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Vision Work Document

SOLIDARITY SOCIOECONOMY AS AN INTEGRAL NEW SYSTEM: GLOBAL VISION

SUMMARY VERSION

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ANNEX – DIFFERENT NAMES AND PRACTICES THAT ARE COMPLEMENTARY TO EACH OTHER

Marcos Arruda

Below you find a summary version of the papers written by participants of the Workshop on a Global Vision of a SSE, as well as by members of other Workshops of the WSSE. The method for producing this document included asking authors to revise and abbreviate each other's papers. This method created quite an integrative process of interaction, which made the final product even more collective and participatory. Please find the original documents in the webpage of the Workshop on Vision. It is worth recalling that the Workshop, when it finalized the Action Plan for the phase of work that is being concluded with the WSSE Dakar Meeting, Nov. 2005, decided to postpone the work on strategies to build a SSE and to overcome the obstacles and contradictions that are inherent in this construction. In the Action Plan for the next phase, starting in 2006, we hope to concentrate on an intensive dialogue about those strategies, and to focus on some comprehensive theme that is fundamental to an integral vision of a SSE.

A GLOBAL VISION OF A SOLIDARITY SOCIOECONOMY REFLECTIONS FOR DISCUSSION

Marcos Arruda (read by Ben Quinones)

Solidarity Economy in contemporary society emerged from the historic struggles of working people against exploitation and oppression¹. It differs from the dominant system in terms of the basic way by which society organizes consumption production, technology, trade, finance, education and communication. The dominant system puts capital, profit and accumulation of material wealth at the center of human endeavor and the objective to be maximized. Solidarity Economy recognizes humankind, both the individual and social being, not only as creators and producers of economic wealth but also as co-owners of material wealth, co-users of natural resources, and co-responsible for the conservation of Nature. The dominant system leads to the concentration of wealth among the few and the disenfranchisement of the many. Solidarity Economy strives towards producing and sharing enough material wealth among all in order to generate sustainable conditions for self-managed development of each and every member of societies, the peoples and the planet.

In early capitalism, the division of labor was based on capital owners paying a wage to his workers. Separated from capital, workers were treated less than human: they were regarded merely as a factor of production and their work, knowledge and creativity were traded like ordinary merchandise in the market. Cooperatives emerged as a reaction against the commodification of human beings and the alienation of their work. Trade unions were another form of defense and struggle for their rights as workers and citizens. As capital expanded beyond national territories and throughout the world, so did the system of wage

¹ Solidarity Economy is the basic form of socioeconomic relations of subsistence-based indigenous people. Such socioeconomic relations are not exploitative in nature but aimed at meeting the needs of every member of the society. The practice of manipulating the market to expropriate a greater share of the social surplus is alien to the natives in a predominantly subsistence economy. When society began to produce economic surplus, the issue of allocating the surplus became a dominant concern. Solidarity Economy in the contemporary society, while remaining true to its fundamental aim of meeting every need of the people, aims not merely at meeting the subsistence needs of the people but the just allocation of surplus to meet their basic requirements for living.

labor. The split between capital and labor became the hegemonic form of social relation. Practices of economic solidarity and reciprocity among organized labor and peasantry found their way to the South, through immigrant workers and peasants from Europe but also through the revaluation of the values that inspire indigenous peoples.

The struggles of trade unions and cooperatives have been complementary since they arose in the history of capitalism. The fact that capital, after having brutally resisted the labor organizations, finally accepted the trade unions was a workers' victory in the short run and a defeat in the medium run. Trade unions gradually accepted becoming part of the system hegemonized by capital and reduced their agendas to fighting for wages and for better employment conditions. In the cooperative sector, the workers' struggle to make human work, knowledge and creativity the reason to be and the main protagonist of the economy also gave way to the struggle for "a place in the sun" of the 'free' market.

SE Initiatives in Response to Neoliberal Globalization

As of the 1980s, a new phenomenon emerged called neoliberal globalization. It coincided with the oil crises of the 1970s and with the indebtedness crisis of a large number of impoverished countries of the South. The neoliberal ideology became a doctrine through the Washington Consensus advanced by the creditor countries with support from the IMF, the World Bank and the Regional Development Banks², according to which the debt of Southern countries would be renegotiated with longer deadlines in exchange for a growing control of national macroeconomic policy by the IMF. Due to the unilateral rise of interest rates, originated particularly in the USA, and the subsequent devaluation of national currencies against the US dollar, the debt of many Southern countries ballooned to levels beyond the capacity of Southern countries to repay. Southern countries were henceforth forced to increase exports at whatever cost and to make interest payments the first priority item of their national budgets. This became known as structural adjustment programs, a vital tool of neocolonialization that wreaked havoc on the Southern economies for the last two and a half decades

Neoliberal globalization is about removing regulations and controls on capital flows across borders and also within national territories. Everything is to be conceived as a commodity, including basic human needs such as work, land, food staples, health, education, sanitation and water supply. The State is supposed to completely withdraw from the economy, leaving it to the whims of the market forces, and making sure that the freedom of capital to go and come is preserved and protected. Human rights are, thus, threatened to become prey to the agents of the "free market" – if they generate a profit, they are respected; otherwise, they are left out of investment concerns. This is the environment global private corporations dreamed of to enable them to expand and become the dominant economic entity both at the national and international levels

The wanton application of these policies by Southern countries, particularly in Latin America and the Caribbean, has been disastrous. In 1980 there were 120 million poor

² The regional development banks include the Asian Development Bank, the African Development Bank, and the Inter-American Development Bank.

throughout the world; in 1999 the number had increased to 220 million, 45% of the world population; the richest 20% was almost 19 times richer than the poorest 20%, when the world average in 1999 was that the income of the richest was seven times larger than the poorest.

After a decade of blind devotion to the application of the Washington Consensus guidelines, Latin America stands on the edge of a precipice. Debt grew from US\$492,000 million in 1991 to US\$787,000 million in 2001. Railways, telecommunications, airlines, drinking water supplies and energy supplies were virtually wound up and handed over to giant US and European corporations. Public spending on education, health, housing and social benefits was reduced, price control was abolished, wages were frozen and millions of workers were dismissed by the new masters of the now privatised public undertakings. Massive imports (with the reduction of customs tariffs of course) to nourish the consumerism of the upper and aspiring middle classes caused national industries to disappear. Unemployment rose. According to the ILO (International Labour Organization) 84% of jobs created in the golden years of the "Washington Consensus" were temporary and poorly paid.³

As of the 1970s manual, intellectual and State workers began to try out new forms of organization of production, reviving the practice of self-management and developing participatory forms of ownership of productive resources, goods and knowledge while rekindling the debate over the paradigm of private property in the light of concepts such as the economic rights of peoples. In the 1990s, organizations in countries like Canada and France had coalesced into Social Economy forums, while in Latin America Solidarity Economy networks began to articulate individual worker-controlled firms and self-managed initiatives.

In the first decade of the new millenium, the World Social Forum served as a stage for the convergence of those forums and networks. Collectively-planned seminars and workshops took place and exchanges of views and experiences among participants from different countries and continents allowed for a convergence of concepts and a clearer definition of goals, action strategies and means of collaboration. Solidarity Socioeconomy (SSE) is gaining the status of an innovative paradigm for the XXI century. And, as its name shows, it encompasses economic self-managed activity aimed at individual and social well being, human work freed from the chains of survival and wage, cooperation as the main form of relationship between socioeconomic agents, mutual conservation as the main concern of the relationship with nature and solidarity-sustainability as the cultural valued underlying those relationships. This makes SSE a holistic, transdisciplinary science, system and praxis.

Reach of Solidarity Socioeconomy

Groups of individuals, sectors of the working societies, local governments and even privately-owned enterprises are showing increasing sensitivity and concern about the ill health of mankind and the Planet. Community self-managed development, cooperatives,

³ Xavier Cano Tamayo. 2003. "Burying the Washington Consensus", in *Sand in the Wheels*, n. 164, 2/16/03, Attacnews).

intercooperation, solidarity collaboration networks, ecovillages, democratic and sustainable development, conversion of private firms into self-managed workers' cooperatives, corporate social responsibility, participatory democracy, and matristic values as an alternative to the patriarchal and the matriarchal orders, these are some of the myriads of conceptual and practical innovations being discussed, researched, experimented, implemented.

SSE stands on the fundamental belief that economic development is not an end in itself, but rather a means to achieve human and social development. The overarching goal of SSE, therefore, is **socioeconomic, self-managed development** and the empowerment of working people to become the subjects of this process, individually and collectively; **the culture of solidarity** being the subjective foundation of SSE.

There is abundant evidence that the world of the "free market" and the "total individual", as well as that of the "total collective", have proved incapable of solving the most fundamental needs of the human person and the human species. Self-managed socioeconomic development and a culture of solidarity re-establish the natural links between economic activity and social well being and happiness. They shift the axis of development from the apparently "impersonal" market forces to the personal and the social individual. Latin America is building valuable processes towards such praxis.

In a SSE, the market, no longer the determining factor of productive and commercial exchange, regains its natural role as a means to facilitate the circulation of goods and services.

Conscious consumption replaces the compulsive pattern of consumerism and environmental destruction, supplanting the scarcity paradigm with an innovative, comprehensive concept of wealth and abundance, as a basis for an economy of frugality and sufficiency. Sharing surpluses among persons, communities, regions and countries becomes the most rational means of seeking the well being of all.

Production is no longer understood as a means to accumulate profits and to dominate markets. Say's law ("supply creates demand") is shifted from the center to the periphery of the economy, as needs and consumers' well being become the reference for the planning of production. Ownership is no longer linked to possession of capital, but rather to the contribution of the individual workers to the firm, in the form of work, knowledge and creativity. Management and the development of the firm become a concern of all owners, thus, of all workers.

Money, detached from its deadly role as a commodity and liberated from the cage of hypercentralization, regains its original purpose as means of exchange and material embodiment of human work, knowledge and creativity. Solidarity finance makes money produced by communities available to themselves, allows a myriad of currencies to develop and permeate society in creative ways, and facilitates movement of products to where they are needed.

Science and technology are both invited to be reborn in a context where micro-macro complexity and uncertainty are dominant parameters to define reality. It is in this context

that the human being begins to see her-himself not longer as the only, ultimate center of the Universe but rather as a humble, yet magnificent subject of her-his own development – as an individual, as a social being, as a species and a planetary being and as a cosmic being – side-by-side with other species in a Nature and Cosmos that play the mysterious role of mother and father of life.

On a more immediate time-scale, the challenge is to go beyond SSE as a poor solution for the poor. In Southern countries the colonial history and slavery have determined a culture of deeply rooted duality: domination-dependence and tyranny-submission. The historical barrier to emancipation includes lack of education and poor conditions of work and of human existence. The basic challenge to overcome is how to shift production and technology from the goal of immediate profit to the comprehensive goal of sustainable conservation and reproduction of life in its fullness as a right of all peoples. For SSE, this becomes the main criterion for determining what to produce and what techniques to select. For SSE, the sharing of productivity gains are as important as generating those gains. Only a system of shared ownership and management can guarantee this practice.

Trade stops being a win-lose game and becomes a means to make goods and services respond to the needs and wants of all citizens through fair, cost-transparent prices and a high concern for the fair remuneration of producers and the promotion of conscious, sustainable consumption patterns.

Education is transformed from an utilitarian process of accumulation of skills to compete in a darwinian world where the fittest are the strongest, towards an individual and collective process of self-education by learning about one's whole self in one's multiple contexts of existence, theorizing individual and social practice and learning how to do research in order to expand always further the horizons of one's knowledge and conscience. The goal is empowerment to become the subject of the development one's own individual and social potentials, attributes and qualities.

Communication breaks the boundaries of mere information and becomes a tool of dialogue, a bridge that connects people and develops bonds of mutual concern, altruism and solidarity.

Most crucial is the transdisciplinary methodology for developing the subjective background of objective socioeconomic transformation. The deconstruction and reconstruction of subjectivity includes a change in the ways of seeing and feeling the world and objective reality, and a personal and interpersonal process of cultural transformation that includes values, attitudes, behaviors, aspirations and modes of relation. The conceptual reconstruction involves the complementarity masculine-feminine, cooperation, reciprocity, freedom and solidarity.

Self-development in a culture of solidarity reinvents economics from the local to the global realms, has the potential to create social relations based on a win-win interaction between persons, economic agents, society and government, as well as between nations. Affirming globalization as a step forward in human and species development, SSE visualizes a shift from the narrow, competitive globalization of capital to the cooperative globalization of

awareness, of the respect for bio- and neo-diversity, the concern for a healthy, sustainable Earth and the search for human unity in diversity.

LA VISION DE GÉNERO EN ECONOMIA SOLIDARIA

Nedda Angulo (read by Marcos Arruda)

Presento abajo algunos argumentos sobre por qué me parece importante que en la construcción de una economía solidaria se adopte un enfoque de género.

Una primera afirmación que debo hacer es que creo que el género, como categoría que enfoca las diferencias de comportamiento y estatus que se construyen socialmente para varones y mujeres, enriquece el análisis económico. Desde un enfoque de género es posible plantear la pregunta ¿Cómo y por qué los varones y las mujeres tienen accesos y posicionamientos desiguales en la economía? Y otra que me parece fundamental ¿Qué vínculos existen entre las relaciones económicas y los roles de género?

Si bien no han sido tocados suficientemente por la ciencia económica, creo que todos los que nos planteamos aportar a la construcción de un nuevo orden económico debemos tener en cuenta que existen problemas de acceso diferenciado de varones y mujeres a los servicios sociales y al mercado laboral, que hay discriminación de género en los mercados laborales públicos y privados - expresada en una desigual incorporación de varones y mujeres no sólo al trabajo remunerado sino en la población económicamente activa -, que existe desigualdad de salarios entre varones y mujeres por igual trabajo - siempre desfavorable para estas últimas -, que hay segregación ocupacional por género, lo que está correlacionado con diferencias en los ingresos, al reservarse los sectores de actividad más dinámicos y de punta usualmente a varones.

Si se mira la economía con un enfoque de género, se puede apreciar también que hay desigualdades en el acceso de varones y mujeres a los recursos económicos, esto es al uso de la tierra, el crédito y la tecnología, y en el acceso al poder económico, es decir al derecho a la propiedad de bienes.

Y ciertamente, una desigualdad fundamental es la división sexual del trabajo productivo y el trabajo reproductivo. Como sabemos, con el término 'trabajo productivo' se refieren las tareas generadoras de ingresos, mientras que con el término 'trabajo reproductivo' se designan las responsabilidades no remuneradas por el cuidado y desarrollo de la gente. En casi todas las culturas, y a lo largo de la historia, las mujeres han sido responsables del trabajo reproductivo y de contribuir en las actividades productivas. Paradójicamente, el cuidado y desarrollo de las personas es incluido en el razonamiento económico sólo cuando su provisión se imparte desde el mercado o desde el Estado, pero no cuando se realiza en el hogar o la comunidad, aún cuando su ejercicio, particularmente en situaciones de restricción, requiere un ejercicio cualificado de racionalidad económica. Por extensión, las mujeres que lo realizan no son consideradas seres económicos.

