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Labour, Social Inequalities and Trade Unionism*

In recent years, the world of labour has been affected by a vast array of changes in the context of the global economy in which we live and as a result of the effects of several transnational forces and institutions. Resorting to examples from recent empirical studies carried out by the author, this article analyses and discusses the ongoing processes of change, taking as a starting point issues related to the world of labour and connecting them with the broader issue of inequality and social classes. The main aim is to make a diagnosis and a critical interpretation of some of these changes in Portuguese society, showing their relevance, significance and implications for trade unionism. Thus, after a critical reflection on the new lines of labour market segmentation and social inequality, the author points to a set of questions concerning trade unionism, offering points for further reflection and critical analysis of the experiences and problems with which it is engaged.

Keywords: Labour; trade unionism; social inequality; class structure recomposition; economic globalisation.

Introduction

This text focuses on the profound recomposition which has been taking place in the economy and in the world of labour, stressing its close ties to more overarching social change and the restructuring of classes and social inequality. Its main aim is to situate some of the issues and implications concerned as regards the Portuguese trade union movement and the new challenges which these raise in the current context of economic globalisation.

I will begin by referring to current trends in the recomposition of labour, underscoring the importance of processes of flexibilisation and precarisation of work and employment. There will then follow a discussion of some of the contours and new faultlines which emerge from the current class structure in Portugal and transnationally, bearing in mind the manifold links – between the market and the State, the economy and society, production and consumption, the objective dimension and the subjective representations of actors – which sustain the ongoing processes of change, as well as their impact in the field of opportunities, lifestyles, practices and expectations of persons and groups from different social strata. Lastly, I will debate the main issues which, following upon these processes of change, trade unionism faces today and formulate some queries and proposals aiming to contribute towards pondering trade union renewal and the modernisation of the Portuguese economy.

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1. The recomposition of work

In the past few years, several theses have emerged stressing the loss of centrality or even the end of work as a decisive value in structuring society. Celebrated authors contend that we are witnessing a disenchantment in respect to work and a relegating of the work sphere to a secondary plane. Instead, alternative dimensions of exercising citizenship, such as associativism, voluntary work and third sector areas, have been chosen as primary spheres for civic participation and factors in social cohesion and change (Beck, 2000; Méda, 1999; Rifkin, 1997). It is true that work is tending to lose its meaning as the main symbol of what *we are*, or rather, as stressed by André Gorz, work conceived of as a profession or job *we have* – or the defining core of each person's social status – is tending to fade away amongst the virtual realities of the intangible economy, becoming an ever more scarce, fluid good which it is difficult to perpetuate. However, work as a factor of *creation* or *that which is made* is far from having lost its importance. What happens is that the attributes which before connoted work with creativity and autonomy have, in a manner of speaking, been driven out of the occupational sphere. However, this does not correspond to a “liberation” of workers and much less does it translate into an expansion of the public sphere. Movable capital and the power of the financial economy, operating beyond the political sphere, have fragmented “work” as a way of disciplining the rebelliousness of the working class. But it is still the main form of subsistence, of preserving self-esteem and seeking after social recognition in a process where new forms of subjection and exploitation appear to be reviving human problems which were thought to be vanquished (Burawoy, 1985; Castel, 1998; Castillo, 1998; Gorz, 1999).

Therefore, the impact and problems which technological innovation and the so-called knowledge-based society have brought in their wake cannot but be viewed in the framework of global processes and of the new social inequalities thereby generated. The breakdown of the old Fordist wage relation, the crisis of the Welfare State, the increase in competitiveness at a global scale, especially from the mid-1980s onward, occurred as a new liberal wave emerged, largely grounded on technological innovation and the IT revolution. These trends are generating profound changes and new contradictions and social inequalities in every area of contemporary societies, with striking results in the recomposition and *destandardisation* of traditional forms of work (Beck, 1992 and 2000; Castells, 1999; Hyman, 2002; Ruyssveldt and Visser, 1996). The contrast between development poles and exclusion

and deprivation areas is now more glaring than in the past. Far from being a linear and homogenising process, globalisation is, therefore, polymorphic and contradictory. The recomposition of the labour market places skilled sectors, engaged in the new technology, side by side with situations of utmost precariousness and even of “neo-slavery.” The logic of “localisation” is the other side of the “globalisation” coin; the new forms of exclusion and exploitation are the flip-side of the new privileges and opportunities.

It is too soon to know whether the crisis in the Fordist model and its incapacity to respond to the new demands of the global markets will give way to a new production model, or whether, on the contrary, the response to the new demands can be attained through a combination of several models. The emergence of flexible production models is grounded as much on production organisation as it is on consumer markets, and represents a response to the decline in the old logic of mass production destined for stable markets. However, it is not a matter of simply passing from an industry-centred economy to a service-centred economy. Rather, we are faced with the end of Fordisms in the context of a *post-industrial* economy in which industry and services converge increasingly on their way to a complex production system, with intensive use of technology and human resources, and directed at flexibility and quality, but, at the same time, generating new segmentations and inequalities.

The fragmentation of production systems has promoted organisation models onto which, increasingly, contradictory lines of logic have been juxtaposed: on the one hand, the Fordist model remains an important space for certain sectors of activity, regions and/or countries, retaining its principles due to the fact that the process of diversifying end products has been followed through by *large-scale standardisation of processes, subsets and/or components* (Kovács and Castillo, 1998); on the other hand, the growing establishment of the lean production model in the more advanced economies, which still carries within it a number of traditional production forms handed down from Taylorism, but with the addition of new elements such as, for example, the reduction in stocks and staff, greater organisational mobility and flexibility, concern with product quality and business company culture, team work, polyvalence and, at times, an effective engagement of workers in management. Flexibility, lean manufacturing, outsourcing, delocalising the more labour-intensive production sectors to the periphery, etc., bring on a type of *internalised Taylorism* that contributes to the worsening of working conditions and the marginalisation of segments of

the less skilled work force. All of this results from a *Japanising* logic or so-called *Toyotism*,¹ which can only with great difficulty be applied successfully in Western societies and in Europe in particular (Burawoy *et al.*, 2001; Castillo, 1998; Kovács, 1998; Santos, 2004).

