

ANNEX A: Summary Report to Sonja Novkovic on IDRC Sponsored Project:

Fostering the Development of the Cuban Social Economy:
Responsible Enterprises, Cooperatives and Local Development

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INTRODUCTION

The purpose of this document is to report out on the results of the project Fostering the Development of the Cuban Social Economy: Responsible Enterprises, Cooperatives and Local Development. This project was undertaken during the period April 2012 to March 2013 through support provided by International Development Research Council and Saint Mary's University, who share a focus of preserving and advancing Cuba's achievements in the levels of human development - an important goal also for the Cuban government.

BACKGROUND

In March 2011, the Cuban government announced policy measures (Los Lineamientos) intended to increase the role of worker cooperatives as an engine of growth in Cuba's socialist economy. A workshop in Havana in December 2011¹ brought together cooperators from Canada, Cuba, the United States and Scotland to discuss how the global cooperative community could assist Cuba as it moves in this direction. This project one of the outcomes of that workshop.

PURPOSE:

The purpose of this project was to further the knowledge base of our Cuban colleagues as they move forward in their plans to build a cooperative, socialist economy.

¹ [Walking the Walk: Cuba's path to a more cooperative and sustainable economy](#). December 12-16, 2011. Havana, Cuba.

TERMS OF REFERENCE

Our objective was to connect Cuba's academics, policy-makers and practitioners with existing learning opportunities focused on best practice in the social economy sector and with a special sub-focus on the cooperative sector.

Our terms of reference called for facilitated learning exchanges to deepen Cuba's understanding of the potential for social economy enterprise to assist in achieving development goals by:

1. providing opportunities for Cuban officials to witness and better understand the panoply of cooperative options available in Canada and worldwide;
2. further exposing Cuban officials to multiple forms of social enterprise;
3. deepening Canadian knowledge and understanding of the economic changes in Cuba; and
4. deepening Saint Mary's University's linkages with social economy organization and government officials in Latin America, and Cuba in particular. Cuba is at the crossroads on its way to transform its economy to a predominately co-operative form.

METHODOLOGY

A Project Team was formed with hands-on expertise in projects related to sustainable development, social economy, corporate social responsibility and co-operative firms, social enterprise and co-operative education and practical and education experience in self-management and co-operatives in socialist economies, such as Cuba's.

Three exchanges were organized:

1. The participation by one Canadian academic to the National Association of Economist and Accountants of Cuba (ANEC) 2012 Conference in Havana (July 2-5) as rapporteur of the Special Track on Social Economy.
2. The participation of three 3 Cuban officials to the Imagine 2012 Conference and the International Summit of Co-operatives in Quebec City (October);
3. The hosting of a ½ day workshop in Quebec on the development of Cuba's new economic model, featuring the Cuban delegates funded by IDRC and by other project partners.

An invitation was extended to four three Cuban colleagues to travel to Quebec City in October to participate in Canada's two premier IYC 2012 back-to-back conferences on cooperatives: IMAGINE 2012/Quebec International Summit of Cooperatives:

Dra. Grizel Donestevez Sánchez, Univ de Las Villas
Sr. Gonzalo González, Orgaoponico Alamar
Sr. Alfonso Regalado Granda, Comisión para la implementación (Los Lineamientos)

The above Delegation was joined by a fourth colleague, sponsored by Vancity Credit Union.

Sra. Mavis Dora Alvarez Licea, Proyecto de Palma

In early July 2011, email discussions were conducted between colleagues at Saint Mary's University, invited Cuban guests, colleagues at the University of Havana and within Cuba's cooperative movement to identify those areas of greatest interest to the Cubans leading up to the conference. Seven priority areas were identified:

1. Legal frameworks for co-operative development
2. Supervisory institutions
3. Public policy promoting co-operatives
4. Best practices of second and third tier coops
5. Best practices of worker co-ops, multi-stakeholder (social) co-ops, and agricultural producer co-ops in Quebec and elsewhere
6. Principle 6 – cooperation among cooperatives: How can Canadian and Cuban co-ops foster relationships?
7. The potential for co-op led economic and social development

OUTCOMES: THE QUEBEC CITY CONFERENCES

IMAGINE 2012 began on the evening of October 6th and ran until October 8th. The 2012 Quebec International Summit of Cooperatives began October 8th and ran until the 11th.

With the exception of one or two luncheon speakers, full Spanish translation was available throughout.

On arrival in Quebec City, the Delegation met to:

- a. Consider the list of seven priorities identified in July
- b. Identify their top four priorities.
- c. Familiarize themselves with the programs for both conferences,
- d. Establish a strategy to maximize their participation in these two important conferences.

