

## 8 Trade unions and social movements at the crossroads

A Portuguese view \*

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### Introduction

Trade unionism today is faced with two radical options: either it dies, or it reinvents itself. In light of this situation, in this text we attempt to provide a brief critical overview of the relationship between trade unions and broader social movements. While trade unions and social movements may assert themselves at different times, and their degree of maturity may vary according to geographical, political and ideological contexts, both are organized in response to the oppressive dynamics generated by capitalism. Very often one or the other has positioned itself historically in opposition and given a voice to groups and/or sectors of society who have been oppressed or silenced. Thus, both trade unions and social movements legitimize their discourse and their practice in the spirit of emancipation and of dignifying the identities formed both within the workplace and outside of it but grounded in the working classes. Perhaps a rapprochement between these two areas of civic participation could once again create a voice for and reinvigorate politically the concept of “the people”. Their potential for resistance may prove decisive against the corrosion of democracy in this second decade of the 21st century.

It should be noted, nevertheless, that narratives about trade unions and social movements are also replete with fears and perplexities on both sides. In the case of Portugal (to which we devote special attention in this chapter), trade unions and social movements seem to have historically had a “life of their own” because, despite sometimes following convergent paths, they have not been known to articulate or establish joint initiatives or common programmes of action (Costa, 2015; Estanque, 2012b; Estanque and Costa, 2012). The contemporary trade union movement that emerged with the process of democracy-building more than four decades ago (after 1974) has been the main representative of the interests of the world of work, although historically other movements (such as the student movement) may have also had an active role in rebuilding democracy.

As a result of the international economic crisis that has mainly affected the periphery of the eurozone, it can be said that “austerity” has become the unifying “big issue” that has created greater synergies between the trade

union movement and other socio-occupational movements. In Portugal, particularly since the end of 2010, labour relations have been disrupted in several areas, with implications for working hours, contractual arrangements, rules for dismissal and so on. Consequently, the strongest elements associated with the formation of a wave of protests seem to be related to a “return to materialism” (Estanque et al., 2013: 33), particularly in relation to work and employment.

Our concern in this text, therefore, is with examining the role of trade unions and of the new socio-occupational actors in parallel, and identifying points of tension and complementarity between them: on the one hand, from a theoretical perspective, by reclaiming theories that have historically justified action taken by trade unions and social movements, and on the other hand, with a focus on the Portuguese case by examining not only the old trade union actors centred around the workplace but also the new actors and the emerging socio-occupational movements. In addition, we seek to locate the impacts caused by austerity policies within the world of work and to interpret some “traditional” iconic episodes of social conflict (strikes) and new “innovative” forms of social conflict (broader social protests). In fact, it is in these episodes – with a shared background in denouncing austerity – that we find both the foundations for possible alliances between trade unions and social movements, and resistance from both sides. Finally, and continuing with the Portuguese case as a reference point, the following are some open challenges facing both trade unionism and contemporary social movements.

### **Theoretical background for trade unions and social movements**

It would not be possible to condense the main theoretical references for trade unionism and social movements into just a few pages. In the case of trade unionism, we have only identified a few theories on trade union action as well as some models and typologies. In the case of social movements, we shall briefly recall some classic theories in order to verify to what extent they do or do not fit the new emerging socio-occupational movements in the “age of austerity”.

#### ***Theories, models and typologies of trade unionism***

Taking as our reference, inter alia, the proposals of Poole (1981), Larson and Nissen (1987), Paquet et al. (2004) and Hyman (2001), we define two sets of theories. First, there are the *moral and ethical theories* and the theories about “*psychological*” or *defensive reactions* in the face of the early stages of industrialization. Second, there are the theories that can be located within the “class-market-society” triangle (Hyman, 2001).

According to *moral and ethical theories*, trade unions are a product of the ethical and moral values that emerged in the 19th century. In the 20th century, there was an emphasis on the idea of justice in the labour movement. To this end, John Rawls (1972) advocated a general concept of justice:

all primary social goods, such as freedom and opportunity or income and wealth, should be distributed equally. Similarly, in *The Division of Labour in Society* (1989) [1893], Émile Durkheim argued that the main task of the advanced industrial societies was the “work of justice”, which conceived social relations according to criteria of increasing equality. In short, within the framework of these theories, trade union movement is a moral institution based in both Christian Protestant socialist movements and the Roman Catholic Church. In the latter case, the papal encyclicals – *Rerum Novarum* (1891) by Pope Leo XIII, *Quadragesimo Anno* (1931) by Pope Pius XI or *Laborem Exercens* (1981) by Pope John Paul II – considered trade unionism as a path to the moral regeneration of society (Larson and Nissen, 1987: 6; 252).

In turn, the trade union movement as a “psychological” or defensive reaction in the face of the early stages of industrialization (Poole, 1981: 14–15) corresponds to the first phase of the Industrial Revolution, the context that created the workers’ response to the loss of social status and collective identity as a result of technological innovation (Paquet et al., 2004: 301). But there was also a struggle against the potentially perverse effect of intellectuals within the trade union movement, which meant that labour had to fight not only capital but also members of the *intelligentsia* who sought to divert trade unionism from its basic objectives, even though the intellectuals were supposed to frame trade union programmes and shape their policies (Perlman, 1928: 162).