These processes of change in the world of labour are, as we know, phenomena which do not just express more overarching social change, but also participate directly in recomposing inequalities and the class structures concerned. Despite the obvious link between these two issues, what can be said is that, on the one hand, studies on work and employment issues rarely articulate with the theme of classes and inequalities; on the other hand, studies on class have ceased to be part of sociologists' concerns, or are only generically referred to when justifying explanatory models based on socio-occupational typologies.

2. Restructuring class and inequality

This text does not aim to discuss the multiple determinants of social class structure, nor to develop any theoretical debate hinging on the concept of class, of the loss in topicality it has undergone or otherwise, of the various dimensions which it should include, or, for example, on the importance of the cultural and identitary facets in its restructuring. It would make even less sense to pick up anew the old and unending debates on Marxist structuralism, attempting to identify frontiers or defend the primacy of any one abstract model over another. We know that class has ceased to be *the* determining fact of collective action, for social reality has become more complex and the new faultlines surrounding phenomena such as sexual, ethnic, racial and religious difference have taken on the role of areas energising identity and political struggle which compete with class, although generally in articulation with it.

Following up on previous work on these matters (Estanque, 2000, 2003 and 2004), I seek to take up again here two core ideas associated with these themes: the first is that work, the productive sphere, still is, as previously mentioned, a core element in social analysis,

¹ Originally developed by Taiichi Ohno, the engineer who, after World War II, promoted the so-called Toyota Production System, that is, a new management model grounded on principles of work process reorganisation and technological innovation, seeking to adjust management and production organisation to an international framework of growing market diversification and segmentation, oriented towards small-scale production. As is commonly known, Japanisation, that is, the application of these models originating in Japan to North-American and European businesses, has been the target of countless critiques. Despite its team work and greater flexibility, its effects have been deemed to be mostly negative because of the intensifying of production rhythms, greater fragmentation of work, extended working hours, trade union fragilisation, in sum, because of growing worker submission, growing situations of precariousness and new forms of factory despotism.

whether because it is a decisive factor in preserving societies' cohesion, or because it still is the main field where individual inequality and opportunity are organised; the second is that inequality not only continues to have its insurmountable touchstone in the economic factor but it also rests on relational structures and mechanisms – grounded on relations of interdependence and power discrepancies – tending to assure privilege and to reproduce multiple forms of oppression and exploitation.

As a result of current trends in economic globalisation and of the fragmentation of work systems, we can today invoke new lines of social recomposition having a strong impact on the restructuring of social classes. It can be said that this recomposition has implications which affect simultaneously every level of the social pyramid, from the new professional, managerial and institutional elites to the more excluded and proletarianised strata, including also the so-called “new middle classes.” It is worth situating some of the main contours of these trends in the transformation of class structures.

2.1. Subclasses and overclasses: Transnational and fragmentation dynamics

In the first place, we observe the extraordinary increase of situations of “atypical” work, to a large extent resulting from economic *globalisation*, such as precarious jobs, deregulation of labour rights, illegal trafficking in human labour (illegal migration), child labour, poverty, unemployment and underemployment, etc. (Ferreira, 2003).² These situations are located in the close interdependence between work/unemployment/the family/communities, introducing a logic of *localisation* not just in the sectors which are more dependent and where the work force is more exploited, but in a range of social categories where poverty, exclusion and oppression proliferate – that is, those who suffer the effects of *localised globalisms*, according to Boaventura de Sousa Santos's formulation (1995: 263). It is social groups of this nature which can be viewed as comprising *local subclasses*. They are subclasses because, in the light of conventional indicators, they do not possess a well-defined class position, that is, they are outside or ‘below’ the traditional working class. The case of migrant workers, for example, is a good illustration of the perverse effects of neoliberal globalisation and the way in which the latter promotes new “localised” effects. Besides the pockets of poverty and marginalisation which illegal migration helps to

² On deregulation and precariousness of labour relations, see also Ruysseveldt and Visser (1996), Beck (2000) and Hyman (2002).

consolidate, these sectors of the transnational work force, it can be said, did not become globalised, rather they were “delocalised,” as a rule remaining more fixed and territorially circumscribed, at times relegated to a state of utter dependence and subjected all types of pressure.

Secondly, at the top of the social pyramid, we see the constant flow of corporate officers of the major multinationals, top management, State institution officials, highly skilled personnel, political leaders, prestigious scientists, etc., who make up a new socio-professional and institutional elite which monopolises knowledge, skills, data, social networks, moving on a planetary scale. They keep up with and benefit from technological evolution like no one else, travel in business class and, on the same day, switch continents and take their meals in the best restaurants and hotels, separated by thousands of miles. Despite their diversity, these sectors hold in common the privilege of power and wealth, and can, as it were, be placed ‘above’ the structure of classes in its traditional sense, thus forming a *global overclass*,³ since they place themselves above the old nation-based ruling class.

The phenomena I have singled out above go hand in hand with the shift in social structures and express the multiplying of inequalities through the widening of social and spatial distances which mark the passing from the national to the transnational scale. But of course this increase in inequality does not simply mean a change in scale. Above all, it means a stupendous intensifying of levels of complexity, given the emergence of new factors of instability and new processes of fragmentation and reconversion of the different class positions which are part of the structural change in the job market, the education system, State institutions and of society as a whole. In the case of Portugal, this evolution takes on peculiar contours.

Thus, where class structure in Portugal is concerned, social and labour changes over the past three decades have led to very significant alterations, which bring new difficulties to the old models of trade union action. Many of these phenomena have already been left behind in the more advanced European societies, but have only made themselves felt in Portugal over the past decades:

³ Some authors, such as Leslie Sklair, analyse the growing importance of the *Transnational Capitalist Class* (Sklair, 2001). This concept drew further inspiration from authors such as P. Evens (1979), Becker and Sklar (1987), Santos (1995: 252-268 and 2001: 31-106) and Lash (1999: 19-20).

