

The strike as a challenge to the North and to the South¹

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ABSTRACT

The authors take up the theme of the “general strike”, which is discussed in several of the other articles, and do so by engaging in a comparison across the North/South divide that focuses on Portugal and India. In their view, the general strike is a defensive form of struggle in the neoliberal age chosen because other means of influencing political decision-making are absent. In the Portuguese case, the strikes took place against the backdrop of the imposition of austerity through governments and the troika; in the Indian case, the background was the liberalisation of the economy and the insensitivity of governments to union demands in a situation of general economic insecurity. All in all, Costa and Dias say that unions in the north have much to learn from unions in the south in the sense that they have to reach out to marginalised and precarious sectors of the population.

KEYWORDS

General strike, North/South divide, Portugal and India, Austerity, Liberalisation of the economy, Unions

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Introduction

Historically, the strike represented a sign of resistance to the mechanisms of oppression generated by capitalism, becoming common in Europe and in the United States in the late nineteenth century and the first decades of the twentieth century.² Its general features involve “forms of struggle, coercion and power in which a group of workers collectively stops working to enforce economic, social and/or political demands that matter to those directly concerned and/or others”.³ Thus, as a way of struggling for change in the unbalanced power relation between capital and labor, the strike consolidates itself as a mechanism for labour democracy. Today, however, it is called into question in different geographical, social and political contexts, as well as in the context of adverse economic scenarios. This seems to happen not only in countries associated with the “Global North”, labelled as developed or part of hegemonic regional blocs (such as the European Union), but also in countries associated with the “Global South”, which includes both the least developed countries and emerging economies.⁴

Considering that the important missions of regulating labor activity and boosting strike activity were attributed to trade unions, some starting questions guide our reflection in this text: considering the origins of trade unionism are found in the “Global North” – that is, in the context of the Industrial Revolution and the “national-industrial-colonial” era⁵ –, is Northern trade unionism prepared to embrace “Global South visions” more prone to a postcolonial perspective? To what extent can the literature on “epistemologies of the South” – which maximizes the adoption of anti-capitalist, anti-colonial and anti-patriarchal attitudes⁶ – be considered a reference guide to trade unionism in the “Global North”? What can the *old*

² SANTOS, Boaventura de Sousa. “A greve geral”. *Visão*, 17 de novembro 2011.

³ VAN DER LINDEN, Marcel. *Workers of the world - Essays toward a Global Labor History*. Leiden: Brill, 2008, pp. 182-183.

⁴ COSTA, Hermes Augusto; DIAS, Hugo. “A Greve e a democracia: desafios para o Norte e o Sul”, *paper* presented at the International Colloquium “Epistemologies of the South: South-South, South-North and North-South global learnings”. Coimbra, Faculdade de Economia, 11 July 2014.

⁵ WATERMAN, Peter. *Recovering internationalism. Creating the new global solidarity: labour, social movements and emancipation in the 21st century* (E-Book). Helsinki: Into Publishing Books, 2012.

⁶ SANTOS, Boaventura de Sousa; MENESES, Maria Paula (eds.). *Epistemologias do Sul*. Coimbra: Almedina, 2009.

trade unionism, accustomed to struggle (through strikes) to protect jobs and stabilize job sectors, learn from a *new* trade unionism that sees the strike as a way to incorporate precarious and unstable sectors of society? And to what extent, in the twenty-first century, can Southern trade unionism replicate the “good practices” that trade unionism in the North established during the “golden age” of the twentieth century?

We have no answer to these questions, nor do we have space in this article to debate each one in detail. However, our concern here is to try to understand to what extent the strike – as one of the instruments of trade union direct action – raises challenges to countries with different contexts, especially with regard to countries of the “South of the North” (such as Portugal) and countries of the “North of the South” (like India). Through this article, we intend to confront two realities concerning the phenomenon of the strike. However, we do not intend to present a comparative analysis, as we understand that Portugal and India are two countries with very different historical, geographical, socio-political and cultural dimensions. Similarly, the characteristics of the labour market, the role of trade union actors and labour law, among other factors, probably have more features that separate than unite the two. In any case, we are interested in seeking a rapprochement that can function as a mutual learning process between the two countries, as this can also demonstrate the challenges facing labour market actors (trade unions, workers, society movements) both in the North and in the South.

It is therefore useful to provide an abbreviated set of elements to contextualize the two countries, which is what we do in the first part of the article. We propose using four framework elements of comparison: the system of industrial relations; the post-democracy processes of strike activity; the context of austerity/liberalization; and changes in labour law.