Third, what we might call “market” trade union theories take us back to the “economic conditions” of trade unionism (Poole, 1981: 15–16). In fact, at the beginning of the 20th century, the Webbs had assigned importance to the “economic relationship” as the characteristic trait of modern trade unions. In this sense, trade unions were mainly economic institutions, not moral, psychological or revolutionary. American *business unionism*, associated with relatively qualified categories of workers, was the best illustration of the concept of trade unions as economic players (Hyman, 2001: 8–9). Even if the labour market can hardly be considered a real market (Hyman, 2002: 8), the slogan of *pure-and-simple unionism* has been oriented, since the end of the 19th century and by the influence of the *American Federation of Labor* (AFL) led by Samuel Gompers, towards essential economic objectives: meeting the specific interests of workers in employment, in the context of industrial production; collective bargaining as a means of obtaining better working conditions; more “job consciousness” than “class consciousness” (Larson and Nissen, 1987: 131; Paquet et al., 2004: 302).

The contribution of theories of “class” to the analysis of trade unionism leads inevitably to the Marxist school of thought, which made political conflict and class struggle synonymous with industrial conflict because “the modern bourgeois society that has sprouted from the ruins of feudal society has not done away with class antagonisms” (Marx and Engels, [1848] 1982: 107). But the centrality of conflict was not exclusive to Marxist thought. Thus, distinct from a “unitary” vision – where the trade union movement did not have a representative function nor the role of regulating

conflict – pluralist theories regarded trade unions as a form of institutionalized social regulation, and collective bargaining as the institutional means by which the conflict between employer and employee would be regulated. We believe that the class struggle did not disappear from the framework of labour relations, as the grounds for its existence did not disappear. Precariousness, insecurity and exploitation resulting from austerity policies in industrial relations and on trade unions, especially at the periphery of the eurozone (Costa, 2012a,b; Estanque, 2012a), provide plenty of pretexts for a class struggle. However, as Hyman cautions, such a struggle is marked by three kinds of tensions: “between socio-political transformation and pragmatic economism; between confrontation and compromise; and between class solidarity and sectionalism” (Hyman, 2001: 28–30).

Finally, trade union theories of “society” value the democratic and integrative components of the trade union movement, and emphasize social dialogue and the role of trade unions as social partners. As argued by Hyman (2001), additional effort is required for the trade union movement to consolidate itself as an actor in civil society, all the more since social democratic trade unionism based on negotiation or institutionalized partnership with governments and employers no longer seems to offer guarantees of producing positive results (Hyman, 2001: 56). Hence the need to reclaim the role of social movement for trade unionism and to build, both at national and supranational levels, alliances with other civil society organizations (Bieler, 2014; Costa, 2008; 2015; Hyman, 2002: 29).

While there are a variety of theories, it is not surprising that there are also different “trade union models” as well as various criteria to distinguish them (even when taking into account Western European countries only): membership and trade union density; the importance of ideology; the boundaries between sectors, between public and private; occupational status; the relevance of trade union democracy; concrete results of union action; and so on (Gumbrell-McCormick and Hyman, 2013: 6–8). Consequently, it is possible to distinguish several groups of countries. On the one hand, the *Nordic countries* (particularly Sweden, Denmark, Norway and Finland) have industrial relations systems based on “institutionalized class compromises” between capital and labour; high levels of unionization; a lack of ideological divisions; separate organizations for manual, white collar and professional or graduate employees; and so on. On the other hand, the *central countries* (Germany, Austria, Switzerland, the Netherlands and Belgium) are characterized by consolidated traditions of social partnership; relatively low trade union density (except in Belgium); encompassing collective bargaining combined with provisions to extend agreements to non-signatory employers; statutory systems of works councils normally dominated by trade union representatives; and, finally, less pronounced welfare state structures than in the Nordic countries but with relevant space for trade union involvement in public policymaking. Third, the *southern countries* (France, Italy, Spain, Portugal and Greece) are characterized by a strong presence of communist

parties as well as the importance of ideology in the trade union movement, highly politicized industrial relations, employment regulation frequently dependent more on legislation than on collective bargaining and so on. Finally, the *English-speaking countries* (Britain and Ireland) are closer to “liberal markets”, trade unions are relatively fragmented along occupational and industrial lines and trade unions have to win recognition company by company (Bernaciak et al., 2014: 7–9). Beyond the theories and models, it is also worth recalling some typologies of trade union action, such as the now classic typology that distinguishes between *opposition*, *integration* and *control* trade unionism (Touraine and Mottez, 1970). As *opposition*, trade unionism is an agent of class struggle, with an internationalist vocation, a rejection of capitalist society and rooted in a Marxist conception of social classes. In turn, the trade union movement of *integration* is associated with power, characterized by a high degree of involvement in various official institutions (economic, social and political). Though it does not disappear, the assertion of rights aspect of the trade union movement fades into the background. Finally, the trade union movement of *control* is characterized by accepting working-class access to power but without direct participation in it (Touraine and Mottez, 1970: 266).

The second typology is part of a broader distinction between trade unionism of *negotiation* and *contestation*. As a protagonist in negotiation, trade unionism also asserts itself as an agent of participation. Conversely, the *trade union movement of contestation* is marked by a strong mobilizing capacity and supports the idea that contestation is a prime way of obtaining trade union demands (Estanque, 2012a).

The third typology is *social movement unionism* (Adler and Webster, 1999; Costa, 2008; Dias, 2011; Lambert and Webster, 1988; Moody, 1997a,b; Munck, 1988; Scipes, 1992; Seidman, 1994; Waterman, 1993; 1999). It may be an exaggeration to talk about a typology in the same sense as the aforementioned, which were marked by political and economic constraints. Indeed, distinct from the previous typologies, social movement unionism highlights the relationship of trade unionism not only with itself but also with what lies “beyond” the trade union movement: “neither the unions nor their members are passive in any sense. Unions take an active lead on the streets, as well as in politics. They ally with other social movements” (Moody, 1997a: 59; 1997b: 276) in an attempt to break down “the binary oppositions between workplace and community, economic and political struggles and between formal sector workers and the working poor” (Munck, 2000: 93).