1. New, internal divisions within the ranks of wage workers – between manual and non-manual workers, between technocrats and bureaucrats – as a result of technological evolution in industry, of the professionalising of management, of the growth in the public sector, etc.
2. Increased rates of social mobility within the frame of the growing tertiarisation of society, which in turn results from the set of structural changes in large measure brought in by European Community membership, with clear impact on the employment structure and on the processes of litoralisation and urban concentration.
3. Growing internal differentiation of the salaried *middle class*⁴ and new tensions and faultlines within it, with the emergence of new occupations and professions – sectors in decline overlapping with emerging sectors – creating new forms of closure and different lifestyles.
4. Increased union membership in some segments of the middle-class to which I have referred, which is linked to increased institutionalisation of trade union structures and neo-corporatism, and the growing fragility of working class-based trade unionism.
5. New patterns of class formation and growth of new faultlines and new forms of polarisation, of a post-Fordian and post-industrial type, notably with the appearance of proletarianising phenomena in the service sector.

⁴ This concept has given rise to ample polemical exchanges within the social sciences since the beginning. Marx attached little importance to it, since he believed it was a matter of “transition classes,” preferring to stress what he judged to be the growing dichotomy of the class struggle between the bourgeoisie and an ever more homogenous proletariat. In turn, Max Weber and his followers perceived that, on the contrary, with the development of capitalism, it would expand, as the heterogeneity of the working class and the phenomenon of social mobility also grew. I do not propose to take up this debate here, but it is worth noting that the “middle class,” especially when considering wage workers, is defined in negative terms. That is, especially since the mid-20th century, the middle class began to be regarded as corresponding to the diverse work force sectors who are not blue collar, as the literature came to define the old manual working class, nor, obviously, the ruling class. Thus, in a broad sense, we refer to the middle class when discussing office workers, public and private sector staff, bureaucrats and technocrats, teachers, the technical professions, middle level personnel and skilled workers, etc. Such a diverse set of workers is not and has never been a “class” in the real sense of the term, but rather a somewhat nebulous “smudge” situated somewhere between the elites and the poor, or between the ruling class and the manual working class. It has also been named “the new working class” (Mallet and Gorz), “new class” (Gouldner), “new petite bourgeoisie” (Poulantzas), “contradictory class locations” (Wright) or even “service class” (Goldthorpe; see below, note 15). Many consider that these sectors are above all holders of individualistic values and at times operate as a type of “buffer zone” which works to absorb the impact of structural conflicts and the class struggle. See, among others, Dahrendorff (1982), Giddens (1975, Goldthorpe (1969 and 1995), Wright (1983) and Estanque (2003).

6. The emergence of new modalities of collective action and new social movements, with significant impact in the cultural and political fields, as a rule associated with youth cultures and “middle-class radicalism” (Butler and Savage, 1995; Eder, 1993; Esping-Andersen, 1993; Melucci, 1996; Parkin, 1968; Touraine, 1969 and 1981).

These trends of class structure recomposition have taken on a number of peculiar contours in Portugal, both in respect of new class faultlines and where subjective attitudes and participation are concerned. It is important to situate these aspects because they are directly related to the processes of recomposition of labour and to the new challenges which rise to meet Portuguese trade unionism.

In studies carried out at the Centre for Social Studies on social classes in Portuguese society (Estanque and Mendes, 1998) and on what I have named the *middle class effect* (Estanque, 2003), it was possible to show some of these contours based on empirical evidence. For example, in the mid-1990s, the category of “proletarians”⁵ corresponded to 46.5% of the actively employed population, of whom about 24% worked in the public sector. This means that a considerable number of wage workers in the service sector – considered, as a rule, as part of the salaried middle class – is situated here in a segment which is significantly resource-deprived, proving that tertiarisation does not simply mean a “swelling” of the middle class, but rather a reinforcement of the proletarianised strata, which appear to be on the increase also in the tertiary sector. In fact, this research proved the sparse percentage of wage workers in these intermediate categories within the entirety of the active Portuguese population. For example, skilled and semi-skilled high-level personnel and leadership cadres did not account for more than 5.6% of the population, and the remaining intermediate sectors (holding few qualifications and lacking authority, sometimes designated as “contradictory class locations”) amounted only to 11.5%, which means a total percentage of about 17% of the actively employed (with the exception of the self-employed).⁶ Mention must also be made of the fact that the vast majority of these

⁵ Which includes not just the unskilled industrial work force but the entirety of the segments of the work force reduced to the most precarious state, that is, lacking authority and significant skills. It should be noted that the structural criteria used in these studies, based on Erik Olin Wright’s neo-Marxist analytical model, did not follow the traditional typologies of social stratification theories, choosing instead a typology based on a combination of *property* resources, educational resources and *qualifications; organisational* or authority resources. See Estanque and Mendes (1998: 66-72) and Wright (1985).

⁶ If these were included, we would have, in the first study (Estanque and Mendes, 1998), a total of 27.3% of the active employed population, and if, to top this, we were to add the independent workers in the agricultural sector (12.4%), the net result would be 39.7% for the class positions which could, broadly speaking, be included

“contradictory” (or middle class) locations found employment in the State sector of the economy. It is true that the results obtained some years later, ensuing from the International Social Survey Programme (ISSP) surveys, based on identical criteria, showed relative growth of the intermediate categories holding more qualifications and a reduction in the proletarian category.⁷ However, both the intermediate personnel in positions of authority, such as, for example, supervisors, still counted for far less in percentage terms than those of other countries used as a means of comparison.⁸

2.2. The effects of State action on the segmentation of the middle class

The salaried middle classes and their greater or lesser weight in the socio-occupational structure undoubtedly represent an invaluable indicator with which to measure the level of modernisation or technological development of each society. As is well known, State and government policies have a very relevant role in this domain. We have but to consider that the entire legislative and institutional apparatus which the State sets up produces and reproduces multiple forms of interdependence between State action and the broader economic life, be it in the more State-based or in the more liberal economies, as has already been demonstrated by several authors. The State and the market have always been essential factors in rationalising social systems. Hence, the main societal structures are permanently under the direct or indirect influence of these two pivotal pillars of social regulation (Jessop, 1990; Offe, 1984 and 1985; Santos, 1990 and 1994).

Interference by State action and its capacity to promote structuring of productive activity may be direct or indirect and may take place via multiple channels. Examples of this, over and above actual legislative measures and labour law, are scientific and technological

in the so-called middle class. This would in fact be an exaggeration, especially if we take into account that, beyond the fact that “independents” are actually very often dependent, the Portuguese agricultural sector itself still remains to a significant degree at subsistence level and, therefore, is to be found closer to the “proletarian” condition, that is, it is difficult to tell it apart from the manual working class.

