workshops for co-operatives in the ideation phase (governance and business model design). • Consultancies for strategic businesses that want to build associative practices around their stakeholders — something already being negotiated. • Develop a methodology that can map out how to help build better co-operatives. • *Spread the word* workshops to convince and support potential communities of emerging co-operatives.
4	• Consultancies on grant applications and on obtaining funding. • Create and publish a toolkit for co-operative entrepreneurship. • Workshops around marketing, pricing and construction of organisational narrative. • Bespoke consultancies and advising.
5	• Training possible co-operative mentors and building a consolidated network. • Connecting advanced co-operative leaders with appropriate mentors.
6	• Traditional media positioning campaigns.

The funnel framework tackles the development of co-operatives in a broad manner, looking to strengthen the movement as a whole and responding to the ambitious goals that were proposed at the start of the strategic plan. With this, both strategies that were discussed in Mapocho were integrated into an action framework.

On one hand, people start the journey in the first step of the funnel, where we propose to use communication and community-building to inspire people to join the co-operative movement, similar to what E3COOP proposed. At the same time, further steps in the framework propose a hands-on approach to developing co-operative initiatives and turning existing businesses into success stories. The focus on co-operative education is laid out in the initiatives that Mapocho proposes (see Table 3). Co-operative education here is treated as a wide concept, and due to the diverse target populations, a variety of teaching and training methods should be used, and programmes should be designed with a human and user-centred focus (Lambropoulos, 2007; Linton & Klinton, 2019; Maziku et al., 2019; Val et al., 2017). To build a stronger co-operative movement it is necessary to learn about co-operatives inside and outside the movement, while also training co-operators in business and organisational practices.

With this, the question of where to focus efforts was solved by looking at the framework as a dialectic process where help is needed at every step of the way. Mapocho decided to focus efforts where opportunities to receive remunerated work appeared.

Putting the Strategy to Work

The strategic planning that we developed using this strategy loosely guided the work of Mapocho during 2021 and 2022, turning the framework more into guiding principles of Mapocho's work, rather than a strict timetable or roadmap. A certain degree of flexibility was needed, as Mapocho does not have a guaranteed income, and it must rely on pitching and adapting these initiatives for private funding interests and to comply with public grants. For example, many of Mapocho's activities were contingent either on the use of internal funds, pitching successfully to private supporters, or leaving sufficient labour resources to accept offers made by previous clients, even if they did not adhere strictly to the original framework. There was also strong reliance upon the funding of larger key strategic partners that had a hand in influencing the directions and guidelines the organisation had to adhere to.

It is also important to note that originally the funnel framework was meant to be executed by a new organisation or brand that would be incubated in Mapocho's legal entity. This was originally planned as a spin-off called *Futuro Cooperativo*, that would concentrate on advancing all the work Mapocho was already doing in the Social and Solidarity Economy sector. By mid-2021, this idea was scrapped entirely and the whole framework was incorporated in Mapocho's work. Ultimately, these strategic decisions were not taken with full consultation and agreement of the whole team that planned and executed the project, further hindering the adherence to the original framework.

Despite these limitations, the work of Mapocho did act upon the initiatives that were originally planned. Even though it would be wise to develop a formal impact evaluation of the framework, this article limits itself to reflecting upon the last three years of work. To give some context, it is important to highlight noteworthy successes that stemmed from the proposed theory of change:

> A full methodology (Bertranou & Schiaffino, 2022) where the path of the co-operative entrepreneur is mapped, was designed and built from a systematic investigation and co-creation process. This methodology currently consists of a comprehensive step-by-step strategy for co-operatives to follow proposed learning objectives. This provides a way to approach education for co-operatives in different stages of development. The methodology is accompanied with a toolkit that helps complete the proposed learning objectives for one of the initial steps. (Fundación Coopeuch, 2023)

> A public grant was awarded by CORFO, a state institution which has as one of their purposes creating conditions for dynamic entrepreneurship in the country. Working together with a wide array of actors from the co-operative movement, the grant was designed to create a co-operative ecosystem in southern Chile, specifically the regions of Los Lagos and Los Ríos. This grant was awarded to Cooperativas del Sur in 2022, a business association of the largest co-operatives operating in the south of the country, in association with Mapocho. To the best of the author's knowledge, it is the first time that such a large-scale entrepreneurship and innovation grant is awarded to the cooperative sector in Chile. The project was carried out in December 2023.

Mapocho helped position Sermecoop, a health services co-operative in Chile. During 2021, Mapocho worked with the co-operative to rethink their organisational narrative and in 2022, to strengthen their co-operative identity. Sermecoop, has now joined ICA, built several international contacts, and is actively pursuing a positioning strategy through seminars and other activities.

In what follows, specific conclusions and recommendations are discussed.

