

Organization and Representation of Informal Workers in São Tomé and Príncipe: State Agency and Sectoral Informal Alternatives

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Abstract: In São Tomé and Príncipe, both the size of the informal economy and the scope of the mechanisms of organization and representation are little known. A research conducted recently showed that the almost always limited and irregular incomes generated in this sector are also associated with precarity and a lack of social protection mechanisms. While initiatives led by the state and supported by international funders positioned unions as privileged organizations for representing and supporting the workers in this sector, the limited results generated opportunities for the creation of sectoral bottom-up initiatives. The discussion is then focused on the areas addressed by the initiatives of specific sectors and types of activity – taxi and motorbike drivers and money exchangers – comparing the outcomes with those of the unions in terms of increased social protection and representation.

Introduction

The size of the informal economy of São Tomé and Príncipe, an insular microstate of the Gulf of Guinea with less than 200,000 mostly urban inhabitants, has never been accurately measured.¹ However, most of the estimates and perceptions about the informal economy, as compared to the formal economy, point to its preponderance, in proportional terms, in the set of income-generating activities of the population. According to the National Institute of Statistics (INE), data collected in 2013 on the active population indicates that 62 percent were working age (resident population of fifteen or more years). The unemployment rate is estimated at 13.6 percent, reaching 19.7 percent of women and 9.3 percent of men. The occupancy rate, which includes both formal jobs and income generating activities and employment in the informal economy, is estimated at 54 percent of the population aged fifteen and over, and is much higher among men (67.7 percent) than among women (40.8 percent).² Formal jobs, calculated on the basis of data supplied by private companies and public administration regarding entries in the social security system, in 2010 numbered of less than ten thousand (9,602).³

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Despite the importance of the informal economy, there are no studies or surveys which may serve as a source of the concrete number of workers belonging to the informal sector, both with respect to those living solely on income earned in the informal economy and those who complement and/or supplement their income through informal business and other activities. The common perception, namely obtained through qualitative field research, is that the chances of finding a job in the formal sector are very limited. On the other hand, those who have a (formal) job often receive such low wages that they need to supplement them with other (informal) income. One can therefore infer that the vast majority of the working population is dedicated to informal economic activities, creating their own forms of survival, their “employment posts,” through their own business or through entry into existing hiring businesses.

The size and scope of organization and representation in the informal economy, as well as the protection provided to workers outside the formal system, is correspondingly little known beyond the aforementioned social security figures. Beyond the almost always precarious and irregular incomes, a number of other problems have been associated with the informal economy, related mainly to the lack of rights, poor working conditions, and lack of inclusion in a social protection system. In São Tomé and Príncipe, as well as in similar contexts of developing countries, this lack of social protection and of income stability has led in some cases to initiatives aimed at changing the living conditions of workers in the informal sector through defense organizations. These materialized mainly in the form of informal workers’ organizations, both established by the initiative of the workers themselves or as a result of incentives on the part of other bodies such as trade unions (in turn, supported by the state), NGOs or even state institutions and/or partnerships with civil society. In São Tomé, both the bottom-up initiatives started by informal agents, or the top-down forms of organizing the workers, including most importantly the activities of the two central trade unions, resulted in the establishment of structured associations with the potential to support their respective members.

This article aims to analyze two types of processes dedicated to the organization and representation of the informal workers in São Tomé and Príncipe — trade unions and sectoral initiatives — and provide some concrete examples of associations of the informal workers. In this analysis, the motivations for the establishment of such organizations are articulated together with the description of the actions and activities carried out by them, in order to compare their respective support for workers. Aspects of the differences between these two main types of organizations are further explored through the identification, on one hand, of the main obstacles that undermine the effectiveness and efficiency of informal workers’ organizations and, on the other, of the capacities developed and support provided by these organizations that contribute to the improvement of the situation of the members and agents represented.

The results presented here are based on documental and empirical research conducted in 2013. Fieldwork in São Tomé included interviews with informal economy workers and relevant informants in the institutions related to this sector, for example, unions, non-governmental organizations, and government departments and services. The collection of information on the organizations of the informal economy focused on both the common workers and the presidents of associations of money exchangers, taxi drivers, and motorbike-taxi drivers. Over forty such interviews were conducted in the city of São Tomé, where the informal sector as well as the organizational initiatives and representatives are more vibrant. The informal workers were chosen randomly, resorting to a “snowball”

selection methodology, with the aim of collecting personal stories and experiences. The organizations identified and contacted provided broader points of view of the country and the informal economy sector and were therefore selected based on their relevance regarding workers' issues. Data collection was complemented by querying other data locally, especially in the National Institute of Statistics (INE) that congregates most of the official data about the national economy. Our conclusions aim to provide a meaningful panorama of organization and representation in the informal economy in the country, as well as of elements for comparison with other African contexts. Despite the reduced size of the country, its population, and the absolute size of the informal economy workforce, by highlighting the dynamics of sectoral associational constructions and their social relevance, the research highlights the importance of such mechanisms to help workers in Africa in the face of precarity and a lack of social security.

Organization in the Informal Economy in Africa: Mixed Dynamics and Drivers

The Disorganization of the Informal Economy in Africa

The processes of organization among informal workers in Africa, as well as in other geographical latitudes where the informal sector has significant weight, arise as a consequence of the evolution and growing complexity of the informal economy. Initially regarded as a transitory phenomenon in developing countries, a result of processes of economic liberalization and structural adjustment associated with rapid urbanization, the informal economy has become, however, a constant. Involving more and more social actors, providing livelihoods to a significant part of the population and constituting a very significant part of the GDP of developing countries, it began to be debated both among local policy stakeholders and globally among academics.⁴ While countries like São Tomé and Príncipe are not usually part of the informal economy debate due to the small size of its population and economy and the importance of the sector regionally, research has shown the recurrences within the context of the global south and how they produce locally adapted responses.