In the second part of the article, we dedicate special attention to general strikes that took place in both countries. In the Portuguese case, five general strikes that occurred during the austerity period are examined. In the Indian case, the emphasis is on the general strikes of 28 February 2012, 20/21 February 2013, 5 December 2014 and 2 September 2015. The comparison between the strikes in the two countries will consider four topics for scrutiny, in line with the proposal of Costa, Dias and Soeiro.⁷ First, the *strike as a regulating mechanism* – of “conflict institutionalization”⁸ or a “safety valve”⁹

⁷ COSTA, Hermes Augusto; DIAS, Hugo; SOEIRO, José. “As greves e a austeridade em Portugal: olhares, expressões e recomposições”. *Revista Crítica de Ciências Sociais*. n.103, 2014, pp. 173-202.

⁸ DAHRENDORF, Ralf. “Elementos para uma teoria do conflito social”. In: *Sociedade e Liberdade*. Brasília: Universidade de Brasília, 1981 [1961], pp. 133-155.

⁹ COSER, Lewis. *The Functions of Social Conflict*. New York: The Free Press, 1956.

– which seeks to anticipate the occurrence of a conflict in order to produce an adjustment between different parts of the system. Accordingly, in democratic societies, the publication of a strike notice (in order to legally anticipate the occurrence of a strike and publicly express the critical feeling that underlies the call for protest) and the definition of minimum services (as a way to safeguard the provision of essential services for the functioning of the economy) are two regulatory tools that can be used to monitor strike activity (calls for strike and actual strikes).

Secondly, we propose to look at the strike as the *product of a collective decision* built upon the “*sum of efforts*”. It is true that the decision to go on strike or not depends on each citizen and that there is no obtainment of a collective good without considering the rationality (selfishness) of the individual actor. However, despite this “paradox of collective action”,¹⁰ the strike will be stronger if it is able to gather a greater number of trade union structures moving in the same direction, i.e., if it is able to promote a greater convergence of trade union sensibilities.

Thirdly, one must keep in mind *the scale* in the analysis of the strike. By analyzing social protests between 2006 and 2013 in 87 countries, Ortiz et al. pointed out that the struggle against austerity held a prominent place in such protests.¹¹ However, despite the global character of capitalism, since the legal regimes, wages, working conditions are defined within national borders, it is not surprising that national strikes are the most frequent. And yet, the national scale itself has different magnitudes, as is effectively demonstrated by the Portuguese and Indian cases.

Finally, we consider that any strike must be related to the achievement of *results*. As a conflict, the strike is also part of a process in which the ultimate goal is the achievement of results associated with previously defined objectives. However, the degree of achievement can happen in the short, medium or long term.¹² Yet, the fact that the achievement of strike goals is often not disclosed to the general public can enhance disbelief in their effectiveness.

¹⁰ OLSON, Mancur. *A lógica da acção colectiva: bens públicos e teoria dos grupos*. Oeiras: Celta, 1998 [1965].

¹¹ ORTIZ, Isabel; BURKE, Sara; BERRADA, Mohamed; CORTÉS, Hernán. *World protests 2006-2013*. Initiative for Policy Dialogue, Columbia University, New York/Friedrich-Ebert-Stiftung, 2013.

¹² COSTA, Hermes Augusto. “Do enquadramento teórico do sindicalismo às respostas pragmáticas”. In: ESTANQUE, Elísio COSTA, Hermes Augusto (orgs.), *O sindicalismo português e a nova questão social: crise ou renovação?* Coimbra: Almedina, 2011, pp. 13-48.

2. Portugal and India: some background elements

Below are some elements providing a background to the Portuguese and Indian contexts.

2.1. Industrial relations and employment systems

In the Portuguese case, the main features of the industrial relations system can be summarized as follows: a pluralist and competitive model of the relationship within and among the representative organizations of labour and capital; strong politicization of collective bargaining regarding working conditions; linkages of trade unions and employer organizations to the system of political parties; the centrality of the state in the capital-labour relationship (despite the legal and institutional frameworks based on the principle of the separation of powers and on their capacity for self-regulation); increasing impediments to collective bargaining.¹³

On the other hand, the employment system has been characterized by low productivity, low wages, a connection between employment and high labour intensity, low levels of education, qualifications and skills, lack of high quality employment and a high incidence of different forms of atypical work: fixed-term contracts, temporary work, part-time work and work in the informal economy (estimated to represent about 25% of GDP).

In turn, in the Indian case, if a political vision of a planned mixed economy lasted until the end of the 1980s, since the beginning of the 1990s, specifically since 1991, the introduction of neoliberal policies in the country became a reality, emphasizing deregulation, reducing the role of the public sector, and creating opportunities for private investment and direct foreign investment. One of the structural features of the Indian labour market is the high percentage of the workforce in the informal sector. Although in principle