En este punto me parece importante resaltar la interacción existente entre las instituciones sexuales y económicas, e interpelar la funcionalidad de los roles de género, antes que a las diferencias biológicas entre varones y mujeres, al orden económico establecido. Si tenemos

en cuenta el razonamiento económico imperante, no sólo en la teoría económica sino en el sentido común, es posible notar que se hace una equivalencia entre economía y actividades remuneradas, y que se asume que lo económico es únicamente la producción de bienes y servicios ofrecidos desde el mercado o el Estado, sin reconocer ese carácter en aquella otra esfera de trabajo dedicada al cuidado de las personas, que se da en los hogares, y en nuestros países también en la comunidad. A esto confluye una ideología que separa lo social de lo económico y atribuye a la personas motivaciones y comportamientos diferentes en el hogar y en el mercado. Se asume que los hogares, y por extensión la comunidad, son espacios de altruismo y de solidaridad, mientras que el mercado es el espacio de la búsqueda del interés personal, y por tanto de las retribuciones al trabajo. Esto no sólo condiciona una desventaja económica para quienes desarrollan las actividades de cuidado y desarrollo de las personas, al limitarse sus oportunidades de incursión en el mercado laboral y de autonomía económica, sino constituye un soporte al patrón de acumulación, al hacer invisibles costos reales del mantenimiento de la fuerza laboral.

Al respecto, otro supuesto extendido es que las familias constituyen una unidad económica con intereses comunes en cuanto a la remuneración recibida, lo que no refleja suficientemente la permanente lucha de intereses que existe en su interior, tanto sobre la magnitud del trabajo doméstico y su distribución, como sobre la forma de obtener y usar los ingresos que recibe el hogar. Cabe destacar que a mayor ingreso en los hogares no siempre corresponde un acceso equitativo de sus miembros a los potenciales beneficios generados, y que también existen divisiones sexuales en cuanto a gastos.

Ante el reto de consolidar la economía solidaria como un proyecto ético-cultural, que promueva valores y códigos orientados a una nueva convivencia humana, basada en el efectivo bien común, considero importante incorporar en su desarrollo una perspectiva de género, que le permita enfrentar también estas expresiones de inequidad, generando nuevos razonamientos económicos y propuestas que incidan en el reconocimiento social de la existencia de una esfera de producción de capacidades humanas, articulada a una esfera de producción de bienes y servicios, y el establecimiento de mecanismos de retribución social, que propicien un posicionamiento voluntario y con equidad de varones y mujeres en cualquiera de estas dos esferas económicas.

TOWARDS A VISION OF A SOLIDARITY SOCIOECONOMY

Ben Quinones (read by Marcos Arruda)

I. POSSIBLE DEFINITION OF SOLIDARITY SOCIOECONOMY

1. Governance and democracy (what is our concept of democracy – local, national, global levels)

By definition, democracy is governance by the people, of the people, and for the people. Governance is the authority to command the use of resources to meet the needs of society. The people's capability to wield power and exercise authority depends on several factors, some of the more important ones discussed in this paper are: (1) a common vision shared by various segments of the people and promotes social cohesion; (2) the technical/ technological and managerial capability of the people's organization to meet the needs of individual members and mediate the various interests which may sometimes be conflicting; and (3) the effectiveness of the monitoring and information system of the people's organization.

Common vision

A fundamental characteristic of solidarity-based democratic governance is the common vision shared by a group of people of a society that uses resources at its disposal towards meeting the human and social needs of all its members. This requires broad consensus on what constitutes such needs over a well defined time horizon. To arrive at this broad consensus, grassroots level assemblies have to be organized to enable the local people to participate in defining their human and social needs over a given period of time. In the initial exercise, local assemblies may not be able to balance the supply of local resources with the target requirements for meeting people's needs. But the lessons they learn in the process will guide them to make subsequent adjustments to ensure the adequacy of local resources, and/or that appropriate measures are taken to attract additional resources from other areas.

It is important for the people's assembly to agree on the organizational structure of solidarity-based democratic governance. This is one of the contentious issues in democratic governance. At one end, some will view solidarity-based democratic governance in terms of multi-stakeholder *representation* in government. Accordingly, the focus of interest is the quantity and legitimacy of the people's representatives in the assembly. On the other hand, there are those who view democratic governance in terms of *maximum participation* of the people in governmental decisionmaking. In this view, people's plebiscites and referendums are necessary instruments for promoting and for ratifying crucial decisions of the assembly.

These differences of views seem to diminish as one goes down to lower levels of socio-political organization. As an example, in several villages of the Philippines, the local people organize their own *Bayanihan* (i.e. solidarity) groups. These are self-managed self-help groups (SHGs) formed by local people themselves to collectively act on their human and socioeconomic needs. Members of the Bayanihan group feel that their destiny is in their hands. In other words, they are empowered. In the Bayanihan dynamics, *all members participate* in the decisionmaking of the SHG, and they feel that *they truly represent* their own households in the group.

Technical/ technological and managerial capability

Aside from cost considerations, participatory decisionmaking at the regional and national levels also depends on availability of time for this activity. Another serious constraint to democratic governance is the lack of technical and managerial capability of the members of Bayanihan groups. Invariably, Bayanihan groups need assistance from professional service organizations, including NGOs, in designing and implementing their financial and management systems. These services might be available locally at affordable costs, but maintaining support for such overhead costs at higher levels of organization and decisionmaking will pose a big burden on the people. As a result, socio-political mass movements tend to be localized and have serious constraints in building up an alternative governance structure nationwide.

Effectiveness of the monitoring and information system

A third factor influencing the governance capabilities of local assemblies is the effectiveness of its monitoring and information system. Program implementers, be they governmental or non-governmental organizations, should be able to monitor actions on decisions made and disseminate vital information that could enlighten future decisions and actions.

Governments do recognize the importance of constant monitoring and information dissemination, but the local structures established are meant to deal with the priorities of the government and not those of the people. Quite obviously, people are not interested to participate in government programs unless they distribute free or cheap resources. And when people participate in subsidized programs, they do not feel very well motivated to get involved in the government's monitoring and information system which has cost implications to them. Microfinance institutions (MFIs) have succeeded in implementing a program that integrates a highly effective monitoring and information system. The more frequent the monitoring and information dissemination activities are, the greater the chances of success of the program.

2. Nonhierarchical forms of governance and management

The classical model of hierarchical form of governance and management is exemplified by the traditional form of government where line agencies act as the implementing arms of the government's executive branch. Each line agency has a central head office directing the activities of its local branches which are located in key areas throughout the country. As

local branches get their marching orders from the central office, they often run into conflicts with locally elected government officials in the allocation and use of public resources.

In recent years, international funding institutions have promoted the decentralization of functions and devolvement of public resources to local authorities in an effort to encourage and strengthen local initiatives. In some meritorious cases, this has led to promising partnerships between the local government unit (LGU) and the people's organizations (POs).

A case in point is the Bayanihan Savings Program of Pasay city. Instead of recruiting its own staff to promote grassroots mobilization for local development, the Pasay City Council gave the leaders of *Bayanihan* groups an office in the City Hall and an annual budget to support their advocacy and capacity building activities. The Bayanihan groups subsequently established their own Bayanihan Development Council which provides oversight and coordination of the multitude of Bayanihan groups in more than 100 villages throughout the city. In contrast to the government's hierarchical governance structure, the Bayanihan Development Council (BDC) maintains a non-hierarchical structure: BDC policies and programs are discussed first at the *Bayanihan* group level and the group's decision is conveyed by the group's representative to the BDC. While a majority vote is sufficient to reach a decision on a policy or program, there are no sanctions to penalize a dissenting Bayanihan group that may opt not to participate in the implementation process. Owing to this, the BDC is constantly under pressure to inform and educate the local Bayanihan groups in order to maintain a high spirit of solidarity among them.

In the first quarter of 2003, the BDC mulled the establishment of a Bayanihan People's Mart to consolidate the consumer purchases of the Bayanihan group members. The idea caught fire among the Bayanihan groups and it appeared to be accepted overwhelmingly by the members. A fast-growing medium-sized Filipino-owned supermarket was approached by BDC to negotiate a franchise agreement. Eventually, an agreement was reached with the supermarket to launch the Bayanihan People's Mart as a cooperative undertaking with the Bayanihan members as shareholders.

The BDC conducted another round of information and mobilization campaign among the Bayanihan groups to encourage them to participate in the project. The BDC found, however, that only few of the Bayanihan groups were willing to risk their money to capitalize the Bayanihan People's Mart. The BDC realized that the participatory process of consensus building from conceptualization to actual implementation does not proceed in a smooth straight line. In other words, under the non-hierarchical form of governance and management, information and mobilization campaign has to be waged at every critical step of the way in order to rally the support of the people for successively more challenging forms of action.

3. Cooperation and Competition in Solidarity Economy

In neoliberal economics, competition among economic actors is considered to be good because it prevents the occurrence of monopolies and oligopolies. In contrast, cooperation

among capitalists to form monopolies or oligopolies is considered to be a bad thing. This is so because, in monopolistic and oligopolistic markets, manufacturers deliberately cut back production at a level where incremental demand commands the highest price as well as the largest profit. Competition will try to provide additional supply of goods at a lower price so as to attract customers, but the process will drive prices down until equilibrium is reached at a lower price and a higher volume of supply. The total economic benefits under a competitive equilibrium, it is argued, are much greater than those in a monopolistic or oligopolistic equilibrium.

Cooperation per se does not determine the goodness of an economic relationship. Producer cooperatives can also function as monopolies in capitalistic markets when they direct their members to deliberately reduce production, if not force the government to pay for excess production, in order to ensure a high market price for their products. This situation normally occurs in the North, where agricultural producers are constantly under pressure of competition from the South. In these circumstances, competition is a good thing for the South because it provides them an opportunity to benefit from the comparatively higher prices for their goods in the Northern market.

The notions of ‘cooperation’ and ‘competition’ take on new meanings in the context of solidarity economy. At the outset, it is important to establish the ethical basis of solidarity economy as contrasted to that of the neoliberal economy. The motive for economic risk taking in the solidarity economy is to meet the needs of all human beings, whereas that of the neoliberal economy is to maximize profit. These divergent motivations give forth qualitatively different forms of culture and practice. A profit maximizing society gives premium to wealth accumulation and a high social value to being financially wealthy. On the other hand, a socially responsible society gives premium to the distribution of wealth for meeting human needs and a high social value to being a compassionate humanist.

In the neoliberal economy, cooperation and competition are but alternative means of maximizing profit. In the same vein, economic actors should have the option of cooperation or competition as alternative tools for achieving the society’s socioeconomic goals. An enterprise may be owned and managed by the workers themselves but several “self-managed enterprises” should be allowed to engage in producing similar products to meet the demands of consumers.

In solidarity economy, one of the most crucial areas for cooperation among enterprises is the setting up of standards of ethical business practice, the socially determined basis of economic relationships. Solidarity economy enterprises must come to an agreement on: (1) their social responsibility towards their clients, their shareholders, their workers, the environment, their suppliers, and so forth; (2) the democratic processes by which they arrive at a consensus in decisionmaking, especially on the ethical standards; and (3) a system of certifying compliance with these standards.

When these ethical standards are set up, competition among solidarity economy enterprises will be geared towards their compliance with these standards. The absence of competition in solidarity economy will render the ethical standards moot and academic. Solidarity

economy competition is extremely necessary in order to uphold the ethical business standards on which the social responsibility of enterprises is founded.

II- AREAS AND SECTORS TO OUTLINE

* Empowerment

The notion of empowerment arises from a situation in any society where certain sections are marginalized and alienated from the dominant socioeconomic and political system. The marginalized sections of society generally have no access to the means by which the socio-economic and political benefits are generated and distributed. Having no access to these instruments leave them not only powerless, but also prey to its consequences, namely material deprivation and impoverishment.

In this context, empowerment connotes the creation of alternative means by which new socioeconomic and political benefits are generated and distributed. It is not simply a process of creating a 'window' within the existing socioeconomic and political system where the poor and the excluded could be accommodated. It is not merely a process of creating a "safety net" so that those who fall by the wayside of the dominant socioeconomic /political system could be given first aid. Empowerment, in the context of solidarity economy, means the creation of an alternative system for the poor and the excluded that may coexist side-by-side with the dominant system but at the same time compete with the latter for resources, and eventually socio-political dominance.

* Management

Management is concerned with the efficient use of resources to achieve the organization's objectives. In the neoliberal economy, it is generally accepted that the objective of an economic organization is to maximize profit. The overriding objective of enterprises in solidarity economy is to maximize the social benefits and meet the needs of all members of society. The motivation and actions of solidarity economy managers will, therefore, differ qualitatively from the managers of profit-maximizing enterprises. Solidarity economy managers will be very conscious about the compliance on their companies of the ethical business standards. They will be concerned about the direction and magnitude of their contributions to social development and the maintenance of ecological balance. They will be sensitive to cooperative networking and alliances with similar solidarity economy enterprises when sourcing their input requirements. They will strive towards fairness and justice in dealing with primary producers, ever seeing to it that workers earn fair wages, producers get fair prices for their produce, and stakeholders earn fair returns for their investments.

* Money-finance

Financial resources are the 'fuel' that energizes the economy. They facilitate the flow of resources from investors to producers, and from producers to consumers. As an alternative economic system, solidarity economy operates on a unique set of standards and principles that unequivocally sets it apart from the dominant system. Empowering the economic

actors of this alternative economic system requires the establishment of a unique system of finance that totally supports the ethical standards of solidarity economy.

This unique system of finance - “Solidarity finance” or “Finance of Solidarity” (FinSol) - is a financial system specifically designed to facilitate the production and distribution of goods and services produced by solidarity economy enterprises. [By definition, solidarity economy enterprises are those enterprises which comply with the ethical business standards of solidarity economy. Based on such compliance, it is possible to classify solidarity economy enterprises along a specified range of performance, starting from the bottom performers to the top performers].

Solidarity Finance should also be able to offer a variety of financial instruments to cater to the various needs of solidarity enterprises and clients, including deposits, loans, insurance, and transfer payments. The terms and conditions of Solidarity Finance should also be fair and just, and conforming with the ethical business standards of solidarity economy.

Whether Solidarity Economy should have its own unique monetary currency is an important issue that stakeholders have to thresh out. In countries where experiments of “social money” are tolerated by the Central Bank, it might be possible to create alternative currencies to fuel the exchange of goods and services among the poor and the excluded. The advent of “plastic money” or credit card provides an alternative avenue for creating purchasing power and a unique payment system for solidarity economy. It should be possible for stakeholders of solidarity economy to design a credit card that is internationally accepted by all solidarity enterprises throughout the world. This could be done in collaboration with ethical banking institutions that are actively operating in many countries of the world. The credit card is more versatile and powerful than “social currency” in so far as creating new purchasing power in the hands of the consumer is concerned. As a payment system, it is more convenient and less cumbersome compared to the bills of the “social money” variety. Moreover, should it be possible to create an internationally accepted solidarity credit card, Solidarity Finance can really make the world go round for solidarity economy.