⁷ In this second study, based on a survey applied four years later, class categories underwent slight aggregations in the typology used, but even so, it can be said that the sum of the intermediate categories of wage workers corresponded to about 24% of the active population (also excluding independent and semi-skilled workers) (Estanque, 2003: 82).

⁸ The International Social Survey Programme (ISSP) refers here to 1999 data and included the project on Portuguese Social Attitudes carried out by the Institute of Social Sciences (ICS) (Cabral *et al.*, 2003). The countries under comparison in this case were Sweden, Canada and the Czech Republic. The previously mentioned study gathered data in 1995 from a sample of the employed active population, and its results are published in Estanque and Mendes (1998). The countries compared in this case were Sweden, the USA and Spain.

research policies, collective bargaining, workplace inspection, applying European directives, health, hygiene and safety at work measures, or, further, on a more general scale, education and vocational training policies and, of course, economic and employment policies. The effects of such measures stem not just from the State's coherence and regulatory capacity, but also, obviously, from its interaction with market dynamics in each economic cycle.

For example, in the current scenario of contraction and economic crisis, the neoliberal orientations which have prevailed in world and European contexts – with intensifying competition coming from Asian countries and the processes of delocalising businesses, of privatisation and restructuring in the most varied domains – have had obvious repercussions both in employment supply and in the type of labour contract, with direct influence on the greater or lesser degree of security, stability or precariousness. These processes translate into movements of expansion or contraction of different categories of the work force, acting as factors of risk and instability among various occupational sectors, administrative, technical and specialised staff of different types. This results in constant repositioning between segments, especially as regards those that occupy the social space of the salaried middle class, making some enter into decline and lose status, proletarianising them, and causing others to gain ascendancy and strengthen their position in the struggle for consolidating or for achieving a status compatible with desirable lifestyles.

Thus, the weight of the State in structuring the Portuguese “middle class” has operated alongside more in-depth social processes of recomposition and structural change in the job market. These processes have been redesigning new faultlines and segmentation of the working class taken as a whole, and especially between the different fractions of the middle class. It can even be said that a struggle is unfolding for the monopoly and redefinition of status positions among these different fractions, with gains and losses for some over the others. In fact, correlated issues of this debate, such as social mobility and meritocracy, are nowadays very problematic, since closing-off mechanisms are extremely powerful, generally succeeding in supplanting the criterion of “merit.” And even those (few) who attain elite positions by their talent “close the door behind them as soon as they attain their status. Those who get there through ‘merit’ start to want to have all the rest – not just power and money, but also the chance to decide who is allowed in and who remains outside” (Dahrendorff, 2005).

The middle class as a whole not only displays dubious contours and was never effectively very large in Portugal, but it appears in actual fact to have fallen into decline. In other words, as mentioned above, the reinforcing of the middle class is more apparent than real,⁹ especially if attention is paid to the fact that a significant number of employees in the tertiary sector (State or otherwise) are close to the proletarian category, at least according to the structural criteria considered in the above-mentioned studies. Over the past few years, within the framework of liberal policies and the ongoing economic crisis, phenomena such as family indebtedness, the weight of illegal work and of freelance work, with all the array of situations of abuse of power and the intensifying of productivity pressure, appear to have worsened and currently affect wide sectors of the work force, including the middle class, be it in public services or the tertiary sector in general, enhancing relations of dependence, precariousness and *de facto* proletarianising. This does not, of course, make it less important to reflect on the phenomenon.

It is pertinent to recall here the classic concept coined by João Ferreira de Almeida (1986), the so-called *escalator effect*, which points to the delusions created on the subjective plane when certain groups move from the lower or middle steps of social stratification to the steps above, losing sight of the fact that the higher steps have in the meantime moved similarly. In addition, the very effect of the *reference group* – especially because it works as a standard for comparison measuring the social condition of individuals by referring to other groups in the same situation or even lower (neighbours or relatives, for example) – broadens the meaning of relative deprivation and thus renders illusive the degree of proximity, or of progression, on the stratifying scale among different fractions within the middle class or those on its fringes (Parkin, 1979).

These trends in the restructuring of inequalities do not mean that Portuguese society is moving gradually from an agro-industrial model to a services society based on the new technological resources and on the new forms of knowledge and communication; rather, they express the enormous complexity of a society in *problematic transition*, riven with multiple contradictions and strong social inequalities, which appears to *push down* some of the work force sectors which had apparently already detached themselves from the old, impoverished condition in which they found themselves. The old faultlines are in place, with new ones now being added on.

⁹ Involved in this is the issue of identification with the “middle class,” which I will address below.

To the classic contradictions between manual work and employment in the third sector, between workers and employers, between rich and poor, the excluded and the included, women and men, etc., we must now add the new inequalities of the era of globalisation, between skilled and unskilled, info-included and info-excluded, stable job and precarious job, graduates and non-graduates, Portuguese nationals and immigrants, legal and illegal workers, the majority and ethnic or sexual minorities, and so on and so forth. At the same time, the social and economic crisis which Portugal has experienced in the past few years, with the delocalising of businesses, the rise in unemployment, the fragmentation of work and the multiplication of precarious work contracts, changes in labour laws, the increase in “flexibility,” among others, are factors which have been enhancing precariousness and contributing to generate new, proletarianised sectors, both those associated with old occupations in the industrial sector, as well as some of those to be found in the so-called middle class (Esping-Andersen, 1993; Estanque, 2003 and 2004).

2.3. Inequalities and class identification

Since, as is well known, Portuguese society is still considerably characterised by the importance of the industrial sector, it is worth referring to some of the contours and specificities of one of this country’s paradigmatic industries (footwear) and the asymmetries which remain in this industry as regards the configuration of inequalities. When conducting a comparison between class structures at national level and in the footwear-producing region – based on a survey centred on the area of São João da Madeira (Estanque, 2000)¹⁰ – I found deep social contrasts between the country and this region. From the example of the footwear industry in this region we can better understand some of the social contours which characterise the more traditional sectors of the Portuguese economy.