At the international level, the role of the International Labor Organization (ILO), concerned with the multiple implications of the informal economy in the area of labor and social protection needs to be noted, particularly in what regards research. Since the concept of the informal economy was articulated in the early 1970s, it has come to dominate discussions not only on the economy, but also those related to socio-economic development.⁵ Several studies, analysis, and monitoring began to be produced regularly, providing insight about the informal economy and of the many actors involved, from informal actors to governments.⁶

Frequently, the informal is associated with little order, lack of control, extreme poverty, and low education levels among workers. However, there were significant changes in recent decades in Africa, either due to the extent this sector acquired in the overall economy and by the growing complexity of the activities involved. Currently, the informal economy absorbs different types of workers and agents, ranging from the self-employed to wage workers, individually or integrated in collective enterprises. Despite its importance in terms of the growing number of people that it absorbs, and to whom it ensures livelihoods, there are many adverse aspects for workers involved in informal activities. The most important of these is the lack of protection and access to the kind of benefits that most of the workers in the formal economy have. Moreover, the higher exposure to irregular income makes this

sector more prone to instability, which in turn calls for collective organizational solutions, sought after in the informal sector itself or elsewhere.

Organizing Dynamics and Actors

In the face of the scenario of precariousness associated with informality, extended to a very large number of people, one of the actions the ILO has identified since the dawn of the century is a strong incentive for the creation of organizations of informal workers, both with the help of the unions in the formal sector as well as by representatives of various informal sector occupations.⁷ This has happened in different ways. The ILO International Symposium on Trade Unions and the Informal Sector, held in Geneva in 1999, noted the importance of the creation of associations of workers, according to the needs of people involved in working in the informal economy, and it made several recommendations both for governments and for international organizations.⁸ At the International Labor Conference in 2002, dedicated to decent work and the informal economy, the ILO defined the facilitation of the processes of representation as one of the tasks for government and emphasized that legislation is the most important factor for providing social protection to all workers.⁹

The need for organization and the creation of systems of representation was also felt, in some cases, by the workers themselves, especially in the areas where the confrontations with the local authorities are more frequent, for example in commerce, or in those where better organization allows for a better performance of the activities, as in the transportation sector. The actions developed collectively are perceived, in some cases, as having more probability of success, increasing not only the visibility and awareness of problems but also the power of persuasion of informal workers involved in them.

In general, two main types of organizational processes can be distinguished in the informal sector. On the one hand formal workers' associations or trade unions are developing actions aiming at broadening their reach to informal sector representatives.¹⁰ On the other hand processes of organization are emerging from within the informal sector, with organizations of informal workers created by the workers themselves in response to their needs.¹¹ A third type of organizational process, with tendencies to grow and which involve increasing numbers of social actors, is the development of international networks in the informal economy.¹² The latter will not be addressed here as it would require further investigation, but it is worth highlighting the potential relevance of these networks in the insular Gulf context. The increased traffic and flows of people foster the development of international movements and networks in which São Tomé participates, with a potential for expanded economic opportunities.

Resulting from local dynamics, individuals and groups join collective organizations, on the regional and even international level. As members of networks, not only can their operations be more effective, but also their visibility and solidarity increases. A better awareness on the part of informal workers that some order and structure could produce positive effects not only in terms of their own activities but also in relation to social protection has led to the initiation of processes of self-organization in different contexts and cases. The main objectives that underlie the formation of organizations in Africa therefore relate schematically to, first, the need to enhance the capacity of members to act against adverse situations at different levels and, secondly, the need to be able to claim improvements of their situation and conditions, whether related to specific activities they perform or regarding the informal economy in general.

The types of informal worker associations vary according to the different African contexts. There are small organizations operating in a single location or part of a city and organizations at the national, regional, or even across international level networks, such as in case of the cross-border trade. Normally, each association brings together people linked by the same profession. In addition to the workers themselves, these associations may, in some cases, be linked to other sectors of public life such as governmental and non-governmental institutions.

Studies about the Portuguese-speaking African countries (PALOP), which have included the Santomean informal economy, have shown that the process of organization and representation is relatively recent and is composed of two main types of actions: the expansion of formal labor unions to include informal workers and the formation of organizations of proprietors or self-organization of the workers involved in this sector.¹³ The steady increase in the number of informal workers' organizations, both those created by the workers themselves and those that are created as a result of encouragement from government institutions or unions, demonstrates their importance at various levels for agents, for governments, for the unions, and, in parallel, for the political parties, as informal workers constitute a significant political force.

Perceptions about the Benefits and Purpose of Organizing

From the point of view of the workers in the informal sector, there are several advantages associated with the creation of associations. Firstly, the "three Vs" (voice, visibility, and validity) articulated by WIEGO (Women in Informal Employment: Globalizing and Organizing), specifically directed to the necessity of organizing women in the informal economy but also valid for other groups.¹⁴ Informal workers, when organized, have more influence in the political, economic and social decisions made by national governments and even international organizations. In negotiations on issues such as increasing salaries, reduction of taxes and fees, access to finance and credit, and access to social protection among other concerns, organizations achieve better results than individual people. In the African context there are many examples of such negotiations, and there are several identified methods that generate benefits for workers. In the specific case of social protection, for example, there are examples of negotiations over the inclusion of informal workers in the national systems of social protection and also the cases of creation of specific internal systems, adequate to the needs of each group. Examples range from achievements in developing countries regarding the social protection schemes for specific groups, like home-based workers or street vendors, to national social protection strategies integrating the workers employed in the informal economy.¹⁵

From the point of view of governments, informal workers when organized are more easily controlled and some actions to gradually formalize the economy may even be imposed. Moreover, if there are representatives for the various negotiations between the state and the organizations and, at the same time, organized structures able to provide information for decision making, governments can better adjust their policies to the real situations. These advantages are more and more recognized in many cases, which favors the emergence and consolidation of this type of collective action. Finally, social structures such as workers' unions that in recent years experienced a strong tendency to lose members in most African countries – which is undoubtedly also linked to the lack of formal employment – consider informal workers as a possibility for maintaining a workforce

capable of negotiating with governments and, therefore, able to enhance the effectiveness of their actions and claims. Activities of trade unions with workers in the informal sector constitute a major phenomenon in recent decades in Africa.¹⁶

The perceptions related to organization in the São Tomé and Príncipe informal economy do not differ much from those described above. Despite its extension, organizations in this small insular state are seen as potential instruments for increased social and economic protection, while government normally prefers to negotiate with such organized structures. The processes of constitution and consolidation of these organizations are, however, dependent on a multiplicity of conditions.