LO HUMANO COMO EJE EN LA VISION DE UNA SES

Chilo Villareal (read by Nedda Angulo)

Uno de los principales elementos del Nuevo Paradigma del Siglo XXI, desde la visión de la socioeconomía solidaria, es, sin duda alguna, la revaloración de lo humano, entendido como aquella energía que nos permite ser, identificarnos, diferenciarnos, individualizarnos, y relacionarnos y articularnos con los otros seres del planeta, la sociedad y la naturaleza.

Se trata, así, de construir una economía centrada en los seres humanos y sus anhelos de resolver todas sus necesidades, de una manera armónica con la naturaleza y la sociedad, por ser todos parte de un sistema planetario en el cual nos estamos desarrollando y complejizando, para llegar a nuestra máxima universalización y realización.

Para ello, es importante considerar diversos referentes históricos. Uno importante es la comunitariedad de los pueblos indios de América Latina. Su economía comunitaria y reciproca es realmente economía solidaria. Esta herencia cultural, económica y política es y sigue siendo una fuente inagotable en la construcción de una economía solidaria, más allá de la realidad indígena. En los pueblos indios, el concepto de ser humano no existe solamente en el sentido individual, sino como pueblo, así es como alcanza su dimensión universal, su mayor complejidad, pues el ser humano es la síntesis de las creaciones de los pueblos, formados por hombres y mujeres.

En esta cosmovisión, el trabajo es la energía de este ser humano-pueblo que hace posible la transformación de la naturaleza. El trabajo se produce a partir de la individualidad, pero alcanza su máxima expresión en la comunalización, es decir, cuando se hace tequio, faena, ayuda mutua, trabajo-servicio voluntario. Es, además, una energía de recreación, que no se puede aprisionar, pues busca la restitución de su derecho a la libertad. Por su trabajo, cada quien es co-creador(a), al mismo tiempo que satisface sus necesidades.

Mediante el trabajo colectivo, el ser humano-pueblo se relaciona con la naturaleza, asumiendo a los demás seres vivos como iguales en cuanto a creación original, pero reconociendo su superioridad, en tanto que, habiéndose desarrollado y complejizado más que los demás seres vivientes, tiene la inteligencia y la libertad de orientar su energía transformadora respecto a los otros seres vivos, a quienes respeta y con los que convive. En su relación con la naturaleza, el ser humano-pueblo se recrea, porque transformar la naturaleza conlleva necesariamente su propia modificación, pues la naturaleza actúa indirectamente sobre el ser humano-pueblo para mejorarlo cada vez más, y ayudarlo a seguir reconstituyéndose y reconfigurándose.

Una economía así es la que postula la primacía del ser humano-pueblo sobre el dinero y las cosas materiales, y cuestiona la concepción de desarrollo económico que tiene la sociedad occidental, en la cual el dinero es el que determina el valor del ser humano-individuo, y de los pueblos- seres humanos- colonizados, así como de la energía transformadora y del trabajo que produce el oro.

Cuando hablamos de socioeconomía solidaria, nos estamos refiriendo a la economía que busca satisfacer las necesidades de las familias, de las comunidades, de las organizaciones, de la sociedad, de la naturaleza y del planeta, del cual todos formamos parte. También, son las personas en su proceso de producción y transformación, mediante el cual satisfacen sus necesidades y siguen acumulando experiencia, que transmiten y comparten con los otros.

Fe en que "otro mundo es posible", ¿cómo se efectúa?

ECONOMIA SOLIDARIA Y LOS DIVERSOS MODOS DE VIDA DIGNA

Luis Lopezllera Méndez (read by Marcos Arruda)

El gigantesco choque de civilizaciones que resulto' de la ocupacion europea de las Americas en el siglo XVI no ha tenido una resolución positiva. Prevalecen muchas contradicciones originales, a veces manifiestas violentamente, otras veces en forma latente y disfuncional. Es importante hacer notar que los naturales de América y Africa han contado con visiones cosmocéntricas, basadas en el don y la reciprocidad, el sacrificio y la comunión, que les ha permitido sobrevivir a pesar de ser aprovechados y diezmados por un poder centrado en una visión antropocéntrica y basada en la ley del más fuerte.

Esta realidad se conmocionó en el siglo XIX con las ideas liberales que acompañaron las revoluciones industrial y política en Europa y la independencia de las colonias sajonas en Norte América. El concepto liberal de Democracia permeó el continente y se instalaron nuestros diversos Estados Nación, a imagen y semejanza de aquellos consolidados por la historia del Capitalismo, pero careciendo de una propia consistencia económica, tecnológica y militar.

El siglo XX nos presenta las distintas crisis del capitalismo y los esfuerzos violentos por superarlo, que generaron revoluciones y guerras mundiales, así como aquellos esfuerzos por encontrarle nuevos progresos más incluyentes bajo el concepto de Desarrollo (inaugurado por Truman hacia los "subdesarrollados" en 1949). Históricamente, tanto las revoluciones como los desarrollos han sido un patente fracaso como modelos genéricos en todo el mundo, produciendo dictaduras reales o democracias virtuales, incapaces de resolver el trágico dilema de la miseria creciente entre muchos y la concentración de recursos entre pocos. Pobreza, violencia, temor, desorganización, destrucción del medio ambiente, es el saldo mayoritario que campea en nuestras sociedades.

Afortunadamente subsisten y siguen emergiendo experimentos, movimientos y luchas con ecuaciones inéditas, en la propuesta de formas nuevas de equidad, convivencia y progreso tanto material como espiritual. Se precisa poner toda nuestra inteligencia y voluntad en diseñar y poner en práctica nuevos paradigmas y nuevas estrategias para superar un modo de vida que resulta perverso y destructor de la sociedad misma. Hoy, la realidad de cada quien está condicionada por un fenómeno avasallador de carácter global y que requiere cambios en nuestros conceptos y prácticas de tiempo, espacio y energía.

Los esfuerzos por el Desarrollo durante la segunda mitad del siglo XX han sido muy aleccionadores. La Guerra Fría nos ofreció dos alternativas antagónicas: Reforma a partir de la libre Empresa o Revolución a partir del Estado planificador. Algunos países ensayaron una mezcla, como la economía mixta de los años 40 a 70 en México (tras su revolución de 1910 y derivando en una "dictablanda"), otros como Cuba del 59 a la fecha (o Nicaragua, solo una década a partir del 79), la cual ha persistido como un nuevo Robinson Crusoe (derivando en una "dictadura") mientras otros perduran en el liberalismo,

unos en paz como Costa Rica y otros en plena violencia como Colombia. El notable hito de Chile más las distintas insurgencias por cambios radicales en Argentina, Brasil, Perú, etc., han sido eliminados o neutralizados con la intervención de la potencia capitalista mundial. Se reponen modelos compatibles y consecuentes con una implacable Globalización que cosecha el colapso inesperado de la Unión Soviética.

En México históricamente podemos mencionar las experiencias de los modos revolucionarios entre 1910 y 1940, donde gobierno y campesinos logran la Reforma Agraria y se recrean los Ejidos, donde la propiedad de la tierra explotable es nacional y el usufructo democrática y productivamente familiar es transmisible de padres a hijos. También, el Estado reconoce la propiedad tradicional indígena llamada Comunal bajo control colectivo según usos y costumbres. La incidencia de los agentes gubernamentales es más notable en el primer caso pues la fuerza política de los ejidos les resultó más útil que la segunda. Sin embargo, la vigencia de estas formas resulta hoy marginal ante la debacle de la autosuficiencia del campesino provocada por el neoliberalismo que trasciende fronteras, somete gobiernos e impone un mercado excluyente. De ahí que la desertificación del campo y las migraciones masivas a las grandes urbes y los Estados Unidos sean hoy un trastorno estructural patente.

Los intentos por generar en gran escala empresas sociales desde el gobierno (1970-1982) bajo la fórmula flexible de Sociedades de Solidaridad Social, realizados bajo una perspectiva entre populista y tercermundista, apoyándose en los recursos petroleros del país, no resultaron ante el embate del Monetarismo mundial de los años 80 (Reagan y Thatcher). Algo parecido sucedió en Perú con el sistema SINAMOS iniciado por un pasajero régimen militar.

Europa y luego Canadá nos aportan desde el siglo XIX los esfuerzos del socialismo llamado utópico y materializado en las Cooperativas, luego respaldadas también por la Doctrina Social de la Iglesia. El cooperativismo es fomentado desde instancias gubernamentales y eclesiales, en nuestro caso mexicano por vías paralelas y hasta antagónicas, habiendo prevalecido más las segundas mientras que las primeras resultaron politizadas y monopolizadas por un partido simulador y luego corrompidas por los intereses burocráticos del gobierno. Algunos hitos se mantienen notablemente vivos donde destaca el movimiento de ahorro y crédito hoy acosado por legisladores y gobernantes interesados en uncirlo a los sistemas bancarios capitalistas. Las cooperativas de consumo, de producción, de vivienda, etc., existen en forma precaria y más bien excepcional, como es el caso de Tacámbaro, un hito histórico en México.

Cabe citar aquellas empresas socializadas, que, habiendo quebrado en el marco de generalizadas crisis económicas (1982, 1994), son asumidas por los trabajadores para ser administradas en forma cooperativa. Tal es el caso de la Refresquera Pascual que por hoy establece una lucha, como David y Goliat, ante la Coca Cola y similares, fomentando una red de proveedores locales y una cultura más social y solidaria. Pero, salvo casos como el citado, el acceso de los trabajadores a la propiedad y gerencia de empresas ha resultado excepcional y en situaciones extremas, con sindicatos débiles o corruptos más proclives al abandono. El acceso mediante el accionariado es tan limitado como baja la capacidad de ahorro e inversión. La participación en la gestión de la empresa es hoy un sueño poco

viable ante la imposición de fórmulas tecnocráticas y fusiones con liquidaciones frecuentes engrosando el desempleo y siempre a favor de una sociedad anónima cada vez más transnacional y ajena.

El desempleo resulta un problema mayúsculo. La gente, tanto de las capas populares como de clases medias, trata de resolver su sobrevivencia diaria entrando a la llamada economía informal, los más mediante el comercio callejero y otros ofreciendo sus servicios de puerta en puerta o en frustrantes eventos (bolsas y ferias) de oferta y demanda de trabajo. Los gobiernos a cualquier nivel, nacional, estatal o municipal, crean fondos para fomento de la microempresa mediante microcréditos, una política sectorial apenas de contención de la pobreza por carecer de estrategias más integrales. La banca internacional, Banco Mundial, Banco Interamericano de Desarrollo, aportan fondos para subsidiar la extrema pobreza mediante becas de salud y educación para niños y ayudas a la tercera edad. Estos subsidios siempre insuficientes pretenden aliviar la pobreza extrema pero en realidad establecen una gran dependencia de la gente asistida, implican discriminación a muchos pobres no asistidos y siembran gran resignación ante las estructuras económicas vigentes, las cuales efectúan la recuperación ahora en forma privada de dichos subsidios, mediante sus manejos mercantiles.

Toda iniciativa microempresarial a partir de la pobreza se enfrenta al mercado establecido enteramente indefensa y con remotas posibilidades de éxito. El comercio popular es un verdadero dolor de cabeza. Son incontables los casos en que el trabajo y sus productos se estancan sin encontrar salida ante un mercado poderoso que impone en su propio provecho el juego unilateral de capital, oportunidades, publicidad y precios. Mucha gente huye de esta realidad sin salida, los más capaces se aventuran más allá de la frontera norte y existiendo mercado para su mano de obra no solo sobreviven en mejores condiciones sino que envían las ya famosas remesas de dinero a sus familias, constituyendo en México la segunda fuente de divisas después del petróleo e incluso antes que el turismo.

Autopoiesis.

Ante los desafíos y modelos fallidos o insuficientes, se impone la tarea de encontrar una ecuación que restaure la esperanza y recoja las mejores energías de todos los sectores sociales para salir de esta suerte de "hoyo negro" en que nos encontramos. Se trata de una globalización demoledora, una suerte de guerra sorda y muda declarada contra la gente común. Se carece conciencia de ello. Se necesita una profunda reconversión de valores y prácticas, lo que yo denomino una Mutación. La solución surgirá a partir de las energías más elementales de nuestra gente, su trabajo creativo para la satisfacción de necesidades y aspiraciones más legítimas. Se hace necesario un paradigma que combine lo global con lo local, trabajando en muchos sentidos más la calidad que la cantidad, una suerte de acción reflexión en pos de una "glocalidad".

Hasta ahora, hemos buscado fórmulas todavía bajo una visión mecánica, sectorial, herencia del pensar newtoniano, cuando debemos, en el siglo XXI, pensar de otro modo, en forma sistémica, integral, inspirados por las visiones de Einstein. En especial precisamos inspirarnos en aquellos biólogos como Varela y Maturana que nos enseñan cómo la vida se reproduce a partir de sus más mínimas expresiones, a partir de sí misma y no de

instituciones (tan obsoletas como las que heredamos y padecemos hoy). Ellos crearon el concepto de "autopoiesis" y que se refiere a la propia recreación, la cual no está lejos del concepto de poesía donde se da énfasis a la imaginación y lo sorprendente. Tenía razón Schumacher cuando señaló hace más de 30 años que "lo pequeño es hermoso", solo nos falta organizarlo en forma de redes autoreferentes y autosostenibles, aspirando a que "otra globalización es posible". Estamos invitados a operar en medio de una gigantesca composta, donde en medio de la descomposición general va surgiendo la nueva vida, inédita y fecunda. Habrá que recurrir a la teoría del caos, donde se nos explica que tras el evidente desorden va emergiendo una mayor complejidad que recompone los elementos en nuevas concertaciones y expresiones de vida. En ello, las dimensiones más bien minúsculas, incluso las invisibles o intangibles, que no son contempladas en los esquemas formales y aparatosos, adquieren una importancia fundamental, seminal, tal como el "efecto mariposa" nos lo quiere hacer entender.

La economía profundamente individualista, hoy dominada por el afán de lucro y ganancia, del juego del más fuerte y poderoso, a la base de las guerras actuales, está siendo fuertemente cuestionada desde la dimensión de lo común y por los valores del don y la generosidad. Igualmente, sobre el valor de uso y el valor de cambio, practicados por la economía capitalista, se recrea el valor de relación, para someter el precio de lo utilitario, lo individual y material, al aprecio del prójimo, lo social y espiritual. Es esto lo que está en juego en este parteaguas histórico de un mundo atterradoramente materialista y letal hacia un mundo más elevado y vital, equitativo e incluyente, donde nadie resulte disminuido en su dignidad y libertad.

Por una Economía Solidaria y una Vida Digna y Sostenible.

En México estamos experimentando varios ejes de investigación-acción en materia de economía que hemos llamado solidaria:

- Recrear circuitos de producción, distribución y consumo, donde la gente incorpora en sí misma dichas funciones para formar una ecuación que resulte sistémica y lo más autosuficiente posible. Hay que repensar el binomio trabajo-necesidad para superar los esquemas de una sociedad de consumo depredadora, empleos inexistentes y reinventar la vida cotidiana en función de nuevas utopías de "ser y existir" en vez del "tener y dominar".