### ***From theories of social movements to the new socio-occupational movements***

The “old” theories of the so-called New Social Movements (NSMs) – proposed by authors such as Touraine, Offe, Gohn, Inglehart, Melucci, Cohen, Arato and Tarrow – are probably insufficient for an up-to-date analysis

of the movements of protest and social rebellion at the beginning of the 21st century. This does not mean, of course, that the “classic” literature is not always useful in helping us to identify the breaks and discontinuities between the past and the present.

One of the key writers on NSMs, Sidney Tarrow (1995), has suggested that a “cycle of protests” or collective action is defined by five key elements: (a) the intensification of a conflict and its geographical spread; the emergence (b) of non-organizational actions and (c) of new organizations; (d) new symbols, ideologies and interpretations of the world; and (e) the expansion of repertoires of action in each cycle of protest. It is a process of this kind that seems to have emerged in recent years. Many other cycles of protest and social revolutions occurred throughout the 20th century. However, in recent decades the phenomena of change, of conflict, of collective action and, generally speaking, of the “social question” have taken on new contours and now occur on a global scale. With globalization, the very concept of society has begun to be questioned. The latest wave of social movements needs new conceptualizations and analytical instruments. At the same time, the depth of change – and the very concept of “revolution” – has now acquired new contours and issues as well. Almost 100 years after the mythical Bolshevik revolution and more than 40 years on from the Portuguese “Carnation Revolution”, societies have changed drastically. The social context in which we live today is very distinct from that of a hundred or even 40 years ago, as is our own understanding of society and of the processes of change.

If we take into account a distinction made in studies of social movements, between *social critique* and *artistic critique* (Boltanski and Chiapello, 2001) – the former referring to “old” social movements (the labour movement and trade unions, essentially) and the latter to the “new” social movements that emerged in the 1960s (the environmental, feminist and student movements, essentially) – we can then carry on this discussion by establishing a dialogue between the two fields in question here: (1) on the one hand, the field of labour and employment; and (2), the symbolic and cultural field. That is, it makes sense to direct our gaze at the old tension between labour struggles that were advanced from within the sphere of production and most of the “new” social movements, which take place in the sphere of consumption and are considered struggles of identity, culture or “post-materialism”.

Undoubtedly, some traditional approaches to NSMs from the 1960s and 1970s have lost their sharpness in recent times. The classic definition by Alain Touraine (1981 and 2006) and his renowned defining principles of social movements – *identity* (who are we?), *opposition* (who are we fighting?) and *totality* (what kind of society are we fighting for?) – can hardly explain the current mobilizations. *Identities* today are fragmented and ill-defined. Even if it can be argued that the intensity of collective action induces participants to a certain feeling of affinity, this tends to be stealthy and quickly dissolved among the polymorphic crowds. If it is true that there is an adversary (the principle of *opposition*), it is not always clear against which opponent each of

these mobilizations is defining itself. In some cases, it is opposed to oppressive regimes and their representatives, in the personification of a dictator whom to fight against. In other cases, the opponent is abstract (capitalism) or is a specific power (a local authority, minister X, government Y) and that may change and become even more distant opponents (the central Government, the IMF, the European Commission and so on).

As for the principle of *totality*, if this refers to an alternative model of society (for example socialism), it is well known that such a designation is far from being the unifying element in the social movements of the 21st century.<sup>1</sup> Until a new utopia arises that is capable of imposing itself as an *alternative* to capitalism, the unknowns and ambiguities of these movements will tend to persist. The global protests of recent years (Ortiz et al., 2013) reveal a lack of strategic direction, leadership and ideological reinvention; and even the idea of “a better world”, while all very well, relegates “the alternative” to a rather vague and distant horizon. Most of the demonstrations and socio-political protest networks are defensive in nature; those who rebel may be aware of what they do not want, but they do not know exactly what they do want. It could be said that, instead of the old revolutionary vanguard, the recent riots seem, as Boaventura de Sousa Santos has suggested, to follow the logic of “rearguard actions” (Santos, 2012). Whether because of scarce and dispersed resources that can be mobilized by the groups and social sectors that form part of public protests or because mobilizations are generally diluted or dissolve rapidly, it is difficult to anticipate their real impacts and their capacity to transform society (Cohen and Arato, 1992; Santos, 2006).

## **Old union actors and new socio-occupational actors in Portugal**

### ***The CGTP and the UGT***

Since 1978, Portuguese trade unionism has been structured according to a “polarisation at the top” or “dual trade unionism” (Costa, 2005). On one side, there is the General Confederation of Portuguese Workers (*Confederação Geral dos Trabalhadores Portugueses* or CGTP), founded secretly in 1970 while Portugal was still under a dictatorship. At its founding, CGTP established itself as a “class-based, unitary, independent, democratic and mass trade union organization, which has its roots and its principles in the glorious traditions of organization and struggle of the working class and of Portuguese workers”. In fact, in relation to Hyman’s typology (2001), it can be said that CGTP represents a *class-based* trade unionism, which draws its strength from anti-capitalist mobilization and class struggle. Historically, it is therefore a trade union organization of blue-collar workers with low educational qualifications. However, in recent years the CGTP has strengthened its influence in public administration and, consequently, in the number of unionized members with higher educational qualifications (Rebelo, 2012: 11).