¹³ FERREIRA, António Casimiro; COSTA, Hermes Augusto. “Para uma sociologia das relações laborais em Portugal”. *Revista Crítica de Ciências Sociais*. 52/53, 1998/1999, pp. 141-171; Dornelas, António. “Perante a crise: problemas e perspectivas do emprego, do trabalho e da equidade social em Portugal”. *Finisterra*. 65/66, 2009, pp. 101–133; ESTANQUE, Elísio. “Trabalho, sindicalismo e acção colectiva: desafios no contexto de crise”. In: ESTANQUE, E. and COSTA, H. A. (orgs.), *O sindicalismo português e a nova questão social – crise ou renovação?* Coimbra: Almedina, 2011, pp. 49-62; COSTA, Hermes Augusto. “From Europe as a Model to Europe as Austerity: The Impact of the Crisis on Portuguese Trade Unions”. *Transfer – European Review of Labour and Research*. Vol. 18, n.4, 2012, pp. 397-410; FERREIRA, António Casimiro. *Sociedade da austeridade e direito do trabalho de exceção*. Lisboa: Vida Económica, 2012; LEITE, Jorge; COSTA, Hermes Augusto; SILVA, Manuel Carvalho da; ALMEIDA, João Ramos. “Austeridade, reformas laborais e desvalorização do trabalho”. In: Observatório sobre Crises e Alternativas (org.), *A economia política do retrocesso: crise, causas e objetivos*. Coimbra: Almedina/CES, 2014, pp. 127-188.

Indian labor laws cover all sectors of activity, there are provisions that exclude a large amount of the workforce.

At the trade union level, there is a historical division based on political, ideological and regional cleavages that has hindered their recognition as social partners and their access to regulatory bodies (Indian Labour Conference and Planning Commission). There are eleven trade union confederations and tens of thousands of trade unions – with the most relevant in terms of membership being those who are closer to the Hindu nationalist party BJP – seven of which meet the requirements set by the ILC.¹⁴ Of these, only SEWA (Self Employed Women’s Association) has sought to organize workers in the informal sector.¹⁵ Nevertheless, divisions and sectionalism have especially hindered the possibility of joint action and the production of significant impacts on the living conditions of the working class.

2.2. *The legacy of democratic transition*

Despite intense strike activity between the late nineteenth century and the first decades of the twentieth century – 4,636 strikes were registered between 1871 and 1920¹⁶ – the long Portuguese dictatorship (which lasted 48 years) constituted a strong brake on strike activity because strikes were prohibited. Indeed,

Trade unions were permitted, but – through legislation – unique, with compulsory registration, with forced quotas, with a very well-divided territorial structure, with representation by profession as a certifying entity of professional qualifications, with controlled elections and the need of governmental approval of the members of governing bodies.¹⁷

Hence, freedom of collective bargaining was absent and strikes were even considered a criminal offense.¹⁸

¹⁴ In 2011, four conditions for the recognition of trade union confederations were set: a minimum of one million members; spread over at least eight states and a minimum of four sectors of activity; and with a presence in rural areas. BHOWMIK, Sharit. “The Labour Movement in India: Fractured Trade Unions and Vulnerable Workers”. *Rethinking Development and Inequality*. Vol. 2, 2013, p.89.

¹⁵ Ibid.

¹⁶ TENGARRINHA, José. “As greves em Portugal: uma perspectiva histórica do século XVIII a 1920”. *Análise Social*. vol. XVII, 67-68, 1981, pp. 573-601.

¹⁷ ALMEIDA, F. J. Coutinho de. “O papel e as funções do sindicato nos diversos países europeus”. *Questões Laborais*. n.7, 1996, p. 32.

¹⁸ COSTA, Hermes Augusto. *Sindicalismo global ou metáfora adiada? Os discursos e as práticas transnacionais da CGTP e da CUT*. (PhD Thesis in Sociology). Coimbra: Faculdade de Economia, 2005; On the role of strikes in Portugal in the twentieth century, see VARELA, Raquel; NORONHA, Ricardo; PEREIRA, Joana Dias. *Greves e Conflitos Sociais no Portugal Contemporâneo*. Lisboa: Edições Colibri, 2012. On the broader role of strikes from a conceptual and historical perspective, see in particular chapter 9, VAN DER LINDEN, Marcel. *Workers of the world - Essays toward a Global Labor History*. Op. Cit.

Only with the end of the dictatorship and the resulting democratic transition (on 25 April 1974) did strikes strongly reemerge in Portuguese society. The second half of the 1970s witnessed the period of the greatest collective mobilization, which occurred under the influence of a classist discourse that advocated the overcoming of capitalism. In turn, in the first half of the 1980s strikes were aimed at defending “the achievements of April” and destabilizing the right-wing and centrist governments.¹⁹ Meanwhile, the accession of Portugal to the European Economic Community (1986), a moment that coincides with the institutionalization of social dialogue with the participation of trade unions, marked a strong downward trend in the number of strikes (only reversed in 1989, with 307 strikes and 296,000 strikers involved), reaching a record low of 99 strikes in 2007, involving about 29,200 workers.²⁰ Only since the end of 2010, with the outset of austerity, a new intensification of the forms of social protest and strike activity has been witnessed.