São Tomé And Príncipe: Large Informal Economy and Limited Organization

Changing Economy and Increased Precariousness in the Transition from the Roças to a Market Economy

The Santomean plantation economy of sugar (from the late fifteenth century to the end of the next century) and then of cocoa and coffee (from the nineteenth century) was heavily based on the use of the islands as a hub for the Atlantic slave trade. Large-scale coffee and cocoa plantations, called *roças*, are closely linked to the formation of the country's economy and society.¹⁷ Slave labor—a afterwards “contract” work in the twentieth century, likewise limited in terms of individual freedoms—dominated the labor scene for several decades.¹⁸ Economic and social dependence within the colonial plantation system impeded the formation of social networks and solidarities.

In the periods of economic stagnation, related to the decline of the sugar industry from the first half of the seventeenth century, the importance of *forros*, the creole population that by that time constituted the majority of São Tomé's urban society, had increased and gained some economic autonomy. In periods of recovery of the importance of the *roças*, in the nineteenth century, the circumstances of the *forros* again began to be circumscribed as they had not accepted working in the fields, and, devoid of land, they had very limited options.¹⁹ Those who have not managed to work in the administration were restricted to searching for basic survival, often made difficult by the Portuguese colonists.²⁰ Although the *forros* were not able to generate significant economic alternatives to the colonial dominance of the *roças*, they can be considered to have originated alternative urban solutions to survival, mostly related to trade and services.

Independence, proclaimed on July 12, 1975, brought a politically recognized equality between different social groups whose social statuses were very dissimilar at that time. The cities, however, witnessed important growth due to rural exoduses of former contract workers, creating new urban social and economic configurations. The *roças* were nationalized, and their designation was changed to *empresas* (companies). They started to be run by directors appointed by the minister of agriculture, but these directors in most cases, did not have adequate preparation for performing managerial tasks, thus contributing to increased rural migration towards the cities.²¹ The precarious conditions in which the workers had to perform their duties led to a massive abandonment of the plantations and the beginning of the exodus to the capital city, with the hope of finding better opportunities. *Empresas/roças* became inoperative and de-capitalized and subsequent attempts to diversify the economy by creating several public companies did not succeed. The excessive ambition of the investment plans and the mismanagement of companies led to “considerable financial loses, further worsening public finances.”²² The situation worsened in the mid-eighties when

the government, responding to the economic downturn, launched the Structural Adjustment Programs (SAP). The results did not respond to the expectations and the majority of both agricultural and non-agricultural state enterprises were liquidated or privatized.²³ As an advisor to the president noted, “these farms, since the last colonial years, had gone bankrupt.”²⁴

In recent decades, the country started relying heavily on international aid while at the same time an “alternative” to agriculture, the tourism sector, slowly started to develop.²⁵ Expectations related to oil exploration since the 2000s have fueled hopes for increased autonomy from international financial aid. However, as with the emerging tourism sector, the oil related activities have not absorbed a significant portion of the working population.²⁶ The country’s extreme external dependence, both in terms of imported products and financial aid that allows its operation, does not seem to be decreasing. This fact is regarded as one of the causes of political instability as political parties systematically voice mutual accusations regarding the state of the country and the economy.²⁷

The gradual reduction of State employment as a consequence of privatization or closing down of state enterprises from the 1980s has not been accompanied by sufficient development of the private sector that could absorb the available labor force. The Reform of State Enterprises in the 1990s (Law/14/92), economic liberalization, international crises, and political democratization of the country were some of the conditions that led to the emergence and gradual expansion of small-scale economic activities in various sectors.²⁸ Created by the people involved without support from the state or the formal private sector, such activities, usually unregistered, are primarily intended to ensure the livelihoods of the families of the agents. Its main features are its small scale, the lack of organization, and the lack of legalization.

The “more dynamic” informal economy is, as expected, concentrated in towns and cities. The urban population of the country grew by more than 10 percent over the last ten years and is currently estimated at 67 percent of the total of population.²⁹ Consequently, many jobs, especially in the private sector, are not formal, meaning that the employees work without a contract, do not pay social security contributions, do not have access to social protection or the right to paid holidays, among other working conditions. The report *Household Budget Survey* of the National Institute of Statistics indicates that the tax on corporate income affects only twenty companies including commercial banks, the main provider of telecommunications, hotels and import/export firms. The other agents (small retail business and activities related to transportation and financial services), representing almost 65 percent of GDP, come from the informal sector or benefit from tax exemptions.³⁰

Given this scenario, post-independence economic transformations constituted the main cause for the increased number of people who began to look for ways to survive via informal activities, leading to the gradual and steady growth of this sector. The *leve-leve* pace (the local notion of tranquility related to the natural abundance of the island and its quietness) and the lack of economic opportunities cause much of the working population, especially the youth, to remain in a situation of basic subsistence, limited to ensuring daily meals, without any prospects or plans for the future, as our interviewees often stated.