In turn, the General Union of Workers (União Geral de Trabalhadores or UGT) was created in 1978 as a reaction to the hegemony that CGTP (close to the Communist Party) enjoyed in Portuguese society. Essentially composed of office, banking and insurance unions, UGT was at its founding doubly supported: within Portugal by the Socialist and Social Democratic parties; abroad, by the trade union confederations of Central Europe and Scandinavia, the German SPD and the Ebert and Naumann Foundations. A political and ideological rival of the CGTP, UGT was built and consolidated itself around a coalition of service unions and white-collar workers. Again according to Hyman (2001), the UGT represents a *society-based* trade unionism, not least because trade unions are advocates of social integration and the promotion of social dialogue.

Hence, as we have noted in another publication (Estanque and Costa, 2014) communist influence in the CGTP, coming from a party tied to a counter-power strategy, overly favoured a trade unionism of contestation (permanent opposition). In turn, the socialist and social-democratic influence over UGT, coming from a party without vocation as an opposition party and without a trade union culture, overly favoured a trade unionism of negotiation. The extreme positions of a contestation trade unionism (which often does not produce tangible results) and negotiation trade unionism (which often confuses participation with submission to management priorities) contributed to creating a void in which defensive trade unionism prospered within a general framework of de-unionization (Santos, 2000).

At the same time, it is important to consider the profound recomposition of the labour market and its effects on the employment sectors considered as "middle class". For instance, there was a strong pace of feminization in particular categories of the middle class (unlike blue-collar labourers and agricultural workers) in recent decades, which benefitted from integration of the EU. This is very evident in various professions and even more pronounced in the case of administrative employees (public and private sector), reflecting that the gender issue is inseparable from new lines of general segmentation of the labour market and of social stratification. In the Portuguese case, there was a significant feminization of some sectors, namely healthcare and education services (Crompton, 2009; Grusky, 2008). The progressive reduction of labour rights mentioned earlier not only contributed to the strong increase in insecurity and unemployment among traditional segments of the workforce but also had a devastating impact on the more skilled working-class groups, especially the middle classes. In recent years, the escalation of the crisis and the austerity measures put into question the old capital-labour compromise of the Fordist period, which in the Portuguese version was a later project built under the influence of strong social struggles of the 1974–75 period. Basically, the public sector and social policies, which served as the key elements of the middle classes and of social cohesion in the country, entered into loss. While the welfare state suffered setbacks, the compulsory impoverished middle class was spreading out. So, the old class compromise and the social dialogue turned into an imposition



of precarious conditions to the weaker partner in the social contract and before the spectre of unemployment, workers settled on the idea that any job opportunity – even without proper conditions – is preferable to unemployment. Consequently, the former upward social mobility flows of the working class began to sway and sent those sectors into situations of economic difficulty, indebtedness, shameful poverty and so on, with the loss of material means and professional status to step up brutally. The new Portuguese middle class has always lacked weight and had dubious strength compared with more advanced societies in Europe. However, in recent years, before the restructuring of the state, wage cuts gave rise to massive social decline regarding labour rights, with disastrous consequences from a social point of view, which explains the strong involvement of these social layers in the conflicts that have occurred in the country since 2011 (Estanque, 2012a; 2014).

### *New socio-occupational actors/movements*

In addition to the trade unions, at least three sets of socio-occupational actors have gained prominence in Portuguese society in recent years: the group FERVE (*Fartos d'Estes Recibos Verdes* or Fed up fed up of This Green Receipts<sup>2</sup>) the *MayDay Network* and the *Precários Inflexíveis* (Inflexible Precarious Workers) movement, subsequently renamed *Associação de Combate à Precariedade* (Association Against Precarious Work).

FERVE was created in March 2007 with the aim of denouncing work situations that overused “free-lance” invoices (known in Portugal as “green receipts”) instead of regular employment contracts (exemplified by call centre workers but also by those self-employed in liberal professions) and to promote a broad debate on precarious work in order to raise its visibility. FERVE laid the foundation for the identity of the “precarious worker”. Since September 2012 its campaign against precarious work has been taken on by the *Associação de Combate à Precariedade – Precários Inflexíveis* (ACP-PI).

As a product of the *marches européennes contre le chômage, la précarité et les exclusions* in the 1990s, the *rede MayDay* emerged in Portugal in May 2007. Since then it has consecrated May Day as a day of struggle against precarious work. This trans-European network that includes the participation of feminist, anti-capitalist and anti-precarious work groups is deeply rooted in the actions of anti-globalization movements, and is based on the idea that the anti-capitalist struggle must go beyond the limited scope of trade unionism and the struggle for workers rights to include other issues related to the “commodification of life” (Estanque, 2012b: 11).

The movement of workers *Precários Inflexíveis* (PI) emerged in Portugal in May 2007. Its concerns were similar to FERVE but sought to encompass the multiple dimensions of precarious work. For PI, “reinventing the struggle” assumes that traditional forms (especially trade union strategies) are unsuited to the current context. Its slogans are appealing and reveal their determination to fight the situation – “precarious yes, but inflexible” (Estanque, 2012b: 12). In July 2012, the PI was renamed *Associação de*

*Combate à Precariedade – Precários Inflexíveis* (“Association against Precarious Work-Inflexible Precarious Workers” (ACP-PI), seeking a “more ambitious” role, with capacity to act at the national level. But the concerns of the ACP-PI remain very much influenced by austerity and precarious work. At the end of 2014, the ACP-PI reckoned there were about 1.2 million precarious workers in Portugal, and a growing number of Portuguese people who are unable to get more than a part-time job or a temporary contract to pay the bills at the end of each month (Costa, 2015: 268–69; Estanque and Costa, 2014). It is important to underline that most of these hardships are faced by young and qualified workers, who grew up with the expectations of having better job opportunities, at least as good as their parents, which did not happen. In fact, it has been quite the contrary.