- Repensar el concepto y la práctica del crédito, a partir de la evolución histórica que el dinero ha tenido y terminado en ser un instrumento hipnótico al servicio del capital financiero representado por los bancos. Los nuevos sistemas contarán con símbolos de valor real, bajo control social, que permitan emprender la construcción del futuro con apoyo de un auténtico crédito social sin fines de lucro ni falsa escasez. Los ciclos económicos se repiten con nuevas anécdotas y circunstancias pero, en el fondo, plantean los mismos problemas y desafíos. Importante será estudiar las propuestas del Movimiento Creditista (de ingeniero militar Douglas) surgido en los años 20 y sofocado por los gigantescos conflictos posteriores: Nadie en el mundo sin un "dividendo" de dignidad y sostén. Igualmente estudiar las miles de experiencias que en el mundo se han originado a partir de los años 80, inspirados por los "**Local Employment and Trade Systems, LETS**" en Canadá, así como los que se dan en México bajo la fórmula indígena del trueque y las

alternativas más modernas del multitrueque, emitiendo un dinero no bancario, no usurero ni especulativo, bajo control social.

-Las dimensiones usuales micro y macro resultan hoy superadas por dos fenómenos: lo multimolecular y lo global hegemónico. Se impone lo que denominamos una Mesoconomía, una nueva manera de concertar y articular los diversos sectores y clases sociales (engendrados y contrapuestos por la sociedad industrial y hoy rebasados por la sociedad cibernética). Confiamos en que la sociedad civil se transformará en medio de una creciente diversidad, en una auténtica sociedad orgánica y plural, el Estado se transformará en un verdadero servidor público y la empresa privada se socializará (accionistas, directivos, productores, abastecedores, consumidores, vecinos, medio ambiente, bien común) y generará aquellos valores que resulten vitales. Iglesias, academias, medios de comunicación, deberán converger en una campaña a favor de la equidad y la sostenibilidad. La capacidad de efectuar sinergias vitales a varios niveles diferenciará la paja del grano.

-Se precisa una nueva concientización en términos de los valores y paradigmas fundamentales implicará la aplicación de todos los medios educativos y comunicativos. La capacitación para nuevos desempeños donde el negocio desempleador dará el paso al ocio empleador, donde la producción de cosas dará el paso a la comunión con la cultura y la protección del medio ambiente. Los métodos de investigación acción participativa superarán los afanes escolarizantes del pasado ya cuestionados hace más de 30 años por Iván Illich. Si Paulo Freire acuñó la "pedagogía del oprimido" igual se hace necesaria una "pedagogía del opresor".

Estamos en el umbral de una nueva época, una nueva civilización, cuyo parto implica el darnos cuenta del absurdo a que ha llegado el sistema capitalista mundial, incapaz de resolver las necesidades más fundamentales de todos los habitantes del planeta, divididos como "ricos" y "pobres" en una violenta brecha insalvable con las categorías actuales de análisis y organización.

Sin duda estamos experimentando fantásticos logros en materia tecnológica y comunicativa, como el uso planetario de Internet, pero estos aún carecen de brújula. Hay gran confusión resultante en una suerte de Implosión, una contracción de lo funcional dejando fuera de ello a millones de anomias al garete, convertibles más pronto que tarde en minas explosivas. Lo paradójico es que lo funcional descansa en un fraude mayúsculo pues se ha puesto en el dinero toda la fe, siendo que sus manipuladores están adictos a la producción de más dinero sin valor y sin referencia a la realidad. Los grandes capitales han concentrado todo tipo de propiedades (urbanas, industriales, turísticas, territoriales, corporativas) sin el mayor esfuerzo que el manejo especulativo de cifras y deudas impagables. Dichas propiedades pierden valor de uso, se transforman en burbujas parásitas y solo luchas como el "Movimiento de Trabajadores Sin Tierra, MST", en Brasil, o los "Caracoles" indígenas en Chiapas, los que rescatan y socializan dichas propiedades y territorios para ponerlas al servicio de los comunes. Los espacios tradicionales "privados" y "públicos" serán cuestionados cada vez más si éstos continúan funcionales solo a favor del acérrimo individualismo heredado del siglo XX.

Énfasis quiero dar al elemento Crédito y formas de intercambio solidario, no excluyentes, no usureros, no especulativos, no criminales, donde la gente pueda contar con la confianza mutua, la reciprocidad y la responsabilidad constructiva, germinando nuevamente los tejidos sociales, pues si no logramos reconstruir una auténtica confianza entre los pueblos y las personas mismas, estaremos cayendo en el abismo de la atomización, el suicidio colectivo. Y crédito implica Fe en una humanidad siempre renovada. Solo así, "otro mundo será posible".

Esto es un desafío no solo continental sino que llama a todos los pueblos del mundo para adquirir conciencia de su gran riqueza identitaria distinta del "american way of life". Miles de identidades culturales a partir de las cuales se diseñarán en forma inédita los modos de seguridad y sostenibilidad que los pueblos necesitan y que confiamos aportarán a un nuevo concierto mundial más justo y más humano.

SEGURIDAD SOCIOECONÓMICA

Claudia Danani (read by Oriol Alsina)

La Seguridad Socioeconómica es el conjunto complejo de condiciones en las que los sujetos reproducen su vida. Incluye condiciones inmediatamente materiales (de ingresos y protecciones) y de expectativas individuales y colectivas para la satisfacción de necesidades concebidas como derechos, compatibles con el grado de desarrollo de la sociedad a la que pertenecen.

Los valores

La Seguridad Socioeconómica es una parte indispensable de una economía solidaria, pues ciertos umbrales de certidumbre son indispensables de la vida humana. En la economía competitiva, la incertidumbre acerca de las posibilidades y las condiciones para la reproducción de la vida genera temor, y este alienta comportamientos primitivos e individualistas en las personas. Una mayor certidumbre acerca de las condiciones y posibilidades de desarrollar la propia vida (en sentido amplio) libera a las personas de las urgencias que las atan a lo inmediato, que las esclavizan a lo elemental y que generan una dependencia subordinada.

Así planteada, la seguridad socioeconómica se vincula con la solidaridad y con una libertad genuina. Respecto a la solidaridad, debemos plantearnos como objetivo, buscar los modos de satisfacer las necesidades y los derechos desde un punto de vista colectivo. Es decir, que idealmente no habrán sido alcanzados hasta que no sean satisfechos por todos, y cuya búsqueda, por lo tanto, no podemos abandonar hasta que todos los seres humanos no hayan accedido a ellos. Ello implica, también, que los modos de satisfacción tienen que ser compatibles con esa aspiración a una seguridad amplia y de largo plazo: la solidaridad en el objetivo (que *todos* satisfagan esas necesidades y accedan a esos derechos) no puede desentenderse de *formas de satisfacción*. De lo contrario, sería puramente declamativa.

Respecto a la libertad, la seguridad socioeconómica se vincula como horizonte: el horizonte de la interdependencia, de la convivencia (vivir-con-otros). Por lo tanto ni es lo mismo que la libertad en sentido liberal (del individuo en sí mismo), ni que una interdependencia comunitaria pre-moderna, estructurada en base a jerarquías; ni tampoco que una comunidad ideal sin conflictos. La “libertad genuina” es la libertad para el máximo desarrollo de grupos e individuos, de acuerdo con las condiciones de la comunidad nacional, regional, y más amplias. Así, una vida más segura es una vida más libre, que entonces revierte también sobre la solidaridad.

Las instituciones

La seguridad socioeconómica como un pilar de una socioeconomía solidaria puede y debe ser pensada en dos planos:

Plano macrosocial: pues en su máxima amplitud y en el largo plazo involucra a las formas de organizar la sociedad en su conjunto. Nos obliga a plantear en el debate público la discusión sobre las fuentes de la seguridad socioeconómica, que no pueden ser la propiedad (fuente propiamente capitalista de seguridad) ni el empleo (fuente “bienestarista” de seguridad). En perspectiva, la cuestión del Estado (de las formas políticas de esas fuentes, de la organización, etc.) es el eje de este plano.

Plano institucional (meso y micro): se requieren instituciones que regulen la convivencia y que proporcionen respaldo auténtico para las generaciones presentes y futuras. Las “instituciones” no deben ser vistas como algo externo a la construcción de la socioeconomía solidaria, sino como acuerdos en torno de reglas y prácticas que deben tener cierta estabilidad, porque es de cara a ellos que podemos exigir a los otros y comprometernos con los otros. Eso, a la vez, nos lleva de nuevo a pensar en el Estado; o, mejor dicho, en la estatidad que debe construirse y en el proceso de su definición.

Algunas de esas instituciones serán enteramente autogestivas. Otras deberán inventar formas de *verdadera participación*. Pero debemos plantearnos como problema la relación entre autogestión y autoprotección, y preguntarnos si a veces no las identificamos indebidamente. La autoprotección contiene un germen de particularismo que va a contramano de solidaridades amplias, pues ata la seguridad propia a anillos de solidaridad que son estrechos, que involucran a grupos de referencia identificables. En ese sentido, la autoprotección puede ser un camino de transición adecuado, que debemos estimular porque en su curso se da respuesta a problemas inmediatos y se aprende con otros. Pero deberíamos pensar la autoprotección en esos términos: como transición hacia la creación de mecanismos de protección más amplios.

Para una socioeconomía solidaria, las instituciones deben atender dos problemas principales: a) evitar que los sujetos se vean sometidos a elecciones de orden ético y moral (renunciamiento, generosidad, egoísmo, etc.), que están siempre presentes, pero que las instituciones pueden orientar o reforzar en uno u otro sentido; b) las condicionalidades. Este es particularmente relevante para grupos como mujeres y ancianos, pues por distintas razones pueden seguir siendo “vulnerables” en las experiencias de SSE (la comunitarización de la vida puede convertir a las mujeres en responsables del bienestar, y a los ancianos en dependientes de la solidaridad de los otros). En tales casos, la solidaridad corre el riesgo de personalizarse y la libertad se pierde.

ECONOMIA SOLIDARIA, REDES Y CICLOS: LA FUERZA DEL IMAGINARIO

Heloisa Primavera (read by Luis Lopezllera)

"Ningún problema puede ser resuelto dentro del marco teórico que lo generó". A. Einstein.

Heloisa se pronuncia por una visión *plural* de la Economía Solidaria, basada en su experiencia en la academia, en el mundo de las ONGs y en la conjunción de actores del Estado, Mercado y Sociedad Civil. Acentúa el carácter *pluralista* frente a la compulsión dominante hacia el pensamiento único y el *rechazo de la diferencia*, compulsión enmarcada por el inconsciente colectivo, las epistemologías implícitas y la lógica reproductiva de las instituciones. Heloisa se aboca a renovar el análisis de términos que si se cristalizan dificultarán la renovación de las visiones de la Economía Solidaria.

Paradigmas e ideologías: el enigma del huevo y la gallina.

La palabra paradigma ha sufrido abusos y desgastes. Heloisa, remitiendo a Kuhn (1972), considera como "paradigma" aquel conjunto de creencias, teorías y epistemologías - conscientes o inconscientes- derivado de la Ciencia normal y que la Ciencia revolucionaria acuñará solo en su próximo ciclo, cuando la cantidad de anomalías presentes sea suficiente para que la comunidad científica acepte el "fracaso" de la teoría anterior y la hunda total o parcialmente, junto con su paradigma de origen.

Pero el sentido común no se desprende automáticamente del paradigma dominante y los científicos siguen hablando solos en sus feudos. Así es que las Ciencias Sociales aún siguen viviendo el paradigma newtoniano con la pretensión de poder explicar los hechos sociales. Allí es cuando existe la posibilidad -casi siempre vacante- de que el científico intervenga desde su *responsabilidad ciudadana* para contribuir de alguna otra manera para la *transformación del mundo real en tiempo real*: allí es cuando puede elegir salir de la discusión estéril en el terreno de la ciencia, aceptar el estado de transición paradigmática si cree estar dentro de él, y meterse de cabeza en la ideología, sin problemas, para asumir su responsabilidad en esta construcción que aún no tiene horizonte visible ni es objeto de la ciencia normal o revolucionaria -de la Economía Solidaria.

La Ciencia Económica, que aún se concibe como la administración de recursos escasos ante necesidades siempre crecientes, no ha despertado al cambio aportado por su hermana bastarda -la tecnología- que logró transformar en abundancia lo que antes parecía que faltaba para que los seres humanos tuvieran comida para sobrevivir... Pero paradigmas e ideologías son parientes que se llevan mal y reclaman autoridad el uno sobre el otro: *¿Quién viene antes? ¿Es posible una ideología fuera de un paradigma? ¿Es posible vivir fuera de un paradigma? ¿En qué paradigma vivimos?*

Heloisa señala que para no paralizarnos se elige que el *paradigma* viene antes, es previo a la posibilidad individual de racionalizar y condiciona la misma formulación y elección de

creencias... y por lo tanto condiciona la *ideología* que abrazamos, en teoría con nuestras declaraciones o en las prácticas sociales a las que adherimos. Pero ello no es sin consecuencias ni responsabilidades. La *responsabilidad ciudadana* del científico pasaría entonces a formar parte de una *ideología* -otro tipo de opción- y dejaría en el mismo paradigma a más de una ideología... Situación que no agradaría a los adeptos del pensamiento único, principalmente, ni a quienes somos más subversivos respecto al orden instituido.

Visión de una nueva economía: ¿múltiples caminos posibles?

En la Economía Solidaria hay gran diversidad y heterogeneidad, donde nos confrontamos con sus contradicciones y la inexistencia de ejemplos acabados de una "nueva" Economía en todas sus dimensiones. Siempre hay algún aspecto que se privilegia: o la producción o la comercialización o el consumo. Cuando observamos la escasa producción teórica que acompaña las experiencias de terreno, no está a la altura de una estrategia que nace con vocación de generar Utopía. Raramente se supera la etapa de *descripción de lo que existe*, siempre hecha desde dentro del paradigma hegemónico. Encontramos más ideología que producción teórica, más necesidad del cambio en las reglas del juego social pero desde un razonamiento parecido desde hace varias décadas. Por suerte, la tecnología le viene ganando a la ciencia y provocando nuevas prácticas sociales y reflexiones. La academia va detrás sin inspirar ni explicar. Heloisa nos comparte algunos hallazgos que vienen contribuyendo a salir del paradigma dominante por varias puertas:

* Waldemar de Gregori y su *Manifiesto Proporcionalista*. A raíz del movimiento de resistencia de los sectores populares en los años 70 ante la Doctrina de la Seguridad Nacional, apoyado en una teoría del poder sistémico y holístico, Waldemar de Gregori hace la propuesta de Utopía triádica para este ciclo de la humanidad. Se trata de una visión global del individuo, grupo y sociedades, una visión triádica de los seres humanos y sus agregados: el individuo es siempre *pensar, sentir y actuar*, de la misma forma que la sociedad contiene *la ciencia, el arte y la economía*, expresión de la inteligencia de sus tres cerebros. Los grupos y organizaciones muestran siempre tres subgrupos en pugna por el poder, la que puede ser creativa y no destructiva, como expresión que es de la vida misma. Heloisa informa que el Proyecto Colibrí (www.redlases.org.ar) ha adoptado y avanza sobre este modelo.