Indeed, the results obtained illustrate well the working conditions which continue to prevail in this region of diffuse industrialisation. The immediately striking feature is that middle-class positions – which, as has been shown, were scarcely representative at national level – virtually disappear in this region. The more skilled categories of the work force go from 0.3% to 0.7%, that is to say, the so-called “middle class” virtually disappears in this region, whereas the “proletarian” category jumps dramatically to 60.2%. Market forces and

¹⁰ Which in this case was based on a sample of the active population, applied in the municipalities of São João da Madeira, Oliveira de Azeméis and Vila da Feira (Estanque, 2000).

individual competition among workers join with a traditional cultural matrix, marked by economic scarcity and by symbolic references to the rural world. There is a permanent convulsion in the managerial fabric in the footwear sector, mostly made up of micro-businesses, whose owners are almost exclusively former workers. This survey compared two generations: that of the respondents and that of their parents. It shows high social mobility flows, side by side with high rates of social reproduction: for example, in the employer category, 28% also had parents who had been employers, but 44% of respondents' parents had been proletarian; in turn, the parents of 70% of proletarian respondents had also been proletarian, but the parents of 22% of respondents had been employers. Thus, as regards this objective component of the analysis, the survey showed that, taking a global view of the class structure of the two generations under comparison, the logic of inequality remained virtually unchanged, that is, despite the significant rates of individual mobility (from top to bottom and from bottom to top), the configuration of class positions in both generations displayed virtually no change.

We may well ask to what extent these structural inequalities interfere in subjective representations. The surveys mentioned previously (Estanque, 2000 and 2003) also made it possible to determine the degree of consistency between objective class positions and respective orientations regarding society and class identification. In addition, they supplied important indications with respect to perception of the antagonism and conflict of interests experienced (which I will examine in section 3 below).

The comparative survey between the region of São João da Madeira and the Portuguese working population (Estanque, 2000) disclosed that, despite the greater presence of proletarianised sectors in this region, subjective attitudes were clearly more optimistic and less critical of the social and economic system. This was the case of all the class segments, including those enjoying fewer resources. From evaluations regarding the improvement or worsening of the family's economic situation in the previous ten years, to expectations with respect to the immediate future, through perceptions regarding the possibility of workers participating in the choice of leaders or regarding reasons behind poverty,¹¹ in every item

¹¹ Merely as an example, one of the statements carrying an emancipatory thrust which was presented to respondents was "If possible, workers should participate in choosing directors and managers." This garnered the agreement of 68.4% of the countrywide sample and only 55% of that of the region. The "proletarian" category agreed at 71.4% countrywide, and 60.6% at regional level. Another of the statements, of a conservative/liberal bent, was as follows: "One of the main reasons why there is poverty is that poor people

responses from the sample in this region displayed a greater degree of optimism when comparing the present to the past and in respect of expectations for the future and a greater degree of attachment to liberal and conservative principles. On the other hand, where class identification was concerned, many workers in this region, including part of the “proletarians,” regarded themselves as members of the “middle class” – mention must be made that most industrial workers in this sector earn the equivalent of the minimum national wage – and tended to express opinions on society and labour relations which very often coincided with managerial ideology.

In respect of subjective identification with the “middle class,” the survey under consideration developed under the auspices of the ISSP showed that, in Portugal, about 37% of “proletarians” identified as members of the “middle class” (combining the lower-middle, middle and upper-middle sub-categories) and the same applies to 52% of employers (Estanque, 2003: 100). It is precisely this attracting principle which makes the notion of the middle class a major reference in the representations of the Portuguese.

The conclusion can be drawn that the asymmetries and inequalities existing in Portugal, besides being grounded on enormous discrepancies in opportunities and standards of material well-being, promote models of subjective representation, expectations and labour relations which clearly show the power of the oppression established over the more dependent and precarious segments of the work force. Paradoxically, it is the situations where exploitation mechanisms are most notorious, where the contrast between wealth and poverty is more stark, which appear more greatly to contribute to the manufacturing of “consent mechanisms” (Burawoy, 1979 and 1985), no doubt grounded on powerful systems of control and micro-ideologies of a feudal nature, tending to legitimise inequalities and the prevailing status quo.

3. Subjective perception of conflicts of interest: Resentment and acceptance

This may appear paradoxical, but the above-mentioned tendency towards consent on the part of the Portuguese is not incompatible with a deeply-etched notion of the existence of conflicts of interest. The surveys I have referred to show that Portuguese society has a

are not intelligent enough to compete.” This garnered, in all, the agreement of 53% countrywide and 85.7% at regional level. The “proletarian” category agreed at 53.8% countrywide, and 87.4% at regional level. For a detailed analysis of these results, see Estanque, 2000, 209-240.

sharply-defined sense of the presence of very significant conflicting interests among all the polarisations under consideration, namely between rich and poor, between the middle class and the working class, or between workers and managers (Cabral, 1997 and 2003; Estanque, 2000 and 2003).

If we examine the faultline between the working class and the middle class, for example, we find that the Portuguese consider it of great importance, since 63.2% indicated the existence of “strong” or “very strong” conflicts of interest between them (Estanque, 2003: 94). Not only are the standards of living of each of these categories (the working class and the middle class) seen as diverging, but in addition a symbolic struggle for demarcation lines between the two can be inferred. This tells us something about what I have called a *middle class effect* as a symbolic and social reference in the Portuguese imaginary. This is an “attraction” effect, which expresses the fact that subjective identification with the “middle class” tends to spread beyond the (objective) limits of this stratum. This may help interpret the perception of interests between the working class and the middle class as conflict-riven. There appears to be on the subjective plane a struggle which plays out in two directions: from the viewpoint of those who already consider themselves to be part of the middle class, and who thus show their difference in status; and from the viewpoint of those who identify as working class, who thus show the difficulties in attaining a position in the middle class.¹²

The conflict between management and workers was the feature to which most respondents pointed as relevant (87.8%). Over and above all other considerations, this proves the centrality of labour relations as a field in which inequality is structured, both in objective and subjective terms. The rapid restructuring of the production fabric in Portugal, together with the presence of traumatic experiences in the trade union struggle in the recent historical past, means that today, despite the growing fragility of trade unionism, subjective representations denote strong social faultlines structured around work conditions, despite the fact that current precariousness trends inhibit open expression of labour conflicts.