The poverty of the islands is also one of the causes usually pointed to as a factor behind the growth of the informal economy as a response to precariousness. More than 66 percent of the population is considered poor by international development standards and live on less than \$1.70 per day.³¹ The poverty rate is higher among women, 41 percent of whom are heads of households. In the District of Caué, the poorest of the country, the poverty rate

exceed 84 percent. According to the Institute of National Statistics, also living conditions—access to water, electricity, etc.—are generally poor.

Because of the frequent combination between formal and informal activities, and the essence of the informal economy that is the fact of not being registered, it is not possible to provide definite estimates for the population engaged in informal activities, as mentioned earlier. However, given the extension of the informal economy and the discouraging social and economic indicators, the precariousness of this sector is easily inferred.

Informal Networks, Social and Economic Solidarity and Protection

Broadly and over several years and different historical periods, protection of workers has been precarious in the islands. Over a prolonged period, when colonial domination over the local manual labor was the basis of social relations, the proto-class of Creoles (*forros*) started to progressively engage in activities related to administration. During the period of economic stagnation in the 18th century caused by the decline of international competitiveness of sugar, they increased their social and economic importance. In the so-called “second colonization” of the 19th century the Portuguese returned to the island to start the coffee and cocoa plantations.³² The position of the Creoles again deteriorated as they largely lost position and status, and in many cases their land was expropriated in an attempt to force them to work in the fields.³³ However, these families have not lost all their prestige over the years. They created a solidarity network where a limited number of families participate and despite the historical transformations have maintained some social ties that favor its members politically and economically.³⁴

With independence, social and economic equality came to be the proclaimed basis of the new society under construction.³⁵ The pre-existing social differences and new differentiations that have been molded, however, created new social settings and new networks and solidarities, especially at the political level.³⁶ The transition to democracy that began in 1989 brought no improvement to the country’s economic situation and political instability; clientelism and the related importance of family connections did not contribute to the realization of development plans that could provide long-term improvement for the inhabitants of the islands. The explanation, often given to the acronym STP (of São Tomé and Príncipe), as stating *Somos Todos Primos* (We Are All Cousins), and the title of Gerhard Seibert’s 2002 book *Comrades, Clients and Cousins* provide some clues for better understanding the nature of social relations in the present situation, both at the general as well as at the highest political levels, the latter usually considered formal.

Notably, family relations in the country, as a result of the historical processes that the displaced *roça* workers underwent, have acquired a very specific form within the African context. In general, family networks are considerably “recent,”—including the mentioned Creole base—built since the arrival of the first members to the islands, who would normally have come alone as workers, over the period since the 17th century. Concomitantly, as referred to on several occasions in conversations and interviews, not all families can count on an extended family network ready to provide support to the members.³⁷ In some social spheres, family connections may provide for easy entrance into various institutions, involving both access to jobs or political positions, and help in resolving a range of issues.³⁸ But, such connections do not always function as a web of familiar solidarity in daily life, as found in other African contexts. This kind of regular everyday solidarity is often viewed as a crucial feature of African society, particularly in cases where people are not covered by national systems of social protection, which is the common situation in Africa.³⁹ In São Tomé,

the historic process of the construction of the society was based much more on systems that were geared towards a nuclear family organization within the framework of systems of work and residence on *roças*, than in the typically African model of an extended family. Already a decade ago, “the idea that there is a degradation of values in general and particularly in relation to broader family networks” was frequently articulated in São Tomé.⁴⁰

While family networks are generally weak, social protection (Law 1/90 of 8 May), which covers formal economy workers in situations that inhibit the generation of income through their work (e.g., illness, disability, unemployment, child birth, etc.) was estimated to cover only about eleven thousand beneficiaries in 2004.⁴¹ In 2010, however, it was found that it only reaches 9,602 workers, 19 percent of the active population.⁴² Additionally, although legislation has been developed extending the scope of protection to the self-employed and those not covered by other schemes of compulsory social protection (Law 7/ 2004), the so-called Social Protection of Citizenship, provided by the state to the more vulnerable covered only 4,479 people in 2010.⁴³

Therefore, if we take into account these figures, the social protection neither comes through the state to a significant proportion of the population nor is it anchored, alternatively, in informal family networks. These numbers are apparently the fundamental reasons that led to the creation of organizations among the members of certain professional groups. Through mutual aid systems, they aim at improving the situation of those who are in real need and/or who are in vulnerable situations. The results of a comparative study on social protection, informal economy, and exclusion in Portuguese speaking African countries, conducted between 2005 and 2006, mentions some processes, advanced or in the early stages, of organization in the São Tomé informal economy. In the area of trade, there was the intervention of various “associations and organizations representing the sellers, which can be an important tool for mediation and facilitation of a progressive institutionalization of norms, codes of conduct and labour procedures to alleviate the negative effects associated with the practice of commercial activities in informal circumstances and provide the basis for the extension of social protection schemes.”⁴⁴ The existence of organizations, including the Union of Taxi Drivers, was also noted.⁴⁵ This organization represented the majority of passenger transporters in São Tomé at that time. And the first steps towards organizing the agents of the foreign exchange parallel market were also being taken at that time, although apparently, these had not yet achieved positive results.⁴⁶

Taking into account these evolutions and the results of the research and of fieldwork, it can be concluded that both the family and the state networks, and even the networks of support and solidarity associated with the informal economy themselves, failed to cover the spectrum of protection required in such contexts of vulnerability. The developments registered in terms of collective organization in the informal economy, already showing some positive results, need, however, to be mentioned.