### **Can austerity also aggregate?**

In this chapter we pay special attention to the impact of austerity on industrial relations. This impact has been primarily disruptive. However, austerity has affected society as a whole and not just the world of work. In fact, its impact has served as a stimulus to reaction by both trade unions and the new socio-occupational actors. In a sense, austerity has theoretically created the preconditions for joint trade union and social response strategies.

#### *The impact of austerity on industrial relations*

The austerity measures resulting from the *Memorandum of Understanding* (MoU) signed with the *troika* (the group of international creditors composed of the International Monetary Fund, the European Central Bank and the European Commission) in May 2011, and the subsequent amendments to employment law, have raised controversial issues, such as greater flexibility in the labour market, the devaluation of wages and increased working hours (Costa, 2012b; Leite et al., 2014).

- *Greater flexibility in the labour market.* On the one hand, since the drafting of the *Green Paper on Labour Relations* in 2006, Portugal’s employment law was found to be too rigid. Referring to the difficulty of dismissing workers with permanent contracts has become common place (Dornelas et al., 2006: 186) and the high degree of protection enjoyed by permanent contract jobs, identified as characteristic of the employment model in southern European countries (Karamessini, 2007: 24). As part of the austerity measures, reducing compensation for dismissal, making it easier to dismiss employees on grounds of unsuitability or abolition of the job were some of the more significant changes required in the MoU to make the labour market more flexible.
- *Devaluation of wages.* Besides the sense of social injustice resulting from the pay cuts for civil servants, the lowest wage earners were also penalized.

An important element of social justice, the minimum wage is also financial support that is essential for the survival of many families, especially in countries like Portugal, where the risk of poverty for workers is 12 per cent (8 per cent in Europe), an indication that wages are insufficient to tackle poverty (Dornelas et al., 2011: 18). Nevertheless, the second update of the MoU (December 2011) stated that “any increase in the minimum wage will take place only if justified by economic and labour market developments and agreed in the framework of the programme review” (point 4.7.i)). Even after the troika left Portugal in May 2014, the devaluation of wages remained on the agenda. Indeed, the Banco de Portugal revealed in October 2013 that between 2011 and 2012 over 39 per cent of workers who managed to keep their jobs saw a reduction in their salaries. This reduction was in the order of 23 per cent. Added to this, Portuguese people who changed jobs during this period also saw their incomes drop by about 11 per cent. Further still, among the “employees who kept the same employer and whose earnings remained constant in 2012, about 18.6 per cent receive the minimum wage” (Banco de Portugal, 2013: 37).

- *Increase in working hours.* Lastly, the increase in working hours was achieved through cuts in paid and public holidays, the creation of individual working-time accounts/*banco de horas* and the end of time off in lieu. As a consequence, Law No. 68/2013 increased the normal working day for public service employees from 35 to 40 hours. By placing Portugal into the group of countries that work the most hours per week, this law would seem very questionable from the standp; its effectiveness in increasing productivity. As shown in a st the Directorate-General for Administration and Public Empl (DGAEP) published in January 2013, working more does not with being more productive: “There is no consistent relations tween the number of hours worked and productivity”. And

even though Portugal has a higher than average number o worked per week, whether in total employment or full-time e ment (39.1 and 42.3 respectively), higher than Germany (35.6 and 42), its productivity rate is a little under half the German rate

(Asensio et al., 2013: 57)

There are therefore several impacts, in addition to the increase in precarious forms of employment and unemployment, that *legislated* austerity (with the revision of the labour code) has produced in industrial relations: loss of independence by social partners, especially trade unions, who have seen their position become ever more insubordinated; increased tension in the relationship between the actors in industrial relations (including within trade unionism); increased asymmetries in the labour market, particularly among high-income and low-income classes, or in the relationship between public and private sectors; a sharp fall in household purchasing power; lack of reduction in the

competitiveness deficit of businesses (Costa, 2012b; 2015; Fernandes, 2012; Ferreira, 2012; Gomes, 2012; Rebelo, 2012). In particular, Leite et al. (2014) confirmed a transfer of earned income to capital, which translated as a halving of wages for overtime, implying an average cut of total employee pay of between 2.3 per cent and 2.9 per cent in 2013; a reduction in pay for working on public holidays, corresponding to a cut of 75 per cent of that portion of the employee's income; an increase of one hour per week (now unpaid) in production, while the actual price of the additional time was reduced by half. After a year, the employee had given the company between 7.9 and 12.8 extra days of work for no additional pay – a concession of advantages to businesses, translated as an increase in their gross surplus of between 2.1 and 2.5 billion euros.