Delegates concurred that while all seven areas remained of interest, the priorities were:

1. Legal frameworks for co-operative development
2. Best practices of second and third tier coops
3. Best practices of solidarity and social co-ops.
4. Best practices of worker co-ops.

In addition to the rich content of the two conferences, supplementary meetings were also arranged to allow the Delegation to explore these priorities in greater depth.

- Colin Dodds, President of Saint Mary's University.
- Chris Dobrzanski, SVP of Risk Management & Operations Vancity
- Yvon Bernier, Vice Pres. of Desjardins' International Development division
- Felice Scalvini, Lawyer, Euro Vice Pres. of Internat'l Cooperative Alliance (professional interest is cooperative legislation)
- Mr Abdallah Homsy, Pres. Quebec's worker-owned Taxi Cooperative,
- John McNamara (Business Manager) Union Cab of Madison (worker owned and operated coop)
- Rebecca Kemble (Board Member) Union Cab of Madison and President of the US Federation of Worker Cooperatives.
- Brian Branch, President and CEO of the World Council of Credit Unions.

On Friday October 12th a concluding workshop was held in Montreal. From the letter of invitation:

The workshop aims to introduce Cuba's transformation of its economy, and to allow our Cuban guests to better understand the unique way in which government and actors of the social economy work together in Quebec to support a development model centered around people and communities. Together, we will seek to identify ways in which actors of the social economy could support Cuban partners as they move to strengthen the cooperative sector in Cuba.

All members of the Cuban Delegation attended the Friday workshop, along with twenty seven invited guests. Three field visits were arranged for the afternoon. The first was to a social enterprise, the second was to Batir son Quartier (a coop housing development SE) and the third was to La Maison Verte, a retail natural products cooperative.

Annex 1 presents a list of the persons with whom the Delegation met during their stay.

All three IDRC-sponsored Delegates returned to Cuba on Saturday October 13th. Mavis Alvarez travelled to British Columbia for a 5 stop speaking tour.

FOLLOW UP - HAVANA FEBRUARY 2013

A full day meeting was held in Havana in February 2013 to debrief Delegates on their experience. Attending were: Dra. Grizel Donestevéz Sánchez, Sr. Gonzalo González, and Sra. Mavis Dora Alvarez Licea. All described the opportunity to attend the conferences in Quebec as the most significant of their career. Recommendations that arose from the meeting were the following:

1. To support Cuba in its development of a people-led, cooperative economy, a two-tracked process is recommended:
 - a. Academic
 - b. Practical (farm and non-farm)

2. Academic Track
Build and strengthen a cooperative network of universities across Cuba with cooperative studies centres (Grizel Donestevéz Sánchez)
 - i. University of Pinar del Rio (Alberto Vierra)
 - ii. University of Villa Clara (Victor Figueroa)
 - iii. University of Granma (Ruven Viellegas)
 - iv. University of Holguin (Maria del los Angeles Arias)
 - v. University of Havana
 1. Faculty of Economics (Jesus Cruz)
 2. Centre for Study of the Cuban Economy (Camila)
 3. FLACSO (Beatriz Diaz)
 4. Dept. Rural Studies, Faculty of Sociology (Nieurka Peres)

3. Practical Track – Farm Cooperatives
Support for cooperative training:
 - i. Cuba's Private Farm Sector (Mavis Dora Alvarez Licea):
Support ANAP's three year strategic plan to provide education and training on cooperative principles to ANAP administration, ANAP training centre, cooperative presidents across Cuba and the members of those coops (CPA^{*}'s, CCS's) that will be selected to form Cuba's first second tier coops.
 - ii. Cuba's Urban Agriculture Sector (Gonzalo González)
Work directly with members of UBPC Organopónico Alamar in Havana (workshops, measurement indicators) to build leadership in the understanding and adaptation of cooperative principles equivalent to Alamar's leadership in sustainable, organic urban agriculture. An accessible model to strengthen cooperative understanding and practice in other UBPC's.

* CPA, CPS and UBPC are, respectively, an Agricultural Production Cooperative, a Credit and Service Cooperative and a Basic Unit of Agricultural Production.

4. Practical Track – Non-Farm Sector

Support is also needed for the development of cooperatives in the non-farm sector.

Need to develop an inventory/profile of coop activity in the non-farm sector. Where are the existing cooperative incubators? What work are they doing? How can we best disseminate this information and support their efforts? For example, the University of Villa Clara has supported the development of a new materials supply cooperative.

PRELIMINARY NETWORKS

It was noted that Martino Vinci (UNDP/PNUD martino.vinci@undp.org) would be a logical partner to support both the Academic and the Practical track.

The Canadian Embassy and in particular Ambassador Levin have been exceptionally supportive of strengthening cooperative ties between Canada and Cuba.