* Humberto Maturana, Francisco Varela y Fernando Flores, con su *epistemología constructivista para las ciencias y la vida cotidiana*. Esta Escuela de Santiago lanza las siguientes provocaciones:

-*No hay nada fuera de nuestras mentes: todo son interpretaciones.*

-*La obscenidad nunca está en el cuadro, sino en la mirada del Observador.*

-*Todo lo que hacemos es desde el lenguaje: somos lo que afirmamos, declaramos, pedimos, ofrecemos y prometemos.*

-*Hacer Historia es escuchar el mundo de sentido de su cultura y hacerle ofertas que revelen un mundo nuevo de sentido, reconocido como superior al anterior.*

* Bernard Lietaer y Margrit Kennedy, con *las monedas complementarias*. Lietaer propone revisar la ciencia económica desde la óptica de C.G.Jung y sus arquetipos del inconsciente

colectivo. El dinero es sin lugar a dudas un fenómeno de Psicología colectiva. Según Jung, el dinero es un campo emocional que moviliza a las personas individual o colectivamente. Jung mostró que cuando un arquetipo es reprimido, dos tipos de sombras emergen polarizándose entre sí. Si el ser superior es reprimido me comportaré como un tirano o como un cobarde. Estas dos sombras se conectan a través del miedo. Habrá que superar el miedo para corporeizar el arquetipo del Soberano. O bien, con el arquetipo de la Gran Madre, tan importante en los albores de nuestra prehistoria, tan violentamente reprimido en Occidente durante 5,000 años. Aquí las sombras son *la codicia y la escasez*. En el climax de la represión de la Gran Madre, Adam Smith asumió que dichas sombras eran el modo "normal" para operar civilizadamente. Se creó así la economía moderna, desde ese paradigma, como una manera de distribuir recursos escasos a través del mecanismo individual de *la codicia y el miedo a la escasez*... Por su parte, Margrit Kennedy vio la imposibilidad de que las curvas de crecimiento de la economía y del interés bancario se acompañaran de forma estable en la evolución de las sociedades. Su modelo Regio va teniendo cada vez más campo de discusión y soporte en experiencias localizadas en Europa (www.moneta.org).

Las redes de trueque de Argentina durante casi siete años expresaron *el paradigma de la abundancia* a través de la emisión de una moneda privada. Un grupo inicial de 23 personas practicando el trueque multirecípoco en 1995 logró reunir a 6 millones de participantes en redes por todo el país demostrando que *otro mercado era posible*... Pero la crisis circundante ganó la batalla y el paradigma de la escasez se volvió a imponer: unos pocos acumularon dinero oficial obtenido con la venta de las monedas "sociales"... Tal como ocurre con la otra moneda. Por suerte, en Brasil (Secretaría Nacional de la Economía Solidaria) se declara que esta propuesta junto con las iniciativas campesinas del Movimiento de Trabajadores Rurales sin Tierra y las experiencias autogestivas de trabajadores, son lo más relevante para la nueva economía. No debemos permitir que estas ideas sean discutidas solo por "expertos" y se pretenda ignorar el PECADO ORIGINAL de la Economía, lo que impide lanzarnos a la construcción de un nuevo modelo de sociedades plurales, más justas y equitativas.

¿Hacia donde vamos? ¿Hacia donde podemos ir?

Nos debemos el diálogo y la integración de las distintas estrategias de nuevos modelos contrahegemónicos, atentos a descubrir nuevos "pecados originales". Debemos estar alertas ante las trampas del "pensamiento único" propio de grupos cerrados e instituciones voraces, cobijadas incluso bajo la denominación de "redes".

Proposiciones a tomar en cuenta:

Las instituciones no son más que discursos hegemónicos que protegen intereses corporativos.

Las redes no existen en el mundo material. Son construcciones mentales para instituir otro poder.

Heloisa acepta el desafío de V. Forrester: "Hacer política desde los actores de la economía". El Proyecto Colibrí trabaja en varios países y aspira a montar una red de 1,500 promotores en los próximos tres años. Se trata, en cada espacio territorial, de rescatar lo cultural,

reactivar los recursos locales, emprender nuevos proyectos colectivos en producción, comercio, consumo y finanzas solidarias... Incluidas ferias donde se produce una moneda social. Es más una cuestión de *poder de imaginación* que de subsidios de ricos a pobres.

Tengamos presente que

-El poder es un juego permanente, inevitable, necesario y creativo.

-El planeta es abundancia y tiene recursos para el bien vivir de todos sus habitantes.

-Tenemos siempre responsabilidad sobre el todo y no solo por la parte que nos toca.

SOCIAL CURRENCIES

Stephen DeMeulenaere – Workshop on Money (read by Marcos Arruda)

Complementary and alternative social currencies give the power to increase the exchange of goods and services, starting from the poor and financially excluded from rural villages in the third world, to increasing geographic scales of regions, islands, provinces, countries and internationally and scales of production and trade, to major trading corporations that use internal currencies to facilitate exchange within their enterprise clusters and supply chains in order to gain a number of comparative advantages, those mainly related to increased income through the elimination of the payment of interest. Reducing and eliminating interest reduces prices, increases savings for important purchases and capitalization for the formation of micro, small and medium enterprises.

There is a wide variety of methodologies that have been implemented in order to achieve a range of specific social, cultural, economic and environmental goals. There have been some spectacular successes and equally spectacular failures and many lessons learned along the way. The incorporation of lessons learned into new methodological designs is demonstrating the ability of social currencies to take a major role in reorganizing economic systems according to a new economic paradigm that connects the other elements of SSE together, from gender awareness to solidarity finance and fair trade, ecological production and environmental justice, to corporate social responsibility and international trade regulations.

These advances have led to increased cooperation with the existing economic system and their network of national currencies. This has fostered the development of social currency systems that are capable of generating capital for new enterprises, increased multiplier effects from the circulation of currency in local development and solidarity finance/micro-finance programs, and for organizing value/supply-chains and enterprise networks and production clusters. As a result, several social currency organizations have developed advanced software for facilitating exchange using a variety of transaction mediums, from highly-secure currency notes to electronic payments by Bar Code, Swipe Card, Smart Card, Mobile Phone and RFID (Radio Frequency) cards. Further, this has led to interactions with formal financial institutions who are interested in implementing these systems to create and capture new markets, increase customer loyalty and find an entry point into the new emerging network economy.

Social currency systems share the common vision of a money system without interest, of a just relationship between the individual and collective between what is given and received, of the inclusion of all people without discrimination but based on their willingness to take initiative and make contribution to the collective, of mutual aid and support for collective advancement which results in individual gains. This vision is based upon a concept of the money system as being the single core human institution that creates the structure in which humans relate to all other activities, in other words that the money system is the core concept behind all other human institutions of governance, production, distribution, warfare, access to environmental resources, human and gender rights, etc.

This concept is based upon the psychological understanding of money by C.G. Jung and Freud, and the Buddhist philosophy of economy that money, unlike other human institutions, is a phenomenon of collective psychology of valuation, generosity and reciprocity which begins from infancy and is constructed through the child's experience in the family. Money is the expression of that experience in society throughout adulthood.

In achieving a new economic paradigm, we work to change the dominant psychological understanding which is based on a mentality of scarcity, dependence, insecurity, fear, dissatisfaction and existential unhappiness that sees only what is lacking and which is supported by the present debt-based monetary system of scarcity. A new socially-oriented monetary system supports a mentality of abundance, allowing us practically to identify, value and develop what we have, and find satisfaction in what we have that leads to happiness.

BUILDING AN SSE BASED UPON SOLIDARITY INCLUSIVE COMMUNITIES

Wim Polman (read by Heloisa Primavera)

I would like to focus on building a solidarity socioeconomy (SSE) based upon **Solidarity Inclusive Communities** of like-minded but most diverse individuals and peoples. (We as workers are bound in economic dependency at primary production, industrial and service sector level, state and private sector level with complete different but possible synergetic SSE values as multi sector, territorial based communities.) This entails developing **social capital** encompassing empowerment, by building upon recognition of *cultural diversity, suitability of local socioeconomic organizations* aiming at building organizational strength in order to be **competitive and sustainable**.

We could envisage a global society comprising a wide range of politically, economically and culturally diverse *solidarity inclusive communities* horizontally and vertically connected, through shared values, knowledge, technology and fair trade in a wider network of solidarity and inclusive relationships.

To be a credible alternative within the current world economic order, SSE communities must be sustainable with sound self-management capacities ensuring independence. This can be achieved through development of communities with suitable forms of solidarity finance and participatory, gender sensitive, pro-poor local governance. SSE communities will be recognized in their *sharing of values* aimed at enhancing a better quality of life, inclusiveness and solidarity. Activities by members in SSE communities will focus on enhancing their competitiveness in achievement of “value added” socioeconomic and cultural community development outcomes and in building sustainable fair trade networks to guarantee their self reliance.

Since there are major obstacles to building Solidarity Inclusive Communities, we should never forget to be at the same time **competitive, inspiring, efficient and responsive!** (See Vision contributions on Gender and the one on Fair Trade by Pierre Johnson which is an excellent basis for integration of core SSE concepts.)

The concept of “**abundance**” provides powerful positive value to the SSE vision and this may be combined with the concept of “**voluntarism**” in promoting value-driven (SSE) decision-making by free individuals on the use of available factors/means of production and sharing benefits to meet individual, household and wider community needs.

The concept of **Fair Trade** means moderation on the part of producers and consumers; this is understood in Asia as being “**considerate**” (which includes both the concept of solidarity and self-restraint as essential base values) as part of the mindset of individuals, leaders in SSE community level decision-making. The concept of **considerate** is a more suitable concept than moderate; more than half a billion really hungry people in Asia will otherwise not understand the key importance of the SSE vision for their own daily lives!

Another key SSE concept is **self-managed development** – since this is a multi sided complex issue (at enterprise level not always feasible, while at community level it could be). May be this concept should be combined with **self reliance** of SSE communities. Self-management at community level is well defined in case studies on alternative local solidarity finance systems (well developed in Switzerland) and now being experimented with in many other countries. Community level self-management and self-reliance in terms of equitable sharing of resources, knowledge, basic goods and services can be feasible, "competitive" and sustainable.

For an SSE worldwide to flourish we need to meet a major challenge which is identified clearly since the 1870s already, but not at all tackled with a clear vision and strategy: the strong dominance of expanding transnational financial/business monopolies, which have been effective in development of neocolonial *monopolistic control* over essential livelihood resources: access to food, health services, employment opportunities and working conditions, wage income, and quality of natural resources. There are many official, legalized ways for TNCs to limit freedom of decision making, access and ownership over resources, millions of people are excluded in a market system where there are 6,000 billionaires and 680 million vulnerable mainly rural poor and hungry people.

At local level the race for patents control of plants essential for daily and health needs and blocking the use of local knowledge related to livelihood sources, results in massive loss of human dignity and security. Yet monopolistic control is growing under the banner of International Security, Economic Scarcity and so-called Free Trade the result is emergence of unsustainable monocultures in terms of unsuitable ecological, economic and social conditions, which lead to dispossession of local producers and destruction of existing social capital within local communities and societies.

Free Trade needs to be boxed in through Fair Trade norms as expressions of solidarity in international economic collaboration and through international taxation of capital flows and commodity trade within and among transnational corporations. The income from international taxation could be used for strengthening Fair Trade within an international legal framework to ensure transparency and corporate social responsibility on the part of transnational business. Free but Fair trade would automatically put a hold on the global patent race to take control over all aspects of human life and supporting resources – food, water, plants, forests, local knowledge and management skills of women, indigenous people and small farmers.

Education and knowledge should be free for all, free from any dominant political, cultural, religious and economic bias and really provide inclusive, people-oriented life education in which local knowledge is fully integrated with relevance to SSE-adapted modern science. We need not to wait for government to act on this. Volunteer non profit social education is possible any time. I am a product of such a non profit volunteer education system built up from grassroots primary level to high school and university level. This was then built on the basis of generational struggle (about 40 years!) by rural and urban wage workers and inspired middle class members of society, sharing basic solidarity humanitarian and spiritual values. All institutions set up for education were based on a value-driven social outlook encompassing solidarity and self-responsibility in use of resources, opportunities

for wellbeing of all, including space for competitive contribution to a more just and spiritual world society. The model can be replicated everywhere to bring in all weaker sections of society into the mainstream with formal/informal inclusive education based upon values, truth and not dogma, with a focus on integrating human rights, spiritual and solidarity values and creating gender equal attitudes.

For a successful and vibrant SSE to develop we need pro-active, creative young people to lead SSE communities in development of economic, political and social alternatives to monopoly control scarcity, dehumanization and conflict. It is necessary to break down inter-age barriers in innovative ways. The exclusion of women, the elderly, ethnic minorities, disabled and migrants from decision-making/control over food/production resources is impoverishing society and the world economy at large.

Self-managed development would have built in guarantees that the vulnerable are not excluded. In my daily work among rural poor women, ethnic minority groups, landless and marginal farmers, disabled persons, I strongly promote self-management, but it is no general purpose panacea as no more than 25 to 35% individuals are really able to self-manage their livelihood. Therefore mentioning **cooperatives** and **trade unions** is extremely important.

Yet, we need to question what is wrong about these important forms of social capital? My work over 21 years in FAO is focused on supporting groups/unions of rural workers, small/marginal farmers and other rural poor through capacity building on rural enterprise development including cooperative enterprise development. There are major cooperative development issues such as lack of member education, sharing in efficient services delivery, management/business skills and women's participation in decision-making.

However, government control in partnership with large national/transnational business is often abusing cooperatives for short-term political purposes (distribution of inputs/collection of votes) or submitting them to external control of internal cooperative management. Today while SME's are often mentioned as government favorite target groups in economic development most often cooperatives are not included either in support programs for rural enterprise or in technology development, let alone in national and international decision-making on trade liberalization (WTO/FTAs).

Today legal-administrative and fiscal instruments are hindering sound local/higher level cooperative enterprise development. Yet, in health services, housing, consumer goods delivery, small-scale producer input supply and employment generation, people prefer working together as the best way and cooperative development as the most suitable community enterprise to deliver needed social and productive services. Cooperatives provide a solid base for building of sustainable Socioeconomic Solidarity and Inclusive Communities *as a human value-based concept of abundance, moderation, voluntarism, respect of human dignity and human rights.*

We should not forget to revive the role of trade unions as without them we would still be working in more exploitative conditions. But we need to look into their internal and external constraints to become strong social capital builders for SSE.

Finally, full attention should be given to strategic partnership among solidarity networks of grassroots groups, local organizations, genuine human development agencies, NGOs universities and relevant government entities, e.g. national associations of municipal and village level elected (women) council members, managers and majors and the core representative national organizations for the 800.000 cooperatives and farmers organizations currently involved in Fair Trade.

Heloisa Primavera comments:

The article is dense and relevant. Full respect for his approach. No need to compact, then.

1. From diversity that could enrich/complement his ideas, I would add:

- beyond Fair Trade, which seems to be most significant to Wim, I would add as well Ethical Consumption and Complementary Currency Systems which could integrate the three aspects of Economics: production, consumption and Trade.
- “competitiveness” hurts my ears after so many efforts to produce “cooperation”; I would rather say “pro-activeness”, “creativity” to avoid any connection with the paradigm of scarcity, in which greed and competitiveness are so close together.
- “moderation” is quite North view if you consider how many people are “starving” in South. May be it is heideggerian transparent for a Northern human being, but I would prefer “considerate” or even “responsible”
- and last but not least, “Volunteer work” would not be necessary if we could change our money system and this is for sure a crucial aspect of SSE.