### *Union and social movement reactions to austerity: cycles of protest*

#### *The role of general strikes*

It would be an exaggeration to say that Portugal is a country of strikes. In fact, despite intense strike activity between the late 19th century and the first decades of the 20th century – between 1871 and 1920 there were 4,636 strikes (Tengarrinha, 1981: 585) – over the 48 years of dictatorship that Portugal went through, strikes were prohibited (they were actually considered a criminal offence), and freedom of collective bargaining did not exist (Almeida, 1996; Costa, 2005). Only with the process of democratic transition (from 25.04.1974) did strikes once again occur in Portuguese society. The second half of the 1970s was probably the period of greatest collective mobilization, under the influence of a class-based discourse that advocated the overthrow of capitalism. Later, in the first half of the 1980s strikes were aimed at defending “the gains of April” and at destabilizing right-wing and centrist governments (Stoleroff, 2013: 231). However, Portugal's entry into the European Economic Community, an event that coincided with the institutionalization of social dialogue with the participation of trade unions, saw a strong downward trend in the number of strikes (only reversed in 1989, with 307 strikes and 296,000 workers on strike), reaching a record low of 99 strikes in 2007 involving about 29,200 workers (Costa and Reis, 2014: 185). Only since the end of 2010 with the onset of austerity, has there been a new intensification of forms of social protest and strike activity.

There is no room here for an analysis of strikes by sector;<sup>3</sup> we shall focus only on general strikes, strikes that mobilize the whole of society. In this sense, there have been five general strikes in Portugal since November 2010. Three of the general strikes were combined actions, uniting the two main trade union confederations (CGTP and UGT) against austerity policies (24.11.2010, 24.11.2011 and 27.06.2013). On the other hand, the other two general strikes were called by CGTP only (one was held on 22.03.2012 and the other on 14.11.2012), also against the austerity of the government and the *troika*.

Joint general strikes were called as follows: the general strike of 24.11.2010 was against wage cuts (between 3.5 per cent and 10 per cent) for civil servants

whose income was above 1,500 euros; the strike of 24.11.2011 was against the 50 per cent personal income tax surcharge on the Christmas bonus for 2011, and against cuts in holiday and Christmas pay for civil servants in 2012; the general strike of 27.06.2013 was against the content of the *Fiscal Strategy Document for 2013–2017*, which established measures for reform of the state: retirement at 66 years of age; increased civil service working hours from 35 to 40 hours; reduction in holidays; an increase in contributions to the social welfare system for civil servants (ADSE); a reduction of 30,000 civil servants, the special mobility scheme and so on.

The other general strikes were called by CGTP only and were mainly strikes either in strong criticism of the government or in reaction to the fact that UGT, both in March 2011 (following the combined general strike of 24.11.2010) and in January 2012 (following the combined general strike of 24.11.2010), signed social dialogue agreements with employers' associations and the government (in the first case with a socialist government and in the second with a social democratic government). Such agreements – respectively designated *Tripartite Agreement for Competitiveness and Employment* (23.03.2011) and the *Commitment for Growth, Competitiveness and Employment* (18.01.2012) – highlighted again some moments of tension between CGTP and UGT. The general strike of 22.03.2012 was therefore a reaction to the agreement of 18.01.2012 that confirmed the measures of the MoU with the *troika*. In turn, the general strike of 14.11.2012 came after the state budget proposal for 2013 (based on a “massive increase in the tax burden”, in the words of the Minister of Finance) but was especially significant as it was part of a European day of protest called by the European Trade Union Confederation. Although the leadership of the UGT did not call the strike, it should be noted that over 30 UGT unions decided to take part in the demonstration, which shows that acceptance of the UGT leadership's decision was far from peaceful.

#### *Larger social demonstrations and protests*

On a global scale, the various events and waves of protest in recent years share some common characteristics in that they are inspired by sections of the educated young, communicated through cyberspace, organized flexibly over networks without identifiable leaders and spontaneous in nature. Media exposure – especially the role of cyberspace – means that the images and the drama of crowds in revolt, or the collective celebration of a victorious outcome, might trigger a copycat effect that could rapidly spread whenever the specifics of the local context prove favourable.

In Portugal, in addition to trade union reactions, others have stood out, including<sup>4</sup> three major events: 12.03.2011 (led by the so-called “Desperate Generation”/ “Geração à Rasca”), 15.09.2012 and 02.03.2013.

- On 12.03.2011, dissatisfaction with political parties and representative democracy was clearly evident in the most popular slogans heard in Lisbon and Porto: “*If they want precarious workers, they'll get rebels!*”;

*"We want our lives back!"; "Salary theft!"; "The country is going to the dogs!"; "Enough of the trash economy!"; "Precarious workers are not suckers!"; "The people united don't need a party!"; "Precarious work sucks"; "Don't make me emigrate"; "I want to be happy"; "Who elected the markets?"* This huge demonstration brought 300,000 people into the streets of the two main Portuguese cities (about 200,000 in Lisbon and Porto 100,000), and was the largest social protest in Portugal since the "Carnation Revolution" of 25.04.1974 (Campos Lima and Artiles, 2013: 357). It was undoubtedly a turning point in that trade unions ceased to have the monopoly on social and industrial action, which is perhaps why it briefly became the subject of public debate. Two months later the *Indignados* and the *Acampadas of Democracia Real Já*, in the *Puerta del Sol* in Madrid, Spain, transmitted a similar message and did not miss the opportunity to invoke the Portuguese example (Velasco, 2011); and soon afterwards came the global wave of protest around the *Occupy Wall Street* movement, centred on New York but with global repercussions (Baumgarten, 2013; Vradsis and Dalakoglou, 2011).