In the Indian case, the trade union movement arose during the period of British colonial rule. The first Indian trade union federation was founded on 31 October 1920 (AITUC - All India Trade Union Congress), having had a decisive role in mobilizing the support of the workers for the liberation struggle. During this historical period, the trade union movement remained united, but after independence (in 1947) it underwent a process of fragmentation. Consequently, the trade union movement was affected by fragmentation processes caused by ruptures in the political party system, initially at the national level, but from the late 1960s also at the regional and community levels. Thus, inter-union rivalries, at certain times, took on more intense contours than the conflicts between trade unions and employers. In terms of labour regulation, the state has built a complex and bureaucratic legal system that, although in theory would protect workers, in practice relied too much on lengthy disputes in the judicial system and created obstacles to trade union activity. These aspects, together with the low degree of attention devoted by trade unions to the huge informal sector typical of the Indian labour market, led to their inability to play a key role in structuring labor conflicts.²¹

2.3. *Austerity and liberalization process*

¹⁹ STOLEROFF, Alan. “A crise e as crises do sindicalismo: há uma revitalização possível?” In: VARELA, Raquel (org.) *A segurança social é sustentável. Trabalho, Estado e segurança social em Portugal*. Lisboa: Bertrand, 2013, p. 231.

²⁰ COSTA, Hermes Augusto; DIAS, Hugo; SOEIRO, José. “As greves e a austeridade em Portugal: olhares, expressões e recomposições”. Op. Cit., p.185.

²¹ BHOWMIK, Sharit. “The Labour Movement in India: Fractured Trade Unions and Vulnerable Workers”. Op. Cit.

In the Portuguese context – especially following the adoption of austerity policies – and in the Indian context – especially after the intensification of liberalization in the 1990s – the processes of conflict have increased. In Portugal, the bailout plan signed on May 2011 between the Portuguese government and the *troika*, i.e. the International Monetary Fund (IMF), the European Central Bank (ECB) and the European Commission (EC), has produced huge negative impacts, generating by itself increased strike activity: strengthening of asymmetries in labor relations; increasing precarious forms of employment and of unemployment; fostering the loss of autonomy of social partners, especially trade unions, who were placed in an even more subordinate position; increasing tension in relations between the actors of industrial relations (including the labour field); increasing asymmetries, particularly between high-income and low-income classes, and in the relationship between public and private sectors; creating a sharp drop in household purchasing power; further impoverishment of the productive sector; no reduction of the competitiveness deficit of enterprises.²²

In India, the assault on labour rights took place even prior to the liberalization period that started in 1991. According to Hensman:

the bulk of labour legislation deliberately excludes informal workers – defined as workers either in small-scale unregistered establishments (in India referred to as ‘the unorganized sector’) or as workers in irregular employment relationships – and this provides employers with a variety of ways to evade these laws: splitting up an establishment into small units which are supposedly independent of each other, creating artificial breaks in employment so that workers never attain permanent status, employing large numbers of contract workers on site who are controlled by labour contractors and therefore do not appear on the payroll of the company, or subcontracting production to smaller workplaces. Although in theory informal workers have the right to organize, in practice the lack of legal recognition of their work – or even of their status as workers – makes it almost impossible to organize without being dismissed. And once

²² FERNANDES, António Monteiro. “Uma estranha decisão”. *jornal Público*, 20 June 2012; REBELO, Glória. “Tempo e condições de trabalho”. *jornal Público*, 6 April 2012; GOMES, Pedro Botelho. “Uma bomba atômica social?”. *jornal Público*. 24 June 2012; COSTA, Hermes Augusto. “Wage Cuts in the Portuguese Public Sector: The Negative Effects of a Court Decision on Labour Relations”. *Transfer – European Review of Labour and Research*. Vol. 18, n. 2, 2012, pp. 229-231; COSTA, Hermes Augusto. “From Europe as a Model to Europe as Austerity: The Impact of the Crisis on Portuguese Trade Unions”. *Op. Cit.*; COSTA, Hermes Augusto. “Do contexto das reformas laborais às respostas do campo sindical”. *Cadernos do Observatório sobre Crises e Alternativas*. N. 4, 2015, pp. 1-18. COSTA, Hermes Augusto; DIAS, Hugo; SOEIRO, José. “As greves e a austeridade em Portugal: olhares, expressões e recomposições”. *Op. Cit.*, LEITE, Jorge; COSTA, Hermes Augusto; SILVA, Manuel Carvalho da; ALMEIDA, João Ramos. “Austeridade, reformas laborais e desvalorização do trabalho”. *Op. Cit.*

dismissed, they have no access to legal redress, because there is no legal recognition of their employment or even their existence as workers.²³

Parallel to austerity and liberalization, labour law itself was the subject of transformations, as shown below.