ECONOMIA SOLIDARIA, HACIA UNA NUEVA CIVILIZACION EN EL MUNDO, EN EL PERU, EN LAS COMUNIDADES

Humberto Ortiz Roca (read by Claudia Danani)

LA SITUACION ACTUAL

El mundo hoy, a inicios del nuevo Milenio.

Se ha extendido internacionalmente la preocupación por la viabilidad de una economía sostenible de cara a este milenio. Los relativos éxitos de corto plazo alcanzados por los programas de ajuste estructural, como moderadas tasas de crecimiento, son inviables en el mediano y largo plazos, pues han venido acompañados de un alarmante avance del desempleo y subempleo, de crisis de la Seguridad Social, de exclusión de millones personas y de expectativas crecientemente negativas para la juventud.

La injusticia y el malestar social nos interpelan cada vez más profundamente y señalan una de las mayores crisis del neoliberalismo. No hay alternativas técnicamente viables, y menos éticamente aceptables, para las enormes desigualdades entre el Norte y el Sur y las que se dan en su interior. Debemos admitir que no habrá un nuevo orden global sin una nueva ética y si no somos responsables de la creación de un orden global justo y solidario. Un orden que no puede ser creado ni mantenido sólo a base de leyes y convenios, ni tampoco mediante visiones meramente "economicistas" del desarrollo.

Más que nunca, hoy se ve con fuerza la necesidad de un desarrollo humano integral y sostenible. Edificar la paz, la justicia y el equilibrio ecológico exige conciencia de nuestra responsabilidad por lo que pasa en el mundo, y convicción para actuar con Justicia.

La visión del PNUD.

Ya desde 1992, con el Informe del PNUD sobre "Desarrollo Humano" y con la declaración de las Metas del Milenio, vienen planteándose los siguientes principales problemas a resolver dentro de ese nuevo orden internacional a construir:

* La desigualdad entre países del Norte y del Sur, sea ella referida a:

- los ingresos, tecnología e investigación, sistemas de información y escolaridad;
- la concentración de la inversión directa extranjera y de los flujos de capitales, incluso entre países del sur.
- sus condiciones de vida y su participación en el PBI, el comercio mundial, préstamos comerciales, ahorro e inversión internos. Las regiones más postergadas son el África Subsahariana y el Sur de Asia, cuya participación en la población mundial creció del 27 al 32 % entre 1960-1989, pero en el PBI y en el comercio mundial se redujo más de la mitad.
- el poder de negociación, por la condena de los países pobres a la exportación de materias primas, y por el peso de la especulación financiera. Ello reaviva el

mecanismo de la deuda de esos países, y revela que los mercados globales no operan libremente.

* La comunidad mundial precisa de políticas nuevas, basadas en un nuevo **pacto internacional** para vencer la pobreza y la exclusión social a escala planetaria, y para el cual las personas sean “la prioridad del desarrollo” en un mundo pacífico y seguro. Ha de generarse una red de seguridad social para las naciones pobres y la gente pobre y excluida, que atienda los problemas de desempleo y subempleo creciente y de vulnerabilidad por desplazamiento de migrantes y refugiados. Deben establecerse claramente las metas humanas a alcanzar: educación básica universal para mujeres y hombres, atención médica primaria y agua potable para todos, eliminación de la desnutrición severa, y un nuevo marco institucional. "El destino de la humanidad es una opción, no un azar".

LA ECONOMIA SOLIDARIA SE CONSTRUYE

Hay signos esperanzadores a favor de ese nuevo orden mundial, con importantes experiencias de economía solidaria que en los últimos años merecen ser tenidas en cuenta. Tanto en el Norte como en el Sur del Mundo, ellas empezaron en condiciones muy precarias e incluso ligadas a situaciones de pobreza extrema, pero en muchos casos constituyeron luego movimientos fuertes, con sólidas identidades. Las Cajas de Ahorro son un ejemplo a nivel mundial, aunque en ocasiones perdieran sus rasgos iniciales, asimilando los valores del neoliberalismo.

En los países del sur, la cooperación, la autogestión y la participación ciudadana son elementos importantes de los intentos por desarrollar una lógica diferente a la del neoliberalismo, pero cuyo potencial de articulación está aún pendiente. Un proyecto de desarrollo humano integral implica tanto compartir visiones sobre el contexto y ensayar negocios concretos de mutuo beneficio, en los que se trace una línea ética para la producción y el comercio y se cultive una creciente igualdad. Compartir los beneficios de todo tipo debe ser su consigna y el comportamiento ético, su marca de identidad.

Entendemos por economía solidaria las diversas formas como las personas de sectores urbanos o rurales se organizan para crear sus propias fuentes de trabajo o para acceder a bienes y servicios básicos a los menores costos posibles pero con calidad, en base al apoyo mutuo, conjugando lo individual y lo colectivo y en cuyas prácticas cultivan y desarrollan, a diversos grados, el valor de la solidaridad.

La economía solidaria no es una "isla" ni se limita a los esfuerzos en el campo popular o campesino. En sentido más general, se expresa en formas justas de cooperación, pues el éxito de toda empresa depende de un sinnúmero de personas y grupos, cuyos aportes e intereses deben considerarse y transformarse en estrategias a la vez flexibles y eficientes para las demandas del cambiante ambiente comercial. Por ello, un proyecto mayor de economía solidaria es una estrategia que incluye al conjunto de actores económicos y sociales de una localidad, región, país e inclusive a nivel internacional.

El carácter inclusivo de la economía solidaria alcanza al mundo de la empresa privada tradicional, no sólo estimulando la solidaridad sino favoreciendo oportunidades para los

empresarios que no están en las mejores posiciones en el mercado. Ello hace a la sostenibilidad tanto de un proyecto mayor de economía solidaria como de una economía nacional e internacional basada en una nueva ética de hacer economía, empresa y gestar desarrollo.

A nivel internacional, incluimos en la economía solidaria a empresas autogestionarias de los países del norte y del sur, sus redes y diversos grados de articulación local y regional, la solidaridad de entidades empresariales, sin fines de lucro y de los propios Estados de los países del Norte con los estados y organizaciones de base de los países del sur para promover un desarrollo integral, solidario y sustentable. Donde fuere, se trata de ligar lo económico con lo social, lo económico con lo ético, lo económico con lo político, a veces no visualizado en toda plenitud a nivel mundial por no existir una red suficientemente aglutinante.

Se trata de experiencias como los colectivos de economía social en Québec (Canadá), Francia y Bélgica, Movimiento de Cajas Populares de Ahorro y Crédito Des Jardins (Québec), BancoSol de Bolivia, Fundación Social de Colombia, la Red Latinoamericana de Comercio Comunitario (RELACC), la Central Latinoamericana de Cooperativas de Trabajadores, el movimiento de Centros de Mujeres de Québec, los movimientos de Desarrollo local en Malí y Senegal, los comedores autogestionarios y asociaciones de microempresarios de Perú, los "Comprando Juntos" y Cooperativa Liberación de Chile, organizaciones comunitarias de los EE UU, etc, etc.

A esas experiencias se agregan conjuntos de organizaciones sin fin lucrativo que trabajan por el desarrollo social, también académicos del norte y sur y grupos de la iglesia y confesiones religiosas que en el último siglo y medio acompañaron desde sus inicios estas experiencias a nivel mundial. Son ejemplos las Cooperativas de Mondragón en el país Vasco, que hoy ocupa a más de 50,000 personas. O la de la importante red de Cajas Populares de Canadá, que actualmente captan el 50 % del ahorro nacional.

Lo que unifica a estas experiencias es su inicio desde lo local, el eslabonamiento de pequeñas empresas y una práctica ética y educación en valores. Sin embargo, en ciertos casos los valores se han dejado de lado, lo que nos enseña que la formación ética es clave en el proyecto estratégico de forjar una economía solidaria a escala mundial, pues es portadora de otra lógica de la del neoliberalismo: ayuda mutua, desarrollo integral del ser humano y relación armoniosa entre él y la naturaleza. Eso le permite "hermanarse" con otros "modelos", como los de los llamados grupos étnicos, nativos o indígenas.

LA ECONOMIA SOLIDARIA EN EL PERU

Como a nivel mundial, la economía solidaria en el Perú surge a partir de la Economía Popular: el punto de partida fueron intentos del pueblo pobre por sobrevivir y mejorar sus condiciones de vida en base al apoyo mutuo, creando organizaciones de economía solidaria que combinan creativamente lo individual y lo colectivo en los sectores productivo (pequeñas y microindustrias, empresas autogestionarias), de comercio (pequeños comerciantes, vendedores ambulantes), de servicios (talleres de reparación, fondos rotatorios, cajas de ahorro y crédito) o de "consumo" (comedores autogestionarios, clubes

de madres, comités de salud, asociaciones por la vivienda, etc.).

Es cierto que estas experiencias son heterogéneas y que no se han superado del todo la competencia y el individualismo, pero aún así el apoyo mutuo sigue siendo constante en la búsqueda de objetivos inalcanzables individualmente. El “grado efectivo de solidaridad” es dispar, pero en la práctica se da un camino y una estrategia solidaria.

Magnitud y organización de la economía solidaria en el Perú.

* Organizaciones de consumo: hay en Lima cerca de 4.000 comedores populares autogestionarios, y casi 10.000 a nivel nacional, y existe una Federación de Comedores autogestionarios de Lima y Callao, que involucran a más de 250.000 mujeres. También una Confederación Nacional.

* El Censo Económico de 1993 contabilizó 3 millones de empresas. El 80 % de ellas son microempresas y empresas artesanales con menos de 5 trabajadores. A nivel local se crearon asociaciones de las micro y pequeñas empresa y cámaras de comercio y producción. También los vendedores ambulantes, que sólo en Lima sobrepasan el millón, organizaron Federaciones locales. Ello muestra el potencial de generación de empleo, si se agregan las experiencias de eslabonamiento interempresarial o de inventiva en el campo tecnológico.

* Sin embargo, persisten problemas relacionados con su participación en el mercado, la consiguiente reducida participación en el Ingreso Nacional y lo difícil de administrar sus pequeños negocios. Aunque las microempresas y actividades artesanales dan trabajo al 75% de la PEA, sólo participan en el 30% del Ingreso Nacional, sólo un 20% de estas actividades acumulan económicamente mientras que un 80% están en sobrevivencia o subsistencia.

Participación económica y política.

Continúa el reto de aumentar la participación en la economía y en las decisiones políticas de los actores de la economía solidaria.

La mayor presencia en el mercado nacional e internacional sigue siendo de grupos económicos oligopólicos, nacionales o transnacionales. Pero lo concreto es que ni generan nuevos puestos de trabajo, ni establecen intercambios económicos con micro y pequeñas empresas locales. Prefieren adquirir insumos y partes también del extranjero por menores costos. Y en convenios de producción con el Estado, los gremios de la gran empresa captan los contratos para luego seleccionar a las microempresas que puedan participar, siendo escasa la vinculación de asociaciones y gremios de las empresas populares con el Gobierno Central.

Los gobiernos locales son cada vez más proclives a promover las actividades económicas locales, pero existe una tensión entre ver a estos nuevos actores económicos sólo como "contribuyentes del fisco" o como actores de un nuevo desarrollo integral local solidario.

Articulación económica y política desde los espacios locales y regionales.

Es necesario proponer caminos nuevos desde las economías locales y regionales que se articulen crecientemente y generen un nuevo proceso de desarrollo. En cada distrito, provincia o región es posible trazar una estrategia que potencie circuitos de intercambio desde la economía solidaria, entre los distintos sectores económicos, entidades locales de tecnología (CEOs, Tecnológicos, Universidades) y los gobiernos locales y regionales. Ejemplo de ello serían los siguientes programas:

- * De ahorro y crédito desde entidades autogestionarias locales para el intercambio entre productores, comerciantes y consumidores locales, dirigidos a microempresas o consumo.
- * De parques industriales/artesanales o maquicentros, canastas alimentarias y de medicinas locales, centros de acopio y distribución.
- * De mejoramiento de tecnologías locales y capacitación en gestión empresarial.
- * De mejoramiento de rentas municipales y de inversiones municipales locales.
- * De promoción a las exportaciones desde las cámaras de comercio e industrias locales o de apoyo a la "formalización paulatina" e información de mercado desde los gobiernos locales, generando un circuito intersectorial desde lo local: *producción-comercio-servicios-consumo-entidades financieras-entidades tecnológicas-gobierno local*.

La estrategia central ha de ser la optimización de ventajas comparativas y competitivas, el impulso al financiamiento autogestionario y desarrollo tecnológico, la cogestión de programas de desarrollo con los gobiernos locales. Y, sobre todo, la forja de una identidad ética y política. Será muy importante promover los eslabonamientos e interacción incluso con empresas privadas dispuestas a practicar la responsabilidad social empresarial, para retener recursos financieros y excedentes locales. Los instrumentos para lograr esto han de ser los planes integrales de Desarrollo local y regional articulados, negociados, concertados, presupuestos participativos. Se trata, así, de construir factores de un nuevo poder de decisión y acción local y regional.

GLOBALIZAR LA SOLIDARIDAD.

Se trata de plantear e iniciar el camino de la construcción de un gran proyecto nacional e internacional de solidaridad, cuya base económica sea dicha economía solidaria dentro del esfuerzo por construir en este milenio una nueva civilización desde las experiencias locales.

El camino es la potenciación de las experiencias solidarias, la vinculación estructurada y estratégica con los diversos grupos de solidaridad de los países del norte y del sur, y la vinculación de experiencias de economía solidaria no sólo en términos de intercambio de experiencias sino de negocios concretos de mutuo beneficio. Se trata pues de un proyecto de largo plazo, pero que se basa en experiencias ya existentes que deben articularse, frente a un modelo neoliberal que genera diásporas cada vez mayores y que pasará a la historia

por las grandes magnitudes de pobreza, exclusión social y violencia que ha generado.

Retos para la Globalización de la Solidaridad

Los desafíos concretos para la construcción de un nuevo orden son:

* POTENCIAR LOS MOVIMIENTOS SOLIDARIOS, retomando y actualizando sus valores fundacionales.

* CREAR UNA AUTENTICA RED QUE ARTICULE LA GLOBALIZACION DE LA SOLIDARIDAD, y que utilice los recursos de los estados industrializados, para invertir el flujo de la corriente económica en favor del desarrollo humano.

Se trata de potenciar los dos componentes que integran esta red solidaria: por un lado el valor moral que representa la propia solidaridad, el compartir y ligarse unos con otros, situando como centro a la persona humana y dejando a la economía en su verdadero lugar de medio y no de fin en sí misma; y, por otro lado, el componente económico, poco trabajado hasta el momento, que debería centrarse en la idea de generar un sistema económico diferente de eslabonamiento norte/sur, en base a las experiencias ya existentes de viabilidad de negocios y a un nuevo paradigma de organizar una economía al servicio de las personas.