Conclusions

Main lessons around the funnel framework

After two years of implementing initiatives around a comprehensive theory of change, there are several lessons concerning the work that Mapocho implemented, and also reflections around the initial theory of change:

The funnel framework is a large-scale strategy that cannot be handled by one individual organisation. An organisation is better suited to specialise in one or two steps of the funnel, providing key services. This is especially true for co-operative education, in the sense that the initial steps of the funnel could benefit from organisations specialised in general education and later steps could benefit from organisations that are more focused on governance or business model development. This is expanded in the next section.

Co-operatives are not startups, and they should follow their own path of development. There was an unrealistic initial assumption that co-operatives were able to replicate the growth trajectories of start-ups and newer social enterprises, focusing on founders and individuals. This is expanded upon in the methodology created by Mapocho with Fundación Coopeuch (Bertranou & Schiaffino, 2022).

Chile is a developing country where co-operatives are different to those in the Global North. This is a specially interesting lesson, considering that most of the original inspirations of Mapocho's funnel framework came out of countries with higher income levels and different socio-economic contexts. Indeed, it appears that the broader platform co-operative movement has also learned this lesson, intensifying its work in the Global South.

It is not proven that developing and positioning one successful benchmark co-operative, will inspire more people to join the co-operative movement. The initial framework relied heavily on this biased assumption due to the proximity of the team with storytelling and narrative.

It is necessary to be in tune and work with the younger and newer co-operative movement. Mapocho originally worked closely with established co-operatives belonging to one of the two big umbrella co-operative organisations in Chile, *Cooperativas de Chile*, a business association of large co-operatives that have fared well under current market conditions and are perceived as less in tune with the political and transformational expectations of the broader co-operative movement in Chile. Mapocho has had little contact and projects with TRASOL, a relatively new federation of worker co-operatives that is characterised by young professional members and a stronger political stance rooted in transformative and revolutionary politics. The lack of affinity of this federation with the proposed framework is especially troubling. It might also be explained by other prejudices in play, such as the fact that Mapocho is not a co-operative and competes in services with business development co-operatives that are part of the Federation.

Expanding the scope of the strategy

This article offers a contribution to the conversations at national and international levels regarding how to build structures to teach about, assist, and develop co-operative businesses. The author believes that it would be especially useful to use the funnel framework as a starting point to plan at a national level, hopefully in a longer co-construction process involving all actors and creating medium-term goals over a four to eight year timespan. Several recommendations are given here which can also be extrapolated to other contexts:

It is necessary to have an institutional actor that will co-ordinate this effort, including both the national government, local governments, the co-operative sector, and other relevant private initiatives. This actor can be state-led; however, it should function independently from whichever

political party is in power. This should stop the current way of working, where uncoordinated actors compete for the limited available resources. As of 2024, the Chilean government has completed the first steps to create such an institution establishing a special committee with both public and private actors inside the state development agency, CORFO.

This institutional actor should have a fixed budget that will allow the strategy to develop for several years. Mapocho did not follow its own framework because of the organisation's need to fund itself, depending on contracts and private consultancies to survive.

Co-operative education must be a central part of the strategy, working with a wide array of actors that can reach a diverse audience. For co-operatives to flourish, it is necessary to work both with people that do not know about them and people that are heavily involved in the movement. At the same time, it is important to help people get involved with, start, or develop an efficient co-operative business. For this, traditional (public schools, private universities, business schools, etc.) and specialised educational institutions (co-operative schools and universities, technical co-operative colleges) that can reach different types of audiences have a role to play. At the same time, specific co-operative support organisations must frame their work developing co-operative businesses as an educational one.

It is necessary to have a unified co-operative movement, or at least opening the space for all perspectives to be accepted into this strategy. There are understandable differences between co-operative umbrella organisations which pursue different ideological and political objectives, however, they are all unified by the guiding values and principles of co-operatives (ICA, 2015) and the broader Social and Solidarity Economy. This author believes that the co-operative sector is too small in Chile, and it should focus on jointly creating one overarching strategy where all perspectives can grow and co-exist, instead of three isolated ecosystems.

It is necessary to treat the strategy as a public policy, evaluating its impact and allowing modifications. This will help with the legitimacy of creating a long-term nationwide strategy with several initiatives. Serious impact evaluations can also help highlight flaws in initial assumptions.

Chile needs a better legal framework for co-operatives. Even though there was a recent modification of the general law on co-operatives, there are still several problems that prevent the agile creation of new co-operative ventures.

To conclude, by focusing on the funnel framework, this article has explored how to grow the co-operative economy in Chile by developing a dual strategy. The first part of the strategy is informal and formal education for young people and entrepreneurs outside of the co-operative movement. The second part focuses on the development, training, and support of existing co-operative and associative businesses and enterprises. The proposed lessons and reflections are intended to stimulate co-operative education and development in the Global South.

The Author

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