These signs should be interpreted in tandem with the already classic idea which points to the *distance from power* as one of the more obvious features in Portuguese society (Hofstede, 1980). That is to say, the Portuguese tend to have high levels of tolerance when

¹² A reading that derives inspiration from the concepts of *exclusion strategies* and *usurpation strategies*, developed by Frank Parkin (1979).

faced with power and status discrepancies. The perception of antagonism across society, however, does not mean an intolerance of power and status discrepancies, but perhaps the idea that there are well marked-off positions as regards (symbolic and material) opportunity and privilege. Objective inequalities appear to spread out on the subjective plane, mirroring significant levels of relative deprivation among the Portuguese.

We know that, in the labour sphere, the high level of tolerance which subordinates accept with respect to the exercise of authority by hierarchical superiors facilitates every type of abuse. On the one hand, those who fill prominent posts and leadership positions demand endless devotion from their subordinates. On the other hand, subordinates themselves, either because they lack alternatives or because they hope thereby to gain some return, very often allow themselves to be caught up in a logic of resignation, fed by feelings of unconditional loyalty, thus enlarging their superiors' resources and authority. Hence, when these ties of affinity and dependence shatter and the weaker party begins to invoke rights, violent reactions very often erupt, be they personal or institutional, more blatant or more subtle, giving rise to psychological violence and moral harassment in the workplace, and even to physical violence (as can be gleaned from the number of lawsuits brought to court).

The divisions existing in Portuguese society and in the world of labour are thus an expression of entrenched social barriers. However, there is a need to stress the growing importance of precariousness. It is at the same time an objective reality and a subjective feeling. Employers' viewpoints deliberately equate precariousness with "flexibility" – because the latter means, as actually practised by business, a reinforcing of the exercise of power over workers, which forces them to accept everything, to accept the hierarchy's orders without protesting, even when they are relegated to performing tasks for which they do not feel qualified or which affront their qualifications and status. But precariousness, being also a subjective feeling, translates into impotence and fear. And incorporating fear in turn gives way to acceptance or resignation, that is, to self-denial in the struggle for rights.

Against the current backdrop, and especially when the salary relation is precarious, workers know they can be discarded at any moment. Hence the withdrawal, the subjective flight mechanisms, the mental evasion, the fear of retaliation, and so on, which, although fostering an overall feeling of unwillingness at work, translate into a refusal to take part in union activism and other forms of group action – even though, as we should recall, these cultures of resentment conceal in everyday industrial life a multiplicity of tacit forms of

resistance and subversion vis-à-vis disciplinary mechanisms, in the form of power games which are almost invisible but of great sociological relevance, as I showed in a research study carried out in a footwear factory involving participant observation (Estanque, 2000). Indeed, although contained within a subjective logic of high levels of tolerance, labour relations in these environments can turn into deregulated conflictuality, with unpredictable outcomes, especially if the standard of living dips suddenly beyond the margins of tolerable *relative deprivation*. And it is as well to remember that the margins of tolerance are lower where State intervention is greater and the salary relation more stable. If, for certain sectors, the principle of regulation follows socio-cultural grounds rather than the legal framework, what can be expected is that a recontractualising of labour relations based exclusively on the market principle will legalise the inclusion/exclusion duality, ushering in situations of *de facto deregulation* (Ferreira, 2003: 130). According to a recent study, Portugal is, with Brazil,¹³ one of the countries where the following ideas are most prevalent: “You have to be corrupt to get anywhere in life” (40.7% agreement), or “Inequalities exist because they benefit the rich and powerful” (80%), or, yet again, “Inequalities continue to exist because people don’t come together to fight them” (69.6%) (Cabral, 2003). These findings clearly show the presence of feelings of impotence and resentment associated with the heightening of precariousness.

It is, however, important not to forget that subjective attitudes have their main source in concrete reality. Indeed, increased precariousness and flexibilisation in labour relations such as fixed-term contracts, subcontracting, home-based work, the growth of illegal networks of international work force mobility and an entire set of atypical and/or illegal forms of work, have all been contributing to heighten new forms of discretionary power, new forms of despotism, exclusion and oppression in the workplace. The factory systems in place in most Portuguese industrial companies are but the tip of the iceberg, for authoritarianism and forms of violence in the workplace are to be found virtually in every employment sector. And neoliberal globalisation has contributed to heighten the situations of oppression, exploitation, precariousness and dependence which today characterise the world of work.

¹³ The other countries included in M. Villaverde Cabral’s analysis are Canada, Spain, the Czech Republic and Sweden (Cabral, 2003).

4. Challenges facing trade unionism

In view of the above, I aim, in this last section, to point out some of the implications of these processes of social change – in the world of work, in the restructuring of class inequalities and on the plane of subjective attitudes – for collective action and trade union action.

As is well known, the trade union movement has tended to become less predominantly working class-based, as societies become tertiarised, and this is a trend also found in Portugal. But it is important to recall the historical role of the working class movement, since it was this movement which, at least until the 1960s – and in the case of Portugal, until more recent times – fed the social bases of trade unionism, and it is that reference and that memory which continues to underlie the discourse and proposals for action of a significant current of Portuguese trade unionism. It can be said that this conception still rests upon a vision of the world of work anchored to the old class contradictions, handed down from the Marxist structuralism which was hegemonic in public discourse in the period after the 1974 revolution in Portugal.

4.1. The decline of the working class

It is now unanimously acknowledged that this vision ceased to be adequate to describe the reality of the world of work. In other words, even though the social classes structured from within the production sphere continue to be the main underpinning of inequality, it is a fact that, as almost every study confirms (Estanque and Mendes, 1998; Pakulsky and Waters, 1996; Wright, 1985 and 1997), class has long since ceased to be the main determining factor of political conflict. Against a backdrop of increasing globalisation and individualisation of social relations, class faultlines simultaneously produce conflicts of interests and *consent relations* within the sphere of production, be they grounded on hegemonic or despotic regimes (Burawoy, 1985). If, up to the 1960s, the class struggle led by the working class movement in the industrialised countries was deeply imbued with social and political meaning, this was because there were conditions within which to build strong working class cultures, in the shape of communities of resistance or emancipation, which in the meantime have faded away or become quite simply extinct. The traditional Taylorist production system and the Fordist regulation model began to split and to fragment, causing new forms of work to emerge which were more deregulated and

included in a social framework more intensely characterised by the tertiarisation of employment and by the expansion of mass consumption.