Organizations of the Informal Economy São Tomé

Collective Organization in São Tomé City

Trade comes first among the São Tomé informal economy occupations in terms of involving the most people. With a short walk through the central area of the capital or other district centers, it is possible to estimate the extent of this activity. Vendors of all types of articles occupy the various markets, squares, and stalls on the edge of the streets. Besides all kinds of food or processed products, there are clothes, shoes, housewares, cosmetics, and

cigarettes. Next to the vendors that have a permanent spot, there are street vendors, and what also draws attention is the number of people selling food and drinks to the sellers and buyers themselves, circling with huge thermo-bottles or plastic boxes on top of their heads, bringing these products to the market points. Furthermore, in the city center, it is possible to see the many informal alternatives to transportation, mainly concentrating around the *Mercado Velho* (Old Market). The transportation sector also involves a substantial number of agents, some partially formalized, using nine seat *Hiaces* or motorbike-taxis, supplementing the lack of public transportation companies, both state and private. This “alternative” system serves the capital but also connects the capital with the larger villages throughout the island.

While these can be considered the most active sectors of the Santomean informal urban economy, they are also sectors where collective organization, both led by the state and by the joint action of the agents, is more active, regardless of the reduced number of people this involves or the apparent fragile sustainability of the activities developed. The feeble dynamism of civil society in São Tomé is, in fact, the result of the historical specificities of the archipelago, mainly of the strong dependence of *roça* workers on their bosses and also of the restrictions imposed on the creation of associations after independence and within a proto-socialist regime. After independence and the nationalization of the plantations, the society had created the expectation that the state should solve all problems and guarantee better living conditions for all inhabitants.⁴⁷

The first informal associations, initially created by farmers, began to emerge in the late 1980s with the goal of transforming the precarious situation they faced as a result of inappropriate policies adopted by the state. These associations, however, had a very limited life span as the plantation economy did not advance.⁴⁸ Afterwards, the political opening in the early 1990s generated more opportunities for the creation of new political parties rather than associations. Simultaneously, non-governmental organizations began to appear, particularly through the external support of foreign NGOs. The first umbrella platform of national and international NGOs, the Federation of Non-Governmental Organizations in São Tomé and Príncipe (FONG-STP), was created in 2001.⁴⁹ Its aim was to represent various such organizations and promote greater cooperation and coordination among them.⁵⁰ The progressive orientation of the activities of local organizations to the programs of donor funding, which did not always correspond to associative objectives, was one of the most notable results over the years of experience with the projects and support programs in São Tomé, as indeed is the case in many other developing countries.⁵¹ “The dynamics of NGOs here are very debatable. They act more in terms of financial resources, while there is funding, but when there is not, they feel retracted.”⁵² The results, in general, are therefore considered weak and limited, without sustainability.

Labor Unions: Top-Down Establishment Promoted by the State

The initial stages of the formation of labor unions was in the late 1970s when under the aegis of a single party regime the first workers’ organizations, inspired on a socialist model, were created and have since then continuously been funded by the state. The first federation of unions, the *Organização Nacional dos Trabalhadores de São Tomé e Príncipe – Central Sindical* (National Union Organization of Workers of São Tomé and Príncipe, ONTSTP-CS) was created in the late 1980s. With the democratic and economic liberalization of the next decade, the labor movement gained another dimension with the establishment in 1993 the second federation of unions, the *União Geral dos Trabalhadores de São Tomé e Príncipe* (General Union of Workers of São Tomé and Príncipe, UGT-STP). “These unions have given the first steps in

this whole democracy of legalization . . . until the first days of 2000. Afterwards there was a kind of boom and today we are no longer represented by this type of organizations."⁵³ Regardless of the political and economic transformations, state support of the Santomean unions and federations has not ceased regardless of the sectoral claims for better conditions of work or salaries that regularly mobilize workers and their organizations. They have not, however, been able to provide the support workers expect and need.

The processes of organization of informal workers in São Tomé and Príncipe started in the late 1990s, mostly steered by the already existing post-independence unions that, following directives received from the World Confederation of Labor (WCL), began to "help workers who were losing their jobs" as a result of privatization and liquidation of state enterprises.⁵⁴ In 1998, the UGT-STP federation created the first organization in the informal sector, the association of *paláites* (fish-sellers), predominantly consisting of women. Other efforts to organize informal workers occurred in the first decade of this century. Currently, and since the late 1990s, UGT-STP also includes workers of the informal sector, and it has on its list the Informal Traders Union, the Motorbike-Taxi Drivers Union, and the Union of Taxi Drivers. These extensions were largely fomented by the state and by renewed government policies, some of them through international funding. "We included informal workers in the late 1990s. In 1997-1998, we started with *paláites* and then, a little later, came the taxi-drivers. And we have with us the motorbike-taxi drivers for five-six years."⁵⁵

The older trade union federation, the ONTSTP-CS, brings together about ten unions. "On the level of health care system, public companies, the port, the airport; it seems that by the end of the year, the public workers will join our union."⁵⁶ Regarding the informal sector, ONTSTP-CS integrates the union of self-employed workers of the port and the dockworkers' union (*União dos Estivadores*), an organization that despite the name is still based within the informal economy. The inclusion of informal worker associations in this federation is newer than in the case of UGT-STP and was initiated at the request of informal sector representatives in the late 1990s. "In the case of our central, they were the ones that asked us. The associations of informal workers can be a part of our central," noted the ONTSTP-CS General Secretary. "We made this decision because we found that the informal sector is in a growing period and there is no alternative for these professionals."⁵⁷

To increase the number of unionized workers, the unions prepare various studies and analyses, followed by proposals. In 2002/2003, UGT-STP conducted a survey on the main problems facing unions and their members, both globally and at the level of local unions. Based on this information, it established principal objectives to be achieved and actions to be taken. Among the fourteen goals defined as priorities, the organization of the informal sector and the promotion of social coverage are considered central.⁵⁸ The federations pay special attention to raising the awareness about the benefits provided by the organization of informal workers, to training, to the dissemination of information regarding workers' rights, and to the possibilities for inclusion in the national system of social protection.⁵⁹ Both organizations are aware of the size of the informal sector and the amount of people it involves, as well as of the fact that in general the workers are in precarious employment situations. The top-down orientation is therefore towards the gradual formalization of workers to increasingly achieve better working and living conditions.