2.4. *Signs of change in labour law*

In line with the austerity measures imposed by the *troika*, several changes to Portuguese labor law were introduced, namely through Law 23/2012 (August 2012). These changes have generated negative effects on the labour market: a company can now choose who to dismiss in situations of job extinction; dismissal for unsuitability became broader-reaching; reductions to overtime pay were introduced; individual working-time accounts (*bancos de horas*) were created; severance pay in the case of dismissals was reduced; vacation days were reduced; the number of public holidays was cut; the Labour Inspectorate (ACT/*Autoridade para as Condições de Trabalho*) reduced its controls since firms are no longer required to submit their working-time schedules or agreements on working-time exemptions, etc..²⁴

In India, the most recent attempts to change labour legislation pointed towards the destabilization of stable sectors, with the proliferation of fixed-term contracts and precarious work, and the shift of certain segments of the workforce to informal sectors of the economy as a result of restructuring and productive subcontracting. One of the main attempts to reform labour law occurred during a BJP-led government between 1998 and 2004, which generated the first united response by the trade union confederations. The creation of the Trade Union Joint Action Committee (TUJAC), which organized a series of protest events that culminated in the general strike of 25 April 2001, proved to be key to a winning strategy that blocked this legislative change.²⁵

But the main problem remained the extent of the informal sector. In 1991, before the implementation of neoliberal measures, from a workforce of about 317 million, 91.5 per cent worked in the informal sector. According to recent data, this proportion rose to 93 per cent of a total of 470 million workers.

²³ HENSMAN, Rohini. "Labour and Globalization: Union Responses in India". *Global Labour Journal*. Vol. 1, n. 1, 2010, p. 116. [<http://digitalcommons.mcmaster.ca/globallabour/vol1/iss1/7/>]

²⁴ COSTA, Hermes Augusto. "From Europe as a Model to Europe as Austerity: The Impact of the Crisis on Portuguese Trade Unions". Op. Cit.; LEITE, Jorge; COSTA, Hermes Augusto; SILVA, Manuel Carvalho da; ALMEIDA, João Ramos. "Austeridade, reformas laborais e desvalorização do trabalho". Op. Cit.

²⁵ HENSMAN, Rohini. "Labour and Globalization: Union Responses in India". Op. Cit., p.119.

Although in absolute terms the Indian economy has absorbed over 8 million workers in its formal sector over this time-span (from 27 million in 1991 to 35 million today), the workforce employed in the informal sector increased at a faster pace.²⁶

The trade union movement has struggled to cope with the neoliberal offensive. In the formal sector, trade unionism has progressed because of the possibility – albeit with high employer resistance – of trade union recognition within the workplace. This is in fact the main difference between the formal and informal sector and one of the reasons why employers favour precariousness and are interested in pushing the workforce to the informal sector.²⁷ Overall, trade union density is around five per cent of the workforce and collective bargaining covers only one per cent.

In short, both countries have witnessed favourable conditions for an increase in strike activity. At the same time, however, there is a tension between the increasing potential for protest and the fear of job loss or employer persecution resulting from participation in a strike.

3. The role of general strikes

General strikes are, roughly speaking, forms of protest that call for a wide and diverse mobilization. As proposed by Tengarrinha,²⁸ general strikes involve “workers of a profession”, “workers of one or more jobs in a region or across a country” and “workers of all professions in a country”. Let us then see what happened in the Portuguese and Indian cases in recent years, taking into consideration the criteria set out in the introduction of the article, namely, the strike as a mechanism of regulation; the strike as a product of a collective decision, that is, a “sum of efforts”; the role of the scale of analysis; and the question of achieving results.

3.1. General strikes in Portugal

Since November 2010, Portugal has registered five general strikes, all lasting

²⁶ SRIVASTAVA, Ravi. “Employment Conditions of the Indian Workforce and Implications for Decent Work”. *Global Labour Journal*. vol.3, n.1, 2012 [https://escarpmentpress.org/globallabour/article/view/1113]; RUNNING, Katherine. “The liberalisation of India's labour laws within the National Manufacturing Policy 2011: where business power and social policy collide”. *Journal of International and Comparative Social Policy*. Vol. 31, n. 2, 2015, pp. 192-208; BHOWMIK, Sharit. “The Labour Movement in India: Fractured Trade Unions and Vulnerable Workers”. Op. Cit., pp. 86-87.

²⁷ BHOWMIK, Sharit. “The Labour Movement in India: Fractured Trade Unions and Vulnerable Workers”. Op. Cit. p.94.