- In contrast, on 15.09.2012 following the proposal of the right-wing coalition government to reduce employers' social security contributions from 23.75 per cent to 18 per cent and, in turn, increase employees' contributions from 11 per cent to 18 per cent (in what became known as the draft "Single Social Tax"/TSU), about one million people demonstrated angrily in most Portuguese cities, prompting the government to back down and withdraw the proposal. This event, similar to "12.03.2011", involved socio-occupational actors (especially the Association against Precarious Work – PI) and also relied on a strong cyber-activist culture, in contrast to what had been standard trade union practice.
- Finally, the 02.03.2013 was called by the "Screw the Troika" ("que se lixe a troika") movement, which had been involved in the 15.09.2012, protest supported by the CGTP. This movement was openly against the state reforms and the announcement of 4 billion euros in cuts to state welfare spending. Its activity had been conducted in line with its manifesto which read:

today we are a meeting point for various democratic anti-troika currents. We do not claim to represent organizations or social sectors. We want to discuss and coordinate initiatives to overthrow this government and all governments that collaborate with the troika programme.

It can be said that the wave of protests continued to be centred primarily around the world of work. It should be noted that socio-occupational issues were the ones to which most references were made in the *Desperate Generation* protests. It should be recalled, moreover, that on 12.03.2011, about half of the issues (49 per cent) to which the protesters made reference were work related, and, within this category, "green receipts", precarious work in

general, unpaid internships and unemployment were the most prevalent categories. In contrast, issues around the political system (14 per cent), transparency and fighting corruption (9 per cent) were among the most frequently mentioned, and, within these, criticism of nepotism, “political privileges” and “reducing the number of MPs” were the most common (Estanque et al., 2013; Soeiro, 2015).

In short, the main features of this cycle of protests in Portugal were as follows: *first*, there was a new dynamic – even if it is exaggerated to talk of a complete break with the traditional methods of collective action because there were moments of coming together with the trade unions – with an extension to normally “apolitical” sectors and innovation in the language and resources deployed; *second*, there was an interconnection between the use of “virtual” networks and the occupation of physical space and the sociability of face-to-face contact, established between “peers” that up until then were only connected via the internet, which accentuated the novelty effect and the “discovery” of the “real-virtual” as a facilitator of solidarity and defiance; *third*, an informal dynamic was constructed that was based on horizontal communication, networking and the refusal of personalized leadership; *finally*, a strong youth presence was obvious, coupled with an intergenerational confluence mobilized against precarious work, the suppression of rights and rampant austerity (Costa, 2015; Estanque et al., 2013).

### **Challenges for trade unionism and social movements**

The response to the challenges caused by the crisis and austerity confronts trade unions and social movements with a series of tasks. In the absence of more effective joint action between trade union organizations and socio-occupational actors, these tasks are designed to overcome the “walls” or internal barriers within both the trade union movement and social movements. It is not our goal to replace the reflection by leaders and protagonists of these two fields. As scholars, we are engaged in the study and the construction of democratic alternatives to contribute to opening up the debate. Without any patronizing intent, our experience of active involvement in the world of trade unionism and social movements requires us – side by side with the minority of academics who are concerned citizens in the field – to make a contribution to the debate, and one possibility might be to identify what we consider to be the urgent challenges that we will face in the immediate future. A discursive rapprochement by both parties may well cover the points we have discussed.

#### ***The tasks of the trade union movement***

We have stated elsewhere (Costa and Estanque, 2011; Estanque and Costa, 2013; 2014) that unions must look “inwards” in order to rethink the challenges of the past and the reasons for their success or failure. In addition,

they need to look “outwards” in order to be able to react to (or indeed, survive) austerity policies and strong global pressure on labour rights and trade unions. In our view, some of the main tasks of the trade union movement can be summarized in the following points:

- Strengthen vigilance on the manner and the conditions under which employment is offered;
- Fight to defend and restore collective contracts in the employment sectors where they have been the target of attack;
- Organize groups who are under-represented in trade unions (young people, women, the unemployed, precarious workers, ethnic minorities and so on.);
- Create partnerships and/or forms of action with non-union organizations that have an interest in the labour field, in particular associations of precarious workers;
- Strengthen trade union representation in the most vulnerable sectors, especially the so-called independent workers, illegal immigrants, commercial activities and so on;
- Strengthen internal union democracy, avoiding attempts at manipulation by partisan forces, especially those who resist change and are led by orthodox or a purely bureaucratic logic;
- Invest in training of staff and union leaders through programmes and agreements with universities and research centres with recognized expertise in these areas, encouraging critical analysis and self-criticism of trade unionism;
- Follow up the wave of social protests that has occurred in Portugal in recent years (since the end of 2010 Portugal, as mentioned before, has had five general strikes, three of them combining the two main trade union confederations, the CGTP and UGT);
- Intervene not only in the domestic sphere but also on a transnational scale, using networks to boost electronic trade unionism and give cyber-activism its due importance.

### *The tasks of the new socio-occupational actors*

In the Portuguese case, it is possible to argue that large social demonstrations have produced better results than trade union demonstrations, leading the Government to back down on austerity measures (15.09.2012, was a good example of this). As Castells stated (2012: 25–31), social movements in the age of the internet have distinctive features: (1) the existence of a contingent of qualified and unemployed youth able to lead the revolt, eliminating traditional power structures and representation; (2) the presence of a strong culture of cyber-activism, creating a public space that is critical of dictatorial regimes and with autonomy *vis-à-vis* state repression; and (3)



the significant spread of internet access, whether at home, in internet cafés or educational establishments, which, combined with the existence of sections of youth with high qualifications and no job, has made young people key actors of the democratic revolutionary processes that came up with the “Arab Spring”. For this author, social networks have created new forms of activism where the hybrid nature of face-to-face and virtual spaces has turned out to be a fundamental feature. In other words, this was not a mobilization process that depended only on the virtual space. The important thing is that the link between free communication on Facebook, YouTube and Twitter, along with the occupation of urban space, has created a hybrid public space, a “virtual-real” sphere for constructing freedom, which expanded from the Tunisian rebellion to a variety of countries and continents.