The Portuguese case, however, displays singularities which it is important to examine. Most strikingly, late and incipient industrialisation and a Welfare State which was only able to expand in the period after the 1974 revolution. The full affirmation of the Portuguese trade union movement occurred in a revolutionary context in which class language hegemonised public debate and mass movements became the main source of political legitimacy. On the one hand, a Marxist discourse focused on a model of socialism which seemed to be just around the corner, guided working class struggles in the second half of the 1970s, and under the strong influence of the far left and the Communist Party the power of CGTP-Intersindical [General Confederation of Portuguese Workers] was consolidated. On the other hand, reformist trade unionism emerged with UGT [General Union of Workers], which took a stance opposed to that of CGTP (an initiative taken by the two major parties in power, the Socialist Party and the Social-Democrat Party) following the victorious struggle against the system of single unions, and began to gather support in the service sector and later in other sectors, presenting itself as the partner of choice in social dialogue. In a context of deep political-ideological faultlines entrenched from 1974-75 onward, divisions on the trade union plane developed, in large measure, as a reflection of party political activity and subsequent vying for hegemony within the structures of each of the union confederations. This process, incidentally, is still ongoing and has gained new contours as trade union difficulties grow in face of the need for new responses and for consolidation of greater autonomy as regards political party influence (Castanheira, 1985; Cerdeira, 1997; Costa, 2004; Lima, 1991; Lima *et al.*, 1992).

With the loss of vitality of the old model of union action centred on mobilising the working class – and especially with the growth of the tertiary sector, that is, the so-called *service class*¹⁴ – there was a progressive fall in trade union membership rates. But in the sectors of administrative services and civil service, as also in banking and insurance, this fall was less significant than in industry (Cerdeira, 1997). At the same time, growing prominence

¹⁴ The concept of *service class*, inspired by David Lockwood's approaches (1966), was formulated by Erikson and Goldthorpe in the following terms: "employees render service to their employing organization in return for 'compensation' which takes the form not only of reward for work done, through a salary and various perquisites, but also comprises important *prospective* elements – for example, salary increments on an established scale, assurances of security both in employment and, through pension rights, after retirement, and, above all, well-defined career opportunities" (Erikson and Goldthorpe, 1992: 41-42)

on the institutional plane gave the trade union movement a new role in designing the major social reforms, a process which unfolded in conjunction with its loss of capacity to mobilise workers. It can be stated that, over the past decades, the acquired rights of workers and the trade union movement gave way, in practice, to the pressures of cooptation, becoming part and parcel of the very dynamics of the system. In other words, they were absorbed into the logic of regulation, now being part of State activity itself (Santos, 2001, 2004). In effect, the institutionalising of collective bargaining and trade union participation in the processes of social negotiation and dialogue, mainly from the 1980s onward, favoured the development of a logic of neo-corporatist¹⁵ action on the part of many unions. This means that, in practice, the strength of the apparatuses has become all the greater as the room for manoeuvre of union members has declined. Such situations have contributed greatly to inhibit participation and to hinder the spreading of trade union discourse and activity throughout society and the weaker segments of the work force.

Thus, it can be said that the hesitations, difficulties and dilemmas found in Portuguese trade unionism are directly linked to the processes of class fragmentation I mentioned above, especially those which are bringing about new differentiations among fractions of the middle class – civil servants, teachers, bank staff, doctors, nurses, judges, etc. – whose struggles with respect to careers, working conditions and professional status interfere with the organisational processes and proposals of trade unions taken as a whole. Although still in the militant garb of a form of trade unionism which took on the role of mouthpiece for the working class, in the name of its mythic unity (whose foundations point to the defense of the political interests of the working class vanguard), the aims and bargaining capacity are in fact an expression of struggles to defend the interests of “professional class” A or B. The diversity of rationales and forms of action in the trade union field is thus ever more clear. It is the result of the drastic segmentation of socio-occupational categories, types of contract, qualifications, precarious links, in a word, of the overall instability which has characterised the world of work in these past years.

Trade unionism remains strong in some sectors of public service and of services, not because a “class” discourse of resistance persists – unifying the working class as a whole only

¹⁵ Structured from negotiation and the compromise between State action and associations, in the name of the national interest. With regard to debates on neo-corporatism, see Lucena (1985), Offe (1984) and Schmitter and Lembruch (1979).

insofar as appearances are concerned – but because it very often rests on the defense of particular interests whose success is mainly due to the capacity for bargaining with the political power structure, as well as to the strength of the pressure groups which support it. Many trade union leadership structures, most especially in the middle class sectors where State expansion was greatest, tend to devote more time and resources to defending the more stable segments, to providing services, to making available legal support and other technical activities, than they do to pondering and reflecting on the structural problems of employment or to triggering action strategies directed at defending the more precarious sectors of the work force. While the latter discontinue membership or never take out membership, those groups which can still rely on job security, albeit ever lessening, retain significant influence and bargaining power. These phenomena have, incidentally, been identified within several international contexts and converge with issues related to employment policies and the restructuring of the labour market in the current context of the global economy, presenting trade unions with new challenges and difficulties (Ashwin, 2000; Bezuidenhout, 1999; Castells, 1999; Costa, 2005; Estanque, 2004; Frege and Kelly, 2004; Hyman, 2002; Herod, 2001; Moody, 1997; Murillo, 2001; Waterman, 2002).

4.2. The new questions posed to trade unionism

Against this negative backdrop and the growing stagnation and weakening of trade unionism, what responses is the trade union movement able to offer? How will the leadership structures of the Portuguese trade union confederations react? Is there space for real renewal which will create a “new” social trade union movement embracing the global or transnational scope? Do the signs of the ongoing opening up and attempt to transnationalise mean that the forces of renewal will find it possible to carry through the re-invention that the trade union movement needs? What outcome can be expected from the internal contradictions that exist in each of the two major Portuguese confederations? Given these difficulties, can we hope that CGTP and UGT will draw closer?