²⁸ TENGARRINHA, José. “As greves em Portugal: uma perspectiva histórica do século XVIII a 1920”. Op. Cit., p. 579.

one day: three general strikes jointly called by the two trade union confederations, the General Confederation of Portuguese Workers (CGTP), of communist orientation, and the General Workers' Union (UGT), of socialist and social-democratic orientation: 24 November 2010; 24 November 2011; and 27 June 2013. Plus, two general strikes called by the CGTP: 22 March 2012, and 14 November 2012.

i) The regulatory process and its causes. All general strikes witnessed a regulatory exercise that had austerity as its backdrop. Incidentally, that could be noticed in the claims of the reasons for the strike. The general strike of 24 November 2010, was called against the cuts between 3.5 and 10 per cent (from January 2011) in the salaries of civil servants with incomes above 1,500 euros. The strike of 24 November 2011 was convened against the intensification of austerity that, in addition to wage cuts, manifested itself in cuts to holiday and Christmas subsidies to civil servants in 2012, as well as a 50 per cent surcharge on individual income tax and the Christmas bonus. In contrast, the general strike of 27 June 2013 was called to denounce measures laid down in a “Fiscal Strategy Document” designed to operationalize state reform, including: retirement at 66 years of age; increase in the civil service's weekly working hours from 35 to 40 hours; reduction in vacation time; increased contributions to ADSE (health subsystem for civil servants); redundancies for 30,000 civil servants; a special mobility scheme, etc.

In between, there were other general strikes called only by the CGTP: the general strike of 22 March 2012 in response to the social dialogue agreement (entitled *Commitment for growth and employment*) between the government, employer confederations and the UGT on 18 January 2012; and the general strike of 14 November 2012, which was called only by CGTP, but involved another 30 unions from UGT and was considered an Iberian-level trade union strike with a day of action organized by the European Trade Union Confederation (ETUC). In Portugal, that strike was a response to the draft state budget for 2013, which implied a sharp rise in the tax burden.

ii) Sum of efforts and overcoming of antagonistic trade union attitudes. Even bearing in mind the absence of joint action in the 2012 general strikes, it is essential to point out, especially with regard to the three joint general strikes, that they represented an obvious sum of efforts and unification of intention within an often divided trade union sphere. And to reinforce the importance of this joint union action, a figure deserves to be highlighted: the 24 November 2010 strike was, at that moment, the second joint general strike in the history of trade unionism in Portugal (only in March 1988 did the CGTP and UGT join forces in a general strike, at that time against changes to labor legislation). Indeed, this sum of efforts (which always had austerity as its

backdrop) also paved the way for joint general strikes in the public sector, with the most recent one recorded on 13 March 2015.

iii) The scale of the strike. As suggested earlier, public and media space is predominantly structured on a national scale and framed by questions of discourse and of identification with national political communities. And the definition of scale cannot, in itself, be dissociated from the targets of the conflict. Now, even though general strikes meant a joint appeal to the whole of society, its national scale was marked by attacks on Portuguese civil servants, which in Portugal number 600,000 people. It is obvious that the national scale of the strikes had repercussions not only regarding the working conditions of civil servants (through wage cuts and increased working hours, to give two examples), but also in the private sector, with the reductions of compensation for dismissals.

iv) Results? The Portuguese government remained virtually inflexible in their drift to austerity. Accordingly, results achieved by the trade union structures as a consequence of the general strikes are questionable. Incidentally, in 2012, a study conducted in Portugal²⁹ noted that, despite the significant increase in the number of strikes and workers on strike, only 4.6 per cent of demands were accepted, 8.6 per cent were partially accepted and 86.7 per cent were refused. General strikes in Portugal were an important instrument of social critique of government policies and against the advocates of austerity policies in Europe. However, it can be said that since January 2015, the reimbursement of 20 per cent of the salaries of civil servants was no more than a “Pyrrhic victory” in a context where austerity remains and the public debt (supposedly in the name of which sacrifices are dictated) has continued to increase. And as if that was not enough, certain sectors of the labour movement do not always see other European examples of general strikes – as is the case with Greece, with more than twenty general strikes in a period of five years – as an inspiration, especially because they do not associate such strikes with the achievement of concrete results.³⁰

3.2. General strikes in India

In recent years, India witnessed four general strikes – 28 February 2012, 20 and 21 February 2013, 5 December 2014, and 2 September 2015, which corresponded to a new dynamics of joint action around the TUJAC and to the

²⁹ REBELO, José; BRITES, Rui. *A comunicação sindical da CGTP-IN*. Lisboa: CGTP, 2012, pp. 75-77.