It could be said, therefore, that in the age of electronic communications, the tasks of the new socio-occupational actors are easier than those of the old trade unions. However, the new actors also demonstrate major weaknesses and face major challenges due to the strained relationship they retain with the older social movements (trade unions and political parties), given the absence of new ideological reference points around which to mobilize. Some of the possible tasks to be taken into account are as follows:

- Stimulate initiatives, debates and discussion networks to help promote cultures of resistance, perhaps supported by subaltern groups, and seek to ensure they establish continuity over time (for example, trade unions often accuse the new socio-occupational actors of isolated actions, without any continuity over time);
- Establish coherence and strengthen the links between different dynamics, organized groups and activist communities;
- Launch a debate about the European crisis and the current blockages in representative democracy within the organized associative sectors, in particular student associations in higher education;
- Encourage meetings and forums for debate around the issue of labour and precarious work, involving trade union representatives and academics with experience in the area;
- Faced with the crossroads and the situation of great perplexity in which Europe finds itself, with the enormous uncertainty and apprehension faced by the younger generations, European and international studies on youth and social movements – with special attention to what is going on currently in Spain and in Greece – could serve as a basis for future reflection capable of stimulating paths and new programmes around which to mobilize;
- The internet and social networks will continue to be key tools for the new 21st century activism, through which future leaders may emerge and new political platforms can be built that contribute to an effective renewal or reinvention of social movements, trade unions and political democracy.

## **Conclusion**

It is reasonable to believe that the neo-liberal principles that threaten to destroy social protection in Europe are a regressive force capable of imposing the sheer strength of the market, generating oppression and instability where before there was security and stability. This is where resistance movements should, especially in the European context, come to the defence of the welfare state under threat. At the crossroads where the modernity project finds itself today, its hesitations and blockages are played out under very contradictory dynamics, leading not only to processes of change and forms of action but also to the creation of ambiguities and setbacks.

One of the explanatory hypotheses explored here is that:

- H1: *the fragmentation of employment (and increased insecurity) has a significant impact on social cohesion and institutional activity. The intensification of inequality, on the one hand, and the ineffectiveness or paralysis of institutions and public policies, on the other, are decisive factors in the radicalization of social conflict and this may apply both in Europe and elsewhere (such as in Brazil, for example). The devaluation and instability of wage labour, however, has caused the emergence of new precarious employment sectors that are characterized by enormous diversity and at the same time are remote from trade unions or suspicious about the credibility of their leaders.*
- H2: *Thus, regarding collective action, we believe that social movements in the present time are fostered by various social strata, workers, the unemployed, the precarious youth, the retired people and other segments who have become aware of their fragile condition; in the more intensive period of austerity they claimed against those measures; their action was stimulated by feelings of frustration, and the blockage to access to a stable professional life and a standard of living in search of a middle class status. Possessing a higher level of education is a central criterion and it is worth bearing in mind the key role played by former trade union leaders linked to middle class categories, besides representing manual workers or other professionals.*
- H3: *A third hypothesis follows according to which the existence of a transformative collective subjectivity – for example, a latent compulsory drive focussed on the well-being of the subaltern classes but promoted by a disgruntled faction of the middle class – does not erase their social links and consumerism dreams. So, may be the personal ambitions of this category to replace their “frustrated status” will manifest themselves later on, even in the name of an alternative model of society, and probably will objectively result in the accommodation of previous protagonists into new seats of power, thereby (objectively) establishing a new class or class segment (this might be the case of new established segments of institutionalized trade union leaderships in Brazil).*

These trains of thought express our deep conviction that the trade union and labour movement on one side, and civil society organized into grass-roots

solidarity and associative movements on the other, will have to learn to come together and combine in future actions and organizational arrangements to halt and reverse the current course of events. The salvation of Europe and Western democracies depends greatly on the renewal of institutions and the rule of law. But the work of current institutions, while important, by itself has proved impotent in promoting structural changes that, in our view, the European project needs. In fact, watching the troubling political submission to the dictates of the financial economy, the atrophy of the welfare state in favour of the excessive commodification of labour and of social life in general, it becomes increasingly urgent to hear the voices of the people and the subaltern classes. Only with them, by means of collective action and the mechanisms of democratic dialogue, can we reclaim – and maybe reinvent – a European project based on solidarity, and consolidate a Europe of its citizens.

## Notes

- 1 Otherwise, the social movements of the 1960s and 1970s have revealed themselves to be disinterested in the old socialist utopia. In the shadow of old slogans like “the future is now”, “be realistic, demand the impossible”, “power is corrupt” or “think globally, act locally” new forms of democracy are exercising themselves, the limits of representative democracy have been declared and the field has been opened up to participatory democracy. In this way, they have sought to combine realism and utopia, radicalism and pragmatism.
- 2 Meaning fed up of working without a contract and labour rights.
- 3 The transport sector – very much affected by pay cuts and privatization processes or sub-concessions to private entities – was one of those to experience a greater number of strikes, although other socio-professional categories affected by austerity (as is the case of teachers and nurses) have also triggered several strikes in recent years.
- 4 For an analysis of discontent in Europe in times of austerity, cf. Campos Lima and Artiles (2013).

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