One of the most relevant examples of concrete action by unions in organizing informal activities is that of the clothing market sellers. The UGT-STP has an unquestionable part in the formation of this association, being conscious of the expected growth. The process is in its early phase but some of the objectives have already been established. The main problem

of vendors is the growing competition from the *fardos* (“bales”) sellers who import bales of used clothing, usually from coastal West African countries; the decrease of demand in a context of the worsening economic situation of families; and the constant increase, both quantitatively and, in terms of quality, of used clothing available in the city. In addition to the merchants selling *fardos* in the vicinity of the market, there are many in other places in the islands who sell new and used clothes they bring from abroad or that are sent to them by relatives or friends. The decrease in the volume of business results in difficulty or even the impossibility of paying the fee that the city council requires monthly from all sellers of the market, which exceeds 200,000 Dobras (USD 12). The future association will be supported by the union and aims to face these problems with initial activities that include meetings and discussions to “verify the difficulties of each one and check how things are.”⁶⁰

Despite the slow pace of both the achievement by trade unions in establishing bridges between informal sector workers and the government and the actual provision of the means for increased protection, the preference of the government is still centered on these organizations. This is in great part due to the equal or worse capacity of sector-based associations and organizations to assure protection and representation as well.

Bottom-Up Organizations of the Informal Economy: Money Exchangers, Taxi Drivers, and Motorbike-Taxi Drivers

Following the creation of unions and the top-down inception of initiatives aimed at the informal economy, some processes in the “upward” direction have been developed, arising among the informal workers themselves, the majority of which are not supported by national or international funding. Overall, both the bottom-up and top-down initiatives have the same general objective of improving social protection of workers and representation. Specifically, sectoral initiatives supported by the workers and developed by them aim at amplifying the voices of a particular group engaged in a particular activity; solve specific problems of each professional group; create mutual aid systems of social protection; and provide access to credit to improve the activities in each sector. The results achieved are, however, different, underlining again the problems of organization and representation in the informal economy despite the various incentives and inspiration.

The resolution of various issues with the state institutions were facilitated when these types of groups began to form, as stated by both the informal workers interviewed and the government key-informants. Nevertheless, the role of trade unions and federations in these apparently more “autonomous” processes should be highlighted, as many of the associations created by the informal workers were influenced by the initial activities of trade unions and/or, at a certain stage, joined one of the federations or asked for their support. Among the associations analyzed here, only the money exchangers do not have and never have had any link with the unions. The others maintain direct relations but the influence of unions is relative, given the bottom-up genesis of informal associations and the limited capacity of unions to support the associations in their activities.

Money Exchangers

The association of money exchangers was established in 2008 in the capital with the main objective of organizing all those who work in this area, both small and large-scale agents. The adherence was almost complete, estimated at 120 registrations, and today the organization has more members than the existing moneychangers working in the city of São Tomé.⁶¹ As underlined by its president, “those who are not registered are not allowed to

exchange money."⁶² This then almost forces everyone employed in the foreign exchange market to join the organization. This control, relatively easy to achieve, was not well accepted among the moneychangers from other nationalities who began to appear in São Tomé's exchange market about two years ago. From that time, and also because of the worsening international economic situation, local moneychangers witnessed a significant decrease in the volume of their business. The introduction of a fixed exchange rate against the Euro in January 2010 was another cause of the limitation of moneychangers' activity. They have tried many new ways to earn money, especially those related to making loans, but this requires greater trust of their customers. "These days, we are tightened by other groups of Lebanese and Nigerians, we hardly earn any money," noted the president of the Association of Money Exchangers. "We have to invest in another activity, which is the case of mortgages. We receive post-dated checks, give the money to the person in advance and charge some percentage."⁶³ This competition, which the moneychangers consider unfair, is indicated as the biggest problem nowadays.

Currently, moneychangers have no support from the state or non-governmental organizations. Members pay, though irregularly, monthly fees to the association. Several attempts to gain such support have been unsuccessful: "We had a meeting with the government, with the Governor of the Central Bank; we have already managed a deal to get some space for our organization, to be able to have our headquarters, but so far nothing has been completed, we are waiting."⁶⁴

Given scarce resources, the activities of the association are limited. The aim of the majority of actions is to increase the association's visibility through the organization of various activities such as cleaning the streets or the beaches, and also by providing aid to disaster victims.⁶⁵ Support to the members in terms of social protection, solving specific problems of the group, or providing access to credit is not undertaken by the association as a whole but by smaller groups within it. Minor actions related to mutual aid are organized by these smaller groups that operate in specific informally pre-determined spots and have their own representative, who is in direct contact with the association and takes only the more serious concerns to the association whenever necessary. Such groups also provide mutual aid to members and within this limited circle, especially in cases of illness, death, accidents, or other situations where someone needs financial support and cannot get otherwise. In practice, the role of the smaller, informal groups is more important than the role of the association because the actions taken have real and regular impact on the functioning of the representatives of this profession. The recognized greater effectiveness of these arrangements allows keeping order and regulating operations, still within an informal articulated system.