³⁰ COSTA, Hermes Augusto; DIAS, Hugo; SOEIRO, José. “As greves e a austeridade em Portugal: olhares, expressões e recomposições”. *Op. Cit.*, p.181.

incorporation, at the heart of their agenda of demands, of the issues related to informal employment.

i) Regulation on behalf of concrete demands. In their regulatory procedures, these strikes evidenced a diverse set of grievances and allowed for the expression of specific claims: the struggle against the rising cost of living; denouncement of the continued increase in fuel prices; demands for job creation; end of the divestment in strategic public enterprises; demands for pensions and social security for all workers in the informal sector, an overwhelming majority in India; and combating the insecurity that prevailed throughout the country.

ii) Sum of efforts in trade unionism and in society. Currently, there are some positive signs that the fragmentation and lack of influence of trade unionism is starting to be reversed. The struggles and strikes for the recognition of trade unions in the workplace have increased. This was the case with the strikes in Maruti Suzuki, the largest car producer in the country, in 2011, but also at other plants such as Honda, Nokia, General Motors and Holol.³¹

More importantly, the eleven trade union confederations began to develop a strategy of unity of action around the TUJAC. They organized a mass demonstration on 20 February 2011 that brought together 500,000 workers in Delhi against rising food prices. Given the government's insensitivity to the demands of trade unions, they have since then changed tactics and decided to call the four nationwide strikes listed above.³²

These shutdowns have had a significant impact in some sectors, and at the centre of their demands were the issues of informal and precarious work. Cumulatively, they interrupted (at least circumstantially) the typical divisions among trade union organizations and managed to join the formal and organized sector of the economy with the informal sector (precarious sectors, which accounted for about 75 per cent of protesters). More recently, the current right-wing government, elected in May 2014 and led by Prime Minister Narendra Modi, proposed the Labor Code on Industrial Relations Bill 2015, which aims to further remove workers' rights that are considered as the main hurdle for expanding employment. This proposal, still awaiting

³¹ BHOWMIK, Sharit. "The Labour Movement in India: Fractured Trade Unions and Vulnerable Workers". Op. Cit, p. 94; NOWAK, Jörg. "Worker's Unrest in Automobile plants in India: Strikes and Occupations at Maruti Suzuki and Bajaj Auto in 2011/12 and 2013". *Global Labour Column*, 66 [<http://column.global-labour-university.org/>]

³² BHOWMIK, Sharit. "India: Nation-wide Strike on 20-21 February 2013". *Global Labour Column*, Number 125, 2013, [http://www.global-labour-university.org/fileadmin/GLU_Column/papers/no_125_Bhowmik.pdf]; BROWNE, David. "Trade unions go on the offensive in India". *Equal Times*, 2014 [<http://www.equaltimes.org/trade-unions-go-on-the-offensive?lang=en#.VRWSIVdgiGR>].

approval from parliament, caused the call for the general strike of 2 September 2015.³³ Unity was broken by the retreat of the trade union confederation linked with the ruling party, but the continuity of this unity strategy does not seem to be in jeopardy.

iii) A gigantic scale. As with the Portuguese case, we look back on a national scale. However, the almost 100 million people³⁴ who joined the protest in 2013 are really impressive figures and give the phenomenon an expression of continental dimensions, in a country where the labour force is around 500 million workers. On the other hand, the scale of the problems reported nationally was indicative of a broader agenda, where the role of public employees, unlike in the Portuguese case, was not the “spark” for the protest. In fact, despite the fact that one of the demands of the 100-million-strong strike was the end of the privatization of the public sector, the problems related to the informal economy – such as setting a minimum wage for all workers and the extension of coverage of the pension and social security systems to the informal sector – ended up dominating the whole protest.

iv) The strength of immediate impacts. The weight of the scale of the conflict (mentioned before) cannot be disassociated from the impact generated by the conflict. Regardless of the fact that there were no short and medium-term results as a government response to the demands of the protesters, it is possible to notice a set of immediate results revealing that the general strike, in itself, caused major consequences that did not go unnoticed. Again, the strike of 2013 can be seen as an example: it affected vital sectors of the economy; the banking system collapsed for two days; the public and private sectors were united in the transport sector (e.g. taxis stopped and nearly 100.000 government buses stayed in the garages); there were notorious actions of solidarity between different sectors (e.g. solidarity from teachers, post offices closed in many states). All of these impacts have put trade unions at the forefront of the construction of emancipatory strategies (articulated with the wider society); they are not just a closed-off social actor.

4. Concluding remarks

In this paper we analyzed the place of strikes – particularly general strikes – in two countries that are very distinct geographically, politically,

³³ BHOWMIK, Sharit. The Labour Code on Industrial Relations Bill 2015: Tough times ahead for labour in India. Global Labour Column, 2015 [<http://column.global-labour-university.org/2015/06/the-labour-code-on-industrial-relations.html>].

³⁴ MENON, Sindhu. When 100 million Indians went on strike. *Equal Times*, 2013 [<http://www.equaltimes.org/when-100-million-indians-went-on-strike#.VRW6W1dgiGQ>].

economically and culturally. Our purpose was to confront divergent and convergent dynamics of strike activity that arise either from the “South of the North” (Portugal) or from the “North of the South” (India). We briefly recover here some ideas highlighted in our analysis.