The prominent role of the trade unions as forces mobilising against economic liberalism now finds potentially fertile ground for the social struggles of the immediate future, in a climate of social and economic crisis which warrants our concern. But society demands far-ranging renewal of them. Faced with the growing might of global capitalism, the need to renew action-taking methods and strategies and to rethink the unity of trade union action

on new premises is an urgent task and a priority. However, the more orthodox currents cling to a crystallised dogmatism and seize every means to resist any critical thought, even though the labour reality of our times demands new strategies, alliances and methods of intervention.

Trade unionism can only gain expression and reinvigorate itself if it is able to think about work and its problems at the beginning of the new century by taking into itself the most up-to-date knowledge available in this field and grounding its discourse on it. Faced with a social world of growing complexity, at a time when the pathways of the future are so uncertain, there is a need to dare to challenge the dogmas and certainties which are still entrenched. Raising doubts and formulating new questions, grounded on the new reality, is a first step.

The questions posed below do not, obviously, set out to act as a script or to outline any trade union and political action programme. This will have to be drawn up by the relevant actors. However, the standpoint of researchers and their distance from the issues which engage trade unionists on a daily basis afford greater objectivity and may help promote debate and raise polemical issues. The following questions aim to do no more than this.

Should the unions go on investing in the old, class-based trade unionism, or attempt to expand collective action to a trade unionism of movements, forging an alliance with the new social movements? Should they continue to centre mobilisation on the sector and national planes, or increasingly promote action-taking based on transnational solidarity networks? Should they go on believing in a future model of society wrenched from the spoils of the current system, or work within that same system to create alternative areas for social organisation and emancipation? Should they work jointly with worker committees and promote their democratic election, or simply work with them when they become an instrument of the union? How can union leadership strata be renewed, promoting the defense of internal democracy and younger union members, making use of their critical capacity and their militant activism? How can women be represented and how can they be afforded access to leadership positions, since we live in one of the most feminised European countries where labour is concerned? Should resistance among worker collectives be privileged or should intervention and discourse be opened up in a propositive and proactive sense? Should Union action concentrate on the more stable sectors, which have greater bargaining power, or should action be spread to and intensified among the most precarious

labour segments, who are also the most difficult to mobilise? How can negotiation be combined with organised struggle? How can unions combine involving workers in union demands for rights with institutional means of action-taking both within the legal and court framework and the labour inspection system? How can action be taken within particularly precarious sectors such as those of immigrants and the long-term unemployed, for example? Should unions continue to thrust Union hegemony on civic movements and associations or should they exert persuasion and make concessions where these are called for? How can economic and labour struggles be combined with struggles for recognition promoted from within the community? These are some of the questions which, in view of the current social and labour climate in Portugal, merit serious consideration by trade union leaders.

On the other hand, on the economic plane, renewing the Portuguese labour fabric demands an ever more consistent policy where collective bargaining is concerned, contemplating strategic objectives for the country, involving political power, employer confederations and trade union structures. The current conjuncture appears to favour putting this strategy in place. The difficulties of reconciling the defence of social cohesion and labour rights with business and economic competitiveness are well known. But the effort to be expended, in a context such as that of Portugal and Europe, can only move in this direction. There is an entire set of interconnections between apparently conflicting objectives, but which, in my view, should, indeed must, be made compatible.

Offered as examples, I list the following strategic objectives:

1. Programmes for business companies' technological innovation and social aims.
2. Competitiveness and full engagement in training persons, both in the context of vocational training and in the continuous training of workers and cadres.
3. Technological innovation and organisational innovation with flexible and participatory management models.
4. Management efficiency and worker motivation based on delegation of responsibilities, recognition of merit and team work.
5. Scientific research activity at the level of universities, laboratories and other institutions based on programmes of technological innovation and industrial modernisation developed in the business companies or coordinated by business associations.

6. The pursuit of excellence and respect for workers' trade union rights and freedoms, creating true cultures for conflict negotiation at business company level.
7. Strategic planning and flexibilisation which will safeguard labour citizenship, especially through tax incentives for good practice in management and innovation.

Conclusion

The Portuguese labour market and society are undergoing great turmoil and today face well-known difficulties that result largely from the recompositions and changes set in motion by the global economy in which we live and by the social and institutional pressures played out transnationally. To that extent, the analysis I have sought to outline in this text is designed, above all, to act as a contribution towards our understanding of the enormous complexity and the countless social contrasts which currently permeate the world of labour in Portugal. The processes and trends I have discussed here have made it possible to show the need to promote critical and up-to-date knowledge of the connections between work and social inequalities, with a view to accounting for the new contradictions and problems which have been emerging in the past few years. More than providing a systematically and empirically grounded diagnosis, I have sought to summarise a set of interpretative hypotheses and raise a number of possibly controversial questions, above all aimed at promoting debate and addressing the social actors, especially the trade union leaders and activists who, in a terrain which is difficult and run through with numerous obstacles, fight for a more dynamic trade unionism which can meet the challenges now facing the Portuguese economy and workers.

The overall instability of the labour market and the multiplying of work forms and ties in the past few years have drawn new demarcation lines in social inequalities, increasing factors of risk and precariousness among worker strata situated in varying status and class fraction positions. These new dynamics and faultlines assert themselves in very heterogenous (individual and collective) practices and subjectivities, be it with regard to work and social life in general, or with regard to trade union activity in particular. Indeed, the field of labour has changed to such an extent that we are very often confronted with the more visible effects of such change without being able to discern the structural and sociological nature at its root. It is not infrequent for economic agents and trade union

actors to face the present from the viewpoint of immediate objectives and act from perspectives grounded on paradigms that are no longer applicable to concrete social reality.

To conclude, I have sought in this text to underscore the close interdependence between labour issues, social inequality and the challenges of trade unionism. Responses to the questions raised can only meet with success if they are faced in the light of the most profound social dimension in which they lie. And awareness of this dimension from a critical perspective requires the assumption that, beyond growth, the economy can only truly bring development if its dividends are supported by distributive policies guided by the search for general welfare and the reduction of social inequality and injustice. It is from this point of view that trade union reinforcement and democratic revitalising become pivotal elements in the revitalising of democracy itself.

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