Taxi Drivers

Generally there has been increasing informality in this sector since independence and informal transportation of this type is probably one of the most visible informal activities in São Tomé. On the one hand, there are an increasing number of taxi drivers and, on the other, a gradual increase in the number of motorbike taxis that began about six to seven years ago. Both types operate mostly within the informal economy, as they do not pay any type of taxes.⁶⁶

The association of taxi-drivers, registered as *Sindicato dos Taxistas e Proprietários de Viaturas Ligeiras e Pesados de Aluguer* (SINTAPROVA, Union of Taxi Drivers, Rental Cars and Light Trucks Owners), was established in 2004 with the support of the federation UGT-STP. It is currently the institution "accountable to the government for taxi drivers."⁶⁷ Two types

of associates are registered in this association—those who pursue their activities in legalized form, i.e. paying taxes, and those who work informally, not fulfilling their tax obligations. Despite both types paying a tax for using their vehicles, the majority of them do not pay any contribution to social welfare or activity taxes. The second interesting feature of this association is that both the drivers and the owners of taxis are grouped together. The latter, in most cases, also work as drivers. Drivers working for the owners usually do not have a written contract and the relation is based on an oral commitment that often does not benefit the worker. Typically, drivers receive a monthly salary ranging between 800,000 and one million dobras (a little less than 50 dollars), not having the right to holidays or paid social security contributions. Likewise, the employer is not responsible for support in case of illness or accidents.

The association was created to represent the transportation sector, to solve the common problems of workers in the sector, and to organize the areas where the taxis are concentrated. “A thousand or more taxi drivers [in the country] is a [big] class and we have these continued difficulties; so we wanted to have a representative who can respond for the group.”⁶⁸ Initially the association had 150 members and this number has grown successively over the years as taxis increasingly provide the main form of transportation in the country.

Most of the organization’s objectives, as stated in its statutes, were not yet achieved. These included support of and intervening in defense of its members; organizing the technical, financial, and human resources to support the associated taxi drivers; promoting political, cultural, political, and unionist training of the members. The activities of the association are confined practically to the maintenance of order at taxi ranks. According to the president of the association, the support of the federation barely exists and they are still not able to collaborate with other institutions: “It is a struggle that we have constantly.”⁶⁹ Members do not pay the established quotas regularly (or never) and so lack of financial resources is the main obstacle that hinders the performance of other activities, more related to communication, social protection or access to credits in order to improve the working and living conditions of the associates.

Motoqueiros (Motorbike-Taxi Drivers)

As already mentioned, motorbike-taxi drivers usually do not pay taxes as well. Similar to SINTAPROVA, the union of motorbike-taxi drivers is undergoing a relatively passive period of its existence due to the difficulty of collecting contributions from its members. It is the most recent union in the informal economy, which is related to the fact that this activity started only a few years ago. The first motorbike-taxi drivers, called *motoqueiros*, began to circulate in the city in 2006-2007, “spontaneously, especially because of the lack of employment.”⁷⁰ The trend toward using motorbike taxis came from the West African countries such as Nigeria, Togo, Gabon, and Angola, where this practice already existed.⁷¹ Very quickly, this new form of transportation gained popularity, causing a rapid increase in the number of motor-bikers, as passengers recognized several advantages: the lowest fare, the speed and convenience of door-to-door service unlike the fixed routes of collective taxis, and the possibility and ease of finding a motorcyclist almost anywhere in town and surroundings.

Motorbike transport, initially restricted to the capital city, quickly spread to other locations, especially larger ones, and there are currently several stands of motorbike-taxis elsewhere in the island. The increased availability of these services evolved proportionally to the interest of young people for this new profession. Although there are no exact figures

because these professionals are not all registered, over the last six years the group that originally did not reach a dozen taxi drivers has now near estimated eight hundred agents on São Tomé alone, which is proportionally a significant part of the urban working population. There are a reported significant number of cases of workers who frequently use this occupation as an extra means for augmenting their official earnings, which makes it even more difficult to assess the actual figures.

The difficulties that representatives of this class felt from the beginning, particularly the animosity from the authorities and other taxi drivers, increased as the number of motor bikers began exceeding customer demand. The association of motorbike-taxi drivers, created in November 2009, was registered with the Department of Labor, Employment and Professional Training of the Ministry of Health and Social Affairs in September 2011 as the Union of Motorbike-Taxi Drivers (SINMOTOSTP). It was created as a result of the acknowledgment of various problems between the bikers and the police, the state, and even with some citizens. The motorbike-taxi drivers felt marginalized, devalued, and disrespected. In order not to embark on further confrontations with the authorities and other discontented groups, which were already latent, they began to organize themselves, while also striving to improve their working conditions.⁷² They contacted one of the federations, UGT-STP, and also asked some political parties for financial support.⁷³ Currently, the association includes approximately 140 members in São Tomé only, which represents about 18 percent of the total of professionals.

Various actions have been developed over the years, such as the distribution of reflective vests (that most of drivers never use), attempts to raise awareness about the importance of having a driving license, and advocacy for negotiating a reduction of the price of licenses, but the results have not been as hoped for. Not all associates are covered by the activities and the capacity to influence national policy is limited. There has also been an attempt to incorporate the bikers in the national social security system, which, however, was never implemented.⁷⁴ Here too in this sector, the objectives of raising the voices of informal economy workers and strengthening representation have been tenuous and irregular. The organization of collective mutual aid systems of social protection has also fallen short regarding the existing number of agents and other anticipated advantages of the associative efforts, like facilitating access to credit, have not been consistently developed.

Conclusion

The insufficiency of employment, which is main cause for the constant growth of the informal sector in São Tomé and Príncipe, is accompanied by other factors that stimulate and perpetuate informal economic activities and their precarity. One of these is the difficulty workers face in legalizing their activities and creating opportunities that allow them to access the benefits that most of the formal workers have, e.g., inclusion in the national system of social protection or access to credit. In the context of significant socioeconomic changes and particularly the context of weak family networks and support, certain functions covered by associations, such as representation and capacity for negotiation, are considered increasingly important, both by the state and non-state counterparts and by the agents themselves.