En definitiva, lo que se propugna es añadir a la solidaridad ética que ha existido en los últimos años, la solidaridad económica en el plano de los negocios, pero negocios que se den en un marco de equidad, que a la larga lleguen a cuestionar la asimetría actual de los flujos económicos. Si así lo hacemos, aportaremos y avanzaremos en un camino novedoso de democratización de la economía y sociedad, que implicará la transformación del Mercado y del Estado y la construcción de una nueva ética, de un nuevo paradigma del desarrollo.

En definitiva, un nuevo orden mundial... hacia una Nueva Civilización.

Lima, julio de 2005.

SCARCITY, ABUNDANCE, AND MODERATION

Pierre Johnson (read by Marcos Arruda)

Fair Trade Workshop – Contribution to the Vision Workshop

There is enough in the world for everyone's need; there is not enough for everyone's greed.
Mahatma Gandhi

Capitalism is built on a strong assumption of scarcity. For the neoclassic economists, the economy is the management of scarce goods. The modern institution of the market puts in relation the offer and the demand of scarce goods. According to the neoclassic theory, this results automatically in the fixation of a price for that good, expressed in a universal currency. The assumption behind this affirmation is the *homo economicus*, a model of human behaviour endowed with perfect rationality, self-interest and knowledge. Economists perceive the self-interest of *homo economicus* through the accumulation of material wealth, which is perceived in our societies dominantly as the aim of individual and collective development.

A simple answer to this construction is that we can demonstrate for a number of reasons that the self-regulating power of the market is an illusion. The most obvious reasons are the unequal access to information, and above all the fact that the adjustment of production to the market can't be instantaneous, but requires individual or collective planning. In *reality*, the market economy and market *society* (the reduction of all interests to individual and material interest) have created ever growing and powerful monopolies, as well as an extreme concentration of wealth for a few, within each nation and among nations. There is also the fact that natural resources, though abundant, are not unlimited, but are not accounted for in classical economic theory.

Capitalism has resulted in a sustained growth of the production of industrial goods and services over more than two centuries, which led to excess of production in certain areas (for example agricultural production in countries of the North), while depleting social and natural resources in others. It is the concentration of wealth that has created the need to reinvest capital in production, thus resulting in recurrent cycles of overproduction. It is a paradox that it needs to create artificial scarcity while creating wealth, in order to continue to grow.

Scarcity is the reflection of the anthropological assumption of the *homo economicus*. Nature teaches us that not everything is scarce. Isn't life abundant on earth (before man destroys it)? Species and human cultures are not scarce, but abundant. Natural resources, such as water, the air, solar energy, are abundant, and perhaps only erratically distributed. The basic needs for human development can be fulfilled by a limited amount of resources, which are already existent for all today, though not socially available. In many cases the problem of society is not scarcity of goods, but their lack of availability and their unfair distribution.

Solidarity socioeconomy has a different definition of the economy, which goes back to the original meaning of the word. It considers the economy as the management and care of the

home, considering the dweller as the human community, and the hearth as the planet and our societies, which are part of it. Moderation, consciousness and creativity are qualities useful for the management of the home, which is not the case of greed and the pursuit of ego of the *homo economicus*.

The economy is not an external and mechanical force, as described for decades by “economic sciences”, but we are part to it, as subjects, and its forces should rather be seen as bio-anthropological (biological and anthropological). Concretely, this means there is no need to fear scarcity, as long as we, as community and collective individuals, work with natural forces, including our own, and not against it. This includes the respect of time cycles, of our social (and not only individual needs), and a consciousness that moderation favours human development.

Capitalism tends to mistake development with growth. According to Schumpeter, growth is to produce more, development to produce better. According to solidarity socioeconomy, the aim of the economy is not primarily material growth; it is well-being and human development for all. Human development needs a limited material base, beyond which it is mainly an expression of immaterial forces, like social links, education, fulfilment of individual and collective rights knowledge and culture, which can also be seen as a spiritual force (H. Bergson). These forces don't obey to the logic of material development, because immaterial goods get multiplied through sharing.

In considering all goods on the model of industrial goods, which are scarce because they are the material and elaborate product of aggregated human activity, modern economy is expanding market mechanisms beyond its natural sphere. Above all, the pervasive tendency of the market to invade all aspects of life tends to have negative effects on human society and the environment.

The market may be adapted to goods and services that owe their existence to human ingenuity and that have to be divided when shared (primarily industrial goods). This market should be regulated, and even a number of private companies are acknowledging that cooperation should be blended with competition for it to be socially and economically efficient.

Some natural goods, such as the atmosphere or the ocean, can't be divided. They can't be subject to the market, but should be collectively managed as common goods. Other natural resources can be divided when shared (land). Because they are a product of nature, their distribution should be guided by social justice rather than by market forces.

Knowledge and social capital (the ability of people to cooperate and act together) can't be treated as industrial goods either. These are goods that multiply when shared, building a strong case for an economy of abundance. When you share knowledge, love or the capacity to cooperate, you reinforce them, instead of reducing them. The notion that helps us understand the behaviour of those goods is that of mutual benefit. Their abundance is only limited by our capacity of sharing among ourselves (humans) and ultimately with the rest of the biosphere.

One of the main expressions of scarcity in the market economy is the scarcity of money. More and more essential goods and services, even those that should be dealt with through redistribution, collective management, or mutual benefit, are only available on a market basis, increasing the feeling of scarcity. But we have been taught that anything can be bought if we put the sufficient price. Thus, what is encouraged is not good collective management through the building and expression of social links, but the accumulation of symbolic (monetary) wealth by individuals in order to be able to buy on the market.

Socioeconomic innovations like social money, social finance, or participatory budgeting have an educating power for the building of a new society, as they prove that with different socioeconomic mechanisms it is possible to build self-sufficient (not autarchic) communities with strong social capital and human wealth. These mechanisms tend to favor social links and cooperation, while capitalism favors competition, greed, the concentration of wealth, and social insecurity.

A society base on solidarity socioeconomy will promote the value of sharing instead of scarcity, and follow local and global principles and regulations, such as collective management of common goods, participatory socioeconomic planning and political participation. Sharing is an activity that unfolds human and natural potential. The management of resources in SES are closely related to the spiritual values of SES.

Respective values and concepts	
Capitalism	Solidarity Socioeconomy
Scarcity	Sufficiency
Greed	Moderation, temperance, co-responsibility
Market regulations for all goods	Different types of regulations
Result : Individual accumulation	Result : Sharing and collective management
Competition as dominant behavior	Co-operation as dominant behavior
Unlimited material needs	Basic needs as material threshold
Immaterial needs treated as material needs	Immaterial and spiritual needs
The aim : Material Growth	The aim : Human development
The individual as a separate entity (monad)	The collective individual, related to society and nature

Sources :

International regulations in the context of Solidarity Socioeconomy, Marcos Arruda; for the global framework on development.

Principles of governance in the 21st century, Pierre Calame, FPH; for the definition of 4 categories of goods.

FAIR TRADE (WITHIN SES), GLOBAL AND LOCAL

Pierre Johnson (read by Wim Polman)

Fair Trade Workshop – Contribution to the Vision Workshop

Free trade is a negative utopia

Trade, defined as the exchange of goods and services, generally through the means of a universal currency, is almost as old as humanity. Yet for most (mainly rural) societies it was secondary to the bigger goal of fulfilling human needs, involving work and all type of exchanges, of which trade was only a small part. Today, trade has become a main criterion for standard setting for the value of goods and services. Governments and companies seem to consider trade, in particular international trade, as the ultimate value and engine for what they call “development”. This they justify with a concept of the market with free competition working as an “invisible hand” automatically balancing offer and demand through pricing, determined by the comparative advantage of local producers communities, regions and countries. Yet, market conditions for “free trade” competition are distorted.

Corporations use natural resources without having to pay for their production and reproduction, while consumers are ill-informed about products and their social and environmental consequences. As a result, “free trade”, also known as “conventional trade” concentrates wealth among a very few rich while increasing poverty and vulnerability of the poorest. The case of commodity price setting on international markets is illustrative, as these do not reflect local production and living costs, but are set by international trading companies at a few international commodity markets. In fact big companies have been subsidized, indirectly by local producers, nature and government policies for production and distribution of standardized and industrialized goods, often displacing local producers, weakening regional economies, and creating livelihood insecurity in local communities. These standardized products are often poor in terms of cultural and nutritive quality.

Trade in Solidarity Socio-Economy (SSE)

In a solidarity socio-economy, the trading of goods on the market is an integral part of a multitude of exchanges, of symbols (communication and culture), energy and matter flows between human beings, and the biosphere. SSE considers that building of human linkages or social capital, is equally or even more important than accumulation of material goods and capital. SSE places the highest value on the fulfilment of human needs as the essential aim of social development. It asserts people’s right to food sovereignty against corporate-driven food production, often ecologically and culturally non sustainable. Trade in the SSE vision, like the concept of good governance, should be based upon the principle of subsidiarity, while it has to be re-embedded in the broader framework of social and natural exchanges. A balance needs to be established between the right to trade and the basic human rights of the individual, society and the environment to self-subsistence.

Innovations and local and regional levels

Currently, genuine innovations in trade are not originating from governments or international institutions, but from solidarity economy groups. Local Exchanges and Trading Schemes, social currencies and occasionally, buyers' cooperatives, reinforce the capacity of local groups or communities to fulfil their own needs, limiting the need for (official) hard currencies, which are the tools of "liberalized trade" used by big and global companies to compete with local producers and companies. Social finance and local investor groups also contribute to the reinforcement of local economies. While the first group of innovations organize trade differently and directly at a local level, the second has an impact through savings, credit and investment, and indirectly on trade flows. Yet, in most cases local producers and consumers are forced, often by poverty and dependency to import unfairly subsidized goods, thereby participating in a destructive circle of globalized trade.

Strategies to induce changes at national and international levels

Changes towards a socio-economy of solidarity require changes in laws and regulations at national and international levels. As legal changes often follow changes in practices, the role of Fair Trade and Corporate Social Responsibility is of key importance in bringing about those necessary changes.

As an international movement, Fair Trade promotes "trading partnerships, based on dialogue, transparency and respect, seeking greater equity in international trade. It contributes to sustainable development by offering better trading conditions to and securing the rights of marginalized producers and workers – especially in the South". Though its 30 years of existence, Fair Trade has set up standards and principles¹ which take into account social, economic, cultural and environmental dimensions and could serve as policy guidelines for changing national and international regulations. Increasing pressure from consumer campaigns is forcing private companies to accept Corporate Social Responsibility (CSR). What is needed is that Fair Trade also serves domestic markets, complementary to existing South-North chains. Fair Trade needs to be integrated with other SSE initiatives, such as establishment of consumer cooperatives, social finance, local and or regional currencies building integrated people's economy chains.

Conclusions

Free trade is part of an unrealistic ideology as it does not take into account real world human relationships. SSE considers that trade should be part of the entire process of social and human development, building linkages between individuals, communities and between them and nature. A strategy for change towards development of a solidarity socio economy based upon all types of exchanges respecting the human being and nature, should address the need for major political changes to reduce individual dependency upon trade and transform it into a tool for serving individual and peoples rights.

Governance and Solidarity Socio-Economy

Pierre Johnson (read by Marcos Arruda)

Governance is today a buzz word which expresses the need for changes in existing ways of managing institutions and relations between people and with nature. Some corporations and public institutions use it void of its political and social implications. Solidarity economy differs from corporations, multilateral institutions and other bureaucratic institutions as it does not consider governance as an abstract set of rules, which hides in reality economic differences and power relationships, be as a set of socially agreed rules and procedures that are discussed and shared by people at different scales, with the objective of regulating the exchanges between people, societies and the ecosystems. Those regulations rely on a common vision shared by the group concerning the human and social needs of its members, and the limits imposed by nature and the biosphere on them.

From a solidarity socio-economy point of view, governance and socio-economy are closely related. If economy is “the art of caring for or managing our common house”, governance can be defined as “the art of managing interdependencies in a peaceful manner”. Our “common house” is a complex living web of relations between people, societies, and ecosystems, which should obey to commonly agreed rules and principles in order to ensure its sustainability. Those rules form a kind of regulatory system for human society, which should be designed and implemented by society itself in order to ensure its dynamic stability and adaptability. Corporations and multilateral institutions on the contrary often consider segments of our common house separately, and label as “governance” what are simply practices of sound internal management of companies or institutions. Solidarity socio-economy considers our society, its socio-economy as well as its rules as a whole, not an aggregation of partial rules, such as corporate governance, political governance, multilateral governance, etc. It aims at building a common vision of the regulations to implement, and in order to do so, seeks to agree on certain principles.

Principles for governance are valid at different scales. The Governance and Citizenship workgroup of the Alliance has done a work on those principles, which we have adapted and partly modified to take into consideration the experience, debates and values of the WSSE. The first part of this paper suggests principles for SSE governance.

I. SSE governance principles

1. Governance is based on a land-based approach and on the principle of active subsidiarity.

By land-based, we mean that governance applies to communities rooted in their territories. SSE does not consider the economy or human communities as independent from other living organisms. Human communities and their natural environment are linked through relationships of mutual interdependence. Local territories are the level where relationships based on solidarity and sustainability between people and ecosystems should start to be built.

Active subsidiarity is a basic principle of SSE and governance. It means that economic and political action should be exerted at the lowest level possible, and that each specific community has the autonomy as well as the responsibility to develop the best responses for its local challenges. Active subsidiarity is a principle that helps defining the relationships between different various levels of governance (local, national, regional, global...), i.e. scale articulation.

2. Governance means communities established at different scales ranging from local to global reflect social, cultural and economic diversity. It suggests organising the co-operation and synergy between actors.

As the art of managing diversity, governance deals with diversity not only of nations and cultures, in the classical sense, but also of socio-economic practices, between for instance corporations, local companies, and community initiatives. Socio-economic governance means that human communities must find ways to have those different styles of practicing the economy live together. The common principles which indicate the way are: seeking for mutual development and common interest, having cooperation prevailing over competition...

Beyond this cultural and practical diversity, communities can acquire a sense of collective purpose through adequate political practices which promote dialogue and partnerships between actors. Sustainable communities are those that have managed to involve all the community's players in a common project. The players than can promote these are: solidarity economy activists, political activists, and progressive public authorities.

3. Governance helps defining rules for the economy and gives a framework to the market

The market, in its contemporary meaning, is just one means of operation for the economy. Through governance, communities and their political authorities establish appropriate and differentiated rules for different types of exchanges, goods and services. They ensure that these rules allow the fulfilment of basic needs for all. Essential public goods should obey for example to different modes of operation than superfluous goods, knowledge can not be treated as private property, etc. Wherever possible and applicable, cooperative management of goods should be privileged over private appropriation.

4. Governance is based on a universal ethic of responsibility and solidarity

The destiny of humanity is interwoven with that of the biosphere, and that of our societies with each other. These interdependencies call for a new definition of responsibility and a redefinition of the social contract. Socio-economy of solidarity simply considers that each individual and human community has a responsibility for its actions, proportionate to its power, and must enact for the protection of society and the environment.