It is ascertainable that, from the point of view of employment relations, the Indian case is characterized much more by the dynamics of informality, although in both the Indian and the Portuguese cases, there is a concern to tackle the burden of insecurity in the so-called “stable” labour relations. On the other hand, both in Portugal and in India, trade union structures are historically divided, though general strikes have been an opportunity for joint action, which in the Indian case went beyond the trade union universe. The moment of democratic transition in Portugal and of construction of independence in India were also times of opportunity for boosting conflictual strategies. Yet, especially in the last five years, strikes have been on the agenda because of austerity in the Portuguese case, and due to processes of liberalization in the Indian case.

General strikes are directed at the state mainly when it implements changes that correspond to a profound transformation in wage relations. It may seem contradictory that the use of general strikes occurs at a time of further weakening of trade union strength, with the risk of low support, substantial costs and low efficacy, but the use of general strikes emerges exactly due to the absence of other means of influencing political power. Also, the results of general strikes are a way to measure their effectiveness. At least in the Portuguese case, it was not really possible to claim victory despite the strong support for most of the general strikes held. In this regard, the Indian case appeared to show, at least regarding the immediate impact of a general strike, the force of a broad mobilization and hence the idea of paralyzing the country due to a massive protest. Be that as it may, however, in one case as in the other, the context of austerity and liberalization pushed general strikes into a more defensive strategy rather than an offensive one.

In fact, rather than offensively targeting the achievement of better wages, working hours or working conditions,³⁵ general strikes in both countries aim to defensively prevent more austerity and privatization by governments and employers,³⁶ i.e., to reject setbacks to the social structure.

Nevertheless, general strikes increasingly involve more impoverished citizens, whose dignity has been undermined. In this sense, they are also

³⁵ TENGARRINHA, José. “As greves em Portugal: uma perspectiva histórica do século XVIII a 1920”. Op. Cit., p.580.

³⁶ NOWAK, Jörg; GALLAS, Alexander. “Mass strikes against austerity in Western Europe – A strategic assessment”. *Global Labour Journal*. vol. 5, n. 3, 2014, p.312. [<https://escarpmentpress.org/globallabour/article/view/2278>].

strong reactions against the loss of rights that so many generations of workers fought for and that appeared to be irreversible achievements; the unequal distribution of wealth (translated in the forfeiture of wages and pensions, the increases in working hours, work intensity and taxation, and bailouts in favour of the wealthy); the neoliberal common sense that claims that there is no alternative to the impoverishment of the majority and the emptying of democratic choices; and the disproportionate power of financial capital.³⁷

Therefore, the construction of a trade unionism strongly oriented to the world of precarious and informal work comes across as urgent. The influence it may have in the future will depend on its capacity, as a strategic actor, to undertake substantial changes in its *modus operandi*, whether it is dealing with resistance to change and bureaucratic accommodation or with expanding its democratic governance.³⁸ From this point of view, trade union action in countries such as India has been always confronted with the reality of informal work. And despite the fact that trade unions might not have always dealt with it in the most adequate way, they have entered a strategic reorientation that will eventually bear fruits in the near future.

In this regard, the North has much to learn from the South. Trade unionism in the North was built around the Fordist wage relation. The deconstruction of social pacts and institutional arrangements of this capital-labour compromise led to, on the one hand, the loss of institutional strength and, on the other, to a decreased capacity of collective mobilization. Trade unions, in the “post-democratic” era³⁹ do not have close partners in positions of political power, which also impels them to a strategic reorientation in an increasingly adverse context of action. In this situation, they recover approaches to collective action belonging to their historical arsenal of contention and seeking to build social alliances with the most marginalized and precarious sectors of society. Only in this way can trade unions aspire to represent, not only in their interior, but especially outside, the new morphology of the working class.⁴⁰ A closer look of Portuguese unions to the position of the Indian trade union movement in strike processes would allow them to learn some lessons regarding unity needed for joining the public and the private sectors in protest, as well as for

³⁷ SANTOS, Boaventura de Sousa. “A greve geral”. *Visão*, 17 November 2011; COSTA, Hermes Augusto. “O sindicalismo em questão em tempos de austeridade”. In: OLIVEIRA, Roberto Vêras de; BRIDI, Maria Aparecida and FERRAZ, Marcos (eds.). *O sindicalismo na era Lula: paradoxos, perspectivas e olhares*. Belo Horizonte: Fino Traço Editora, 2014, pp. 183-210.

³⁸ COSTA, Hermes Augusto. “Do enquadramento teórico do sindicalismo às respostas pragmáticas”. Op. Cit.; ESTANQUE, Elísio. “Trabalho, sindicalismo e acção colectiva: desafios no contexto de crise”. Op. Cit.

³⁹ CROUCH, Colin. *Post-Democracy*. Cambridge: Polity, 2004.

⁴⁰ ANTUNES, Ricardo. *Adeus ao trabalho? Ensaio sobre as metamorfoses e a centralidade do mundo do trabalho*. São Paulo: Cortez, 1995.

joining formal associative structures (trade unions) and organizations of informal workers.