In general, it can be said that the associations of informal workers in São Tomé and Príncipe, both those supported by the state (i.e., national trade unions) and those arising from sectoral initiatives, are insufficiently dynamic to attain the objectives they have in common and the objectives particular to their individual associations. In specific areas, such

as major concerns like facing and regulating sectoral competition, problems are apparently resolved with the creation and consolidation of such associations, which are based on existing social networks. For instance, the association of clothing vendors has been partially able to regulate the somewhat competitive and continuously growing market. Money exchangers through their association found ways of minimizing the effects of foreign competition. Among the taxi drivers, it was possible to organize internal competition by regulating the functioning of taxi stands and at the same time exerting pressure for the regulation of the main competitors who started appear, the motorcycle taxis. The latter in turn, have been able to create an association to regulate their participation and representation in the transportation sector.

In general, however, there is a gradual decrease in the activities of associations over the years, including the state-supported unions. The weak results of the actions often slow down the initial enthusiasm that accompanied the establishment of such organizations. The constant problems with the lack of funds to implement programs and the weak capacity to influence policy at a higher level are also hampering factors that require a degree of persistence hardly found among the informal agents. Despite the positive signs of change in the area of self-organization, with the growing tendency of sectoral bottom-up created organizations replacing the top-down traditional mechanisms, the crucial areas that such organizations propose to address are not yet effectively covered. Representation and amplification of the voices of informal workers, the creation of social protection mechanisms or the support of activities through facilitating access to credit are not yet established and will apparently require further efforts on the part of relevant stakeholders, which include the informal economy agents themselves.

Notes

1 According to the last Census (INE 2013), the country has a total population of 179,200 living in a total surface area that slightly exceeds one thousand square kilometers. The majority of population, nearly 96 percent, lives on the bigger island, São Tomé. The urban population is much larger than the rural, an estimated 119,781 persons. The urban district where the capital city called São Tomé is located has nearly 70,000 inhabitants.

2 INE, 2013.

3 Valverde 2011, p. 13.

4 Hart 1973; Bryceson 1996; Meagher 2007.

5 Hart 1970, 1973; ILO 1972.

6 ILO 2012.

7 ILO 1999a, 1999b, 2002, 2007, 2009.

8 ILO 1999a.

9 ILO 2005.

10 Gallin 2001; Rogel 2006; Lopes 2007; Horn, Bonner & Jones 2008; Lindell 2008, 2010.

11 Gallin 2001; Macharia 2007; Meagher 2007; Lindell 2008; Horn et al. 2008; Lopes 2008.

12 Lourenço-Lindell 2007.

13 Feliciano et.al. 2008; Lopes 2011.

14 See the organization's website: <http://wiego.org/>.

15 See ILO at <http://www.social-protection.org/> or the above mentioned WIEGO website for examples worldwide.

- 16 Gallin 2001; Rogel 2006; Horn et al. 2008; Lindell 2008, 2010.
- 17 See Nascimento, 2002; Seibert, 2002; or Hodges and Newitt, 1988.
- 18 Nascimento 2002.
- 19 Seibert 2002, p. 39.
- 20 Ibid., pp. 76-77.
- 21 Ibid., p. 168.
- 22 Ibid., pp. 173-74.
- 23 Ibid.
- 24 Interview, Advisor to the President for Economic Development and Financial Affairs, São Tomé, 14 August 2013.
- 25 Brito 2010.
- 26 Nascimento 2009, p. 241.
- 27 Abreu 2013.
- 28 Udelsmann Rodrigues 2006, p.14.
- 29 INE 2013.
- 30 INE 2010b, p.2.
- 31 INE 2010b.
- 32 Seibert 2002, p. 47.
- 33 Ibid., pp. 76-77.
- 34 Ibid., pp. 63, 75.
- 35 Ibid., p. 140.
- 36 Ibid., pp. 139-40.
- 37 Udelsmann Rodrigues, 2004.
- 38 Seibert 2009, pp. 439-40.
- 39 Feliciano et. al. 2008.
- 40 Udelsmann Rodrigues 2004, p. 1.
- 41 INSS 2004, <http://seg-social-stp.net>.
- 42 Valverde 2010, p.34.
- 43 Valverde 2010, p.11.
- 44 Feliciano et al. 2008, pp. 107-08.
- 45 Ibid., p. 113.
- 46 Ibid., pp. 120-21.
- 47 Nascimento 2008, p.4.
- 48 Ibid., p.12.
- 49 Federação de Organizações Não Governamentais em São Tomé e Príncipe.
- 50 Check <http://fong-stp.net/>.
- 51 Hearn 2007; Brass 2012.
- 52 Interview, Executive Secretary of the FONG-STP, São Tomé, 9 August 2013.
- 53 Interview, General Secretary of the UGT- STP, São Tomé, 28 August 2013.
- 54 Ibid.
- 55 Ibid.
- 56 Interview, General Secretary of ONTSTP-CS, São Tomé, 28 August 2013.
- 57 Ibid.
- 58 UGT-STP 2003.
- 59 Interview, General Secretary ONTSTP-CS, São Tomé, 28 August 2013.

- 60 Interview, clothing market trader responsible for the process of organization of the vendors, São Tomé, 29 August 2013.
- 61 Some have temporarily left the country or for an undetermined period and others engaged in other forms of subsistence, without however leaving the association.
- 62 Interview, President of the Association of Money Changers, São Tomé, 27 August 2013.
- 63 Ibid.
- 64 Ibid.
- 65 Ibid.
- 66 Interview, President of the Union of Motorbike-Taxi Drivers of São Tomé and Príncipe, São Tomé, 15 August 2013.
- 67 Interview, President of SINTAPROVA, São Tomé, 22 August 2013.
- 68 Ibid.
- 69 Ibid.
- 70 Interview, President, Sindicato de Motoqueiros de São Tomé e Príncipe (SIMOTOSTP, Union of Motorbike-taxi Drivers in São Tomé and Príncipe), São Tomé, 15 August 2013.
- 71 Ibid. See also Oteng-Ababio and Agyemang 2015.
- 72 Interview, President of SINMOTOSTP, São Tomé, 15 August 2013.
- 73 Ibid.
- 74 Ibid.

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