Solidarity simply means that we people have a community of destiny between ourselves and with the environment. Thus, dialogue and cooperation is always a better

answer than individualism and competition. A Charter of Socio-Economic Responsibilities could be discussed to express this ethic in concrete principles.

5. The action of public authorities should be reformed to be more participative and transparent

The current crisis of public governance is closely linked to the crisis of the “representative democracy” and its incapacity to regain control over the market. Public authorities should gain back the hand over public decisions, and regain independence over private lobbies. The State must be democratized. The cycle of public policies should obey to the natural rhythm of social and natural processes, and not to the imperatives of private shareholders. The only way to gain back this power is through the involvement of civil society bodies and the population. The current systems of “checks and balances” should be reviewed to answer effectively to the common goals.

6. Through sound governance, societies should regain sustainable relationships between themselves and with the biosphere

Currently, more importance is given to the monitoring and maximization of financial flows than the material and energy flows that ensure or not sustainability in the relationships between societies and the biosphere. Appropriate system of indicators will help human societies monitor and inflect those flows towards sustainable and satisfactory levels.

New indicators will also allow societies to measure their “genuine progress”, “social capital” and other aggregates more meaningful of human progress and well being than the current economic and financial aggregates.

7. Sound governance also means societies gain control over their evolution through time

In the present situation, neither society nor public authorities have control over their evolution through time. Short term imperatives, dictated by competition in the economy, dominate all actions. Societies should regain control over their evolution. Public action can no more follow the principles of rigid planification. In order to conduct long-term strategies, planification should be participative and flexible, as well as focusing on the essentials. It should also be prospective, anticipating and preparing transformations by conducting necessary structural, cultural and institutional changes. Common values and a shared horizon are essential to its operation by public authorities in association with society.

II. Local governance: from domination to autonomy in solidarity

In the current situation, the global economy drains out local resources and capacities. However, local communities are the appropriate space where sustainability can find a meaning for the people and their environment, where new regulations, both public and private, express themselves in concrete and immediate aims of sustainability and

autonomy. The local level is a space for cooperation and integration of activities, but those need to be facilitated by an appropriate governance.

The new vision of governance is based on active subsidiarity, the synergy of local SSE initiatives with political innovations and participative local democracy. All those practices will allow communities to regain control over their destiny. Local currencies, proximity services are helping to maximize internal flows, while participate democracy helps communities regain political authority and sovereignty on their human and natural resources. Local governance also means local authorities should implement new sets of indicators to evaluate social and ecological sustainability.

Local communities will exert solidarity between them through balanced exchanges, cooperation and fair trade. They will be organized in solidarity networks.

III. Legitimacy of governance at national level: a new vision for the State

The reform of governance at the national level is strategic from different points of view, mainly because through the notion of “sovereignty” (inherited from monarchy) the Nation-State is still widely considered as a sacred entity, which blocks necessary structural reforms.

But reforming the State and its policies is a precondition for the global emergence of sustainable communities. Today, the main actors of influence over public decisions are national and international lobbies of major companies, World Trade Organization directives worldwide, and in the South decisions imposed by international financial institutions. The difficulties that public authorities encounter in reacting to the current challenges are also the expression of a crisis of governance and public action. Even the way decentralization has been managed seems in many cases not adapted to those challenges.

The current crisis of public action is quite widely a crisis of legitimacy of representative democracy. Recent innovations in the political field rely on the assumption of the relativity of State sovereignty and of representative democracy. In those innovations, citizen participation in public authorities and administration at all level is enhanced. The Participatory Budget of the city of Porto Alegre (Brazil), one of the best known examples of socio-political innovation, is also related to local economic policies. The State should become more of a facilitator than a planner and bureaucracy. It will become a partner of solidarity initiatives and private (individual) initiatives, on a levelled ground. It will facilitate the building of economic chains build on solidarity, be it between SSE initiatives only, with the State, or with private initiatives.

The reform of governance at national level implies redefining the principles for public action. From a socio-economy of solidarity point of view, the State is an adequate level for regulation of the economy, which shared control and planning between different kinds of actors: public, private and civil society. How the principles of legitimate and participative governance expressed above give way to specific policies is still to be experienced. There is a lack of experience at this level, which can be overcome by developing participative

research on sustainable policies. Ecological think tanks in the North and the South have already brought up some major strategic lines for the reform of public policies aiming at sustainability, which can be adopted by the advocates of a socio-economy of solidarity.

- Taxation should be reformed to reflect real environmental and social costs. This taxation reform goes in the same direction as a sound management of our “common house”. Existing studies point out that ecological taxation will bring about more employment and greater protection of the environment. Integrating social aspects in environmental taxation will go in the same direction.
- Social fairness and social security can be simplified through the definition of a minimum living wage. This wage simply illustrates two facts: the global interdependency between people, and the level of productivity already achieved by Humanity, which makes us produce high above basic needs for all. This means that current social inequalities and the spreading of misery are just the expression of an income distribution problem, and of the lack of solidarity, not of the production of wealth.
- Sets of new indicators replacing or complementing the archaic GNP will be on the dashboard of public authorities and communities, and help them measure their progress of their constituencies and policies in the different dimensions of sustainability (social, economic, environmental...). Education, health and culture, for instance, will be viewed as long-term investments contributing to sustainability.

To those items of public policies, solidarity economy can add the following:

- Reorganizing finance for the common good, as an immediate corollary of the above. Today finance mainly serves finance, and money circulates unproductively in financial circuits. It is necessary to place finance under the custody of public authorities, and to manage it as a common good.
- Authorizing the circulation of a variety of currencies, under social control, operating at several levels (local, regional, national), will serve as an instrument of economic active subsidiarity, and enhance community initiatives and participation.
- Aiming at well being and a balanced state of material and immaterial production, rather than simple economic or financial growth, will help Humanity find the path to sustainability, solidarity and cooperation. This means not only favouring a “dematerialization” of the economy, but also defining, as human communities, new goals and values. The State is the ideal level to implement a new vision of wealth, based on sustainable livelihood and well-being. It can express and operate it precisely through new systems of national accounting, new indicators and aggregates.

Partnerships should be set up between players in the economic and the political sphere, in order to discuss and elaborate policies that are adequate and adapted to the different national contexts, and guide their evolution through time. Solidarity socio-economy

initiatives can contribute with its own research and conclusions to the definition of those policies, along with research centres and policy makers.

The regional level: culture, economy and solidarity

Regional communities are intermediary bodies between the national and the global levels. Solidarity and complementarities between nations express themselves worldwide, but also regionally. Nations that are close to each others usually share issues, cultures and sometimes conflicts. So it seems urgent that democratic and participative regional communities be established worldwide.

Current regional spaces (European Union, etc.) should be reformed to be democratic, cooperative and follow the rules of legitimate governance. Information and communication technologies already allow the existence of permanent public spaces for exchange and debate, beyond language and cultural barriers. Those tools should be used at national, regional and global levels to promote citizen participation and contribution to a legitimate global governance.

IV. Global governance: going beyond the fascination for trade and finance

Even though the economy and Humanity's major challenges have turned global, no legitimate mechanisms of global governance have been set up. There is a deep crisis of legitimacy and efficiency of the existing regulation bodies, the most powerful of which deal with financial and trade policies. For many actors, and in the view of SSE, those institutions, namely the International Monetary Fund, the World Bank and the World Trade Organization have bypassed their legitimate mandates. They now tend to regulate all aspects of human activities, without any ecological and social balance or consideration. Institutions which represent the other aspects of common well-being, such as the environment, security, common goods or culture, are not endowed with any compulsory power.

Many actors agree on the necessity to define and build a new and legitimate system of global governance, which would respond to all the major challenges facing Humanity and allow democratic regulations at all levels. In fact, this system of global governance should be built on the same principles than other levels: active subsidiarity, organising the co-operation and synergy between actors, defining the rules for the economy, participation, transparency and accountability.

One important strategy to reform global governance is to reinforce at global level the networking and articulation between economic practices based on cooperation and solidarity. Local and national financial systems and currencies should at some point gain the necessary momentum and cohesion to build an International Solidarity Finance System, which would be a step towards the reform of the current international financial system. By International Solidarity Finance System we mean the international federation and articulation of national and local solidarity finance systems. Fair Trade networks could grow up to build an international fair trade system, which would make visible at global level regulations based on the respect of labour, transparency and solidarity. This system

could compete with WTO rules. Socio-economic chains based on the principles of solidarity, be they SSE initiatives, responsible companies or industrial clusters will also make new rules for global regulations emerge. All those movements will need the complicity and collaboration of local and State authorities to operate, grow and articulate. SSE strategies should thus aim at this articulation and building up, as well as cooperation with comprehensive public authorities at all levels.

The strategy mentioned above is a long-term strategy. Human survival must currently face the shortcomings and counter-effects of the current unbalanced set of global institutions, which can barely be labelled as a “system of global governance”.

Several strategies have been proposed by the new social and economic movements:

The confrontation strategy opposes whatever participation to current global institutions, and tries to torpedo negotiations in those institutions through mobilization and other types of action.

The reform strategy seeks to change the rules of the game by reinforcing those global institutions that are under-powered in the current set of institutions (International Labour Organization, UNCTAD and the United Nations itself) and the progressive international agreements (Biosecurity Protocol, International Criminal Tribunal, Kyoto Agreements, etc.), and striving to change the rules of the game in those institutions that are over-powered, through lobbying and training of representatives from the South (in the World Trade Organization, namely).

SSE does not believe that global economic and financial institutions are unnecessary. From its perspective, there are two important and complementary objectives to achieve:

To check and balance the power of current financial and trade organizations through other international organizations expressing the rights of people, labour (ILO), of the environment and common goods.

To make a deep reform of financial and trade organizations, be it through reform or replacement (depending on the political conjuncture), so that their mechanisms would be legitimate, and they would follow the rules of a sustainable economy rather than the interests of financial institutions and major corporations.

The current state of global insecurity is due to strong unbalances in modes of production and exchanges, and long-term trends. Those trends have led to ecological and social disasters in many areas: climate, biodiversity loss in all ecosystems, silent and obvious contamination, water, soil degradation, poverty, pandemics, terrorism, war. It is thus urgent to define the major priorities for humanity and set up emergency programmes, based on international mobilization.

Emergency programmes are necessary to face each one of those challenges. They must not be imposed on the populations through any “enlightened dictatorship”, be it ecological or political. New economic movements should ally to ecological and social movements as well as involve civil society and public authorities to elaborate and propose global plans of actions to face those challenges.

While facing the emergencies, it is urgent to build up new rules and institutions for a balanced and sustainable system of global governance. These institutions, and the system they will amount to, will be based on an entirely new set of rules, reflecting values of cooperation, solidarity and sustainability, rather than competition, greed and scarcity as today. Those rules will ensure the common good, the satisfaction of basic human needs, and be based on legitimacy and society's participation.

The principles underlying those new sets of rules have been presented above as the general principles for a legitimate and sustainable governance. They are: a land-based approach, active subsidiarity, organising the co-operation and synergy between actors, defining the rules for the economy, participation, transparency and accountability.

Annex A

DIFFERENT NAMES AND PRACTICES THAT ARE COMPLEMENTARY TO EACH OTHER

Popular Economy or People's Economy: has been a term broadly employed in Central America, in Brazil and in Asia. Initially it was meant to express a people-controlled economy in contrast with the capital-dominated economy. However, it is also meant to encompass the whole informal sector of the economy, where a variety of spontaneous forms of survival found by unemployed workers and their families prevail. As this became clear, especially in Latin America, a new trend began to emerge “from popular economy to solidarity economy”, expressing the challenge of attracting, educating and helping organize the informal sectors into cooperative forms of organization and solidarity-based modes of exchange, finance and consumption. A more elaborate version of the term is *popular solidarity economy*, commonly used in some states of Brazil.

Social Economy or Socioeconomy: this term has been used by forums and networks with the purpose of expressing the conceptual shift from a capital- and individual-oriented economy, to an economy centered on the social individual, wherein the needs and aspirations of each and every citizen and the limits of the Earth determine production, trade and the use of technology.

Economy of Work: this term has been used by José Luis Coraggio, an Argentinian professor and action researcher who distinguished the economy of capital from the economy of work or labor. The focus on workers as the true producers of wealth and the value-givers makes his approach convergent with those related to a social economy and a solidarity economy.

Solidarity Economy or Socioeconomy: this term and concept was born in Chile, adapted from Luis Razeto's work on “a solidarity market”. It is the most common form of addressing the project and the praxis of an economy focused on the social human being and based on the values of cooperation, reciprocity, sharing and solidarity. The addition of *solidarity* to *socioeconomy* is not tautologic, since *social* is related to human collectives whereas *solidarity* is a value that is to become dominant in the organization and the management of the common house (eco-nomy). The shorthand version Solidarity Economy has been adopted as the common reference of participants of the various editions of the World Social Forum.

Neighborhood Economy: this is a common expression in France, to refer to a community-based economy, which has a common territory as its base.

Economy of Communion: this is a specific form of microeconomic management promoted by a Catholic movement based in Italy, the Focolari. Its basic concept is the communion of goals and the sharing of responsibilities and benefits between entrepreneurs and workers of individual firms. Its overall goal is human development and it defines sharing as the cultural foundation of the economy of communion, and this makes it a particular form of solidarity economy.

Ecovillages: this model incorporates sustainability in a systemic fashion the environmental, social, economic and spiritual realms of human existence. It is the whole web of life, and not only economic growth, that is sustained in each ecovillage. It is community-based, and at the same time it is a global movement that unites East and West, North and South in a common agenda. Its principles can be applied both in rural and in urban contexts, in countries at different stages of development, promoting cooperative solutions to human and social needs, while protecting the environment and increasing the quality of life.

General principles that permeate SSE practices in different countries

- Human- and people-centered development.
- The social value of human work, knowledge and creativity.
- An economy aimed at needs and rights, rather than profits or unlimited accumulation of material wealth.
- An economy that organizes economic activity around the recognition of the right of all to socioeconomic security (life, food, work, environment, housing, health, sanitation etc.)
- An economy based on social and intergenerational solidarity.
- An economy that replaces scarcity with abundance and unlimited growth with an economy of sufficiency.
- An economy that endeavors to generate full satisfaction of the material needs of each and every member of society as the axis of technical creativity and economic activity.
- An economy that promotes non-hierarchical forms of governance and management, from the sphere of community and firm to that of the planetary society.
- An economy that recognizes the fundamental place of woman and of the feminine values and ecologic awareness in an economy based on solidarity among people, genders and generations.
- An economy that promotes efficiency not limited to material benefits, but also focused on social benefits in view of always better quality of life and the happiness of each and every participant, in dynamic balance with the ecosystem.
- An economy that seeks a harmonious and sustainable interchange with nature.
- An economy based on the values of cooperation, respect for biological and human diversity, reciprocity and solidarity.
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An economy organized to be a powerful instrument to overcome social exclusion, as it provides opportunities of work and income for the satisfaction of the needs of all. It proves that through cooperation and solidarity it is possible to organize production and reproduction of society in ways that eradicates material inequities and generates unity while respecting diversity.

¹. Transparent, direct (as much as possible) and long term trade relations between producers and consumers, fair prices to the producers, based on production, living costs, and the opportunity for sustainable development