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# Organization and Trade Unions Futures

What to expect from new trade unionism

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## Opening Remarks

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*Trade Unions Futures* depicts a synthesis of trends that thoroughly frames the global and globalized context of which trade unions operate under, considering that this context in which modern trade unions are developing their activities is changing.

The challenges that the Unions and their Directorates face today are manifold. In *Trade Unions Futures*, we turn our attention to four aspects that we consider essential for the understanding of these changes. Such as:

- new social movements and government action;
- the forms of differentiated regulation;
- the new challenges for trade union communication and the Web.

Lastly, the main results pertaining to new forms of unionism and the workers' expectations will also be put forward.

# 1.

## Independent Unionism and its potential

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We begin with a short summary of trends that fit the globalized world environment of Unions action. This globalized environment, where the modern unions develop their activities, is in fact changing.

The challenges that Unions and their Leaders must face nowadays are several. As a first step, we focus our attention to four different points which we consider essential in understanding these changes:

- New social movements and the government actions;
- Different forms of regulations;
- New challenges for the Union communication such as the Web.

The context of globalization and technological innovation, raises the question about how different kinds of economic organization and different companies can coexist in this process – even because – today, the competition is no longer national but at a global level. This area is usually made up of different approaches: the regulation approach (RA – *Regulation Approach*), and the different types of Capitalism approach (VOC – *The Varieties of Capitalism Approach*). These approaches have in common the fact that they recognize the different types of production; they are the result of different forms and capitalist institutions. They consider, that in addition to national economic practices, each company has their economic policy, and their practices in business, what can be shaped by the long or short-term.

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In this Sense, there are three processes that affect the way companies reconcile economic practices with others whom are non-economic, namely the labor and union relationship. The first is the institutional context in which the company was born. This context will determinate its objectives as well as the norms and values that will guide it. The second one is related to the practices of dissemination, adaptation and imitation; this process depends on the internal and external pressures to the company, leading it to compete with other companies in the same sector. Finally, the third process is related to independent organizations, policies and practices, these agents, outsiders of the companies can condition their actions and means of carrying out their mission. It is in this context that the industrial action - and in particular the action of the unions - has been abandoned.

However, in regard to regulation and types of relationship established between social partners, it has been felt a change, especially if we consider the tradition of national labor markets on the implementation of European legislation (Larsen and Andersen, 2007). But these new forms of labor regulation are still present in the agreement of tele-work that has been defined between the European Social Partners in July 2002. Tele-work, carried out by people who execute their tasks, away from the facilities of the companies using new information technologies, must offer to the employees the same protections as any other jobs. Since 2000, the European partners have been discussing legislation for tele-work; some countries advocated the application of guidelines, and others advocated the application of an autonomous <sup>1</sup> agreement. Let us see, for example, some cases of application in the European Union (EU) countries.

In the case of Denmark, and on the tradition of the Danish labor market, the application of tele-work was carried out through negotiation between the social

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<sup>1</sup> Indeed, this difference reflects the stance of each country in the EU, its attitude towards the national regulation, and its attitude towards the EU.

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partners. However, unions and professional associations had a different role on this implementation. In Germany, there were different ways of implementing the agreement of tele-work, since collective agreements, joint declarations and guidelines of good practice, and information leaflets on the subject<sup>2</sup>. As far as Sweden is concerned, the social partners played a key role in implementing the regulation of tele-work. But here we must highlight the following: the acceptance of this agreement was different both in the private and in the public, and it also differs, depending on the sector.

Some associations declared not knowing the agreement, others declared not to have any power in its implementation, in some sectors this agreement was just ignored, once their associates displayed no interest in doing their work from home; and among the sectors that have adopted this agreement, we can even distinguished those that have adopted the agreement in full, those who have adopted their guidelines as a guide to good practice and those who have adopted it to their reality. Lastly, in England, the legislation implementation by the State and the Social Partners doesn't have that much power, however, the voluntary agreement of tele-work, meant that the state adopted a role of mediator and controller of the Social Partners through a tripartite negotiation, that could manage its implementation.

All these different positions should not, however, be understood as a decrease in the range of action of trade unions- on the contrary - as an amendment that the union's players should take into account. However, it is often said that established unions are an impediment to the develop a strategy which is not neo-liberal (*Bieler and Morton, 2006*), A *European Trade Union Confederation* (ETUC) is often described as being "*firmly capitalist*": promoted economic stability, market flexibility and employability in Europe and in business. These are the issues that lead us to questioning the role of unions in capitalist social relationship. Their development has led to the emergence of associations such as

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<sup>2</sup> Curiously, there were unions who said that they didn't know this agreement and others did not act, as they considered that this kind of work, was already included in collective agreements already set.

the *Comitati di Base Italiano (COBAS)* and the *Association pour la Taxation des Transaction Financiers pour l'aide aux Cotoyens (ATTAC)*. In fact, emerged from the work context of large organizations and extended their action area, to social partnership and neo-liberal restructuring. So, they consequently generate the social movement union, joining several groups and movements in opposition to neo-liberal globalization<sup>3</sup>. Traditional unions support the traditional three-tier system of social dialogue and show some reluctance in cooperating with the social movements. These, in turn, don't believe in the will of the unions joining them in the fight against neo-liberal reform, but the fight against neo-liberal restructuring can't be understood only at a European level, it should be understood at global level.

Also concerning the issue of new social movements, it is interesting to observe the evolution of the union's image and the unionization during the years of the New Labor government in England (Smith e Morton, 2006, A stable economic environment allowed the *New Labor* - of Tony Blair - to implement their program for industrial relations and labor legislation. As we know, the project of neo-liberal governments from 1979 to 1997 had the exchange market as the basis of the economy. During this period, the Unions status as well as the workers protection was reviewed.

The *New Labor* government in 1997 adopted many of the principles of this neo-liberal government maintaining its conservative governance. It has adopted the neo-liberal project of governance, but sought to sustain the public sector and middle class support. *The New Labor*, has introduced many innovations concerning to employment protection, maternity leave, working hours, unfair dismissal, part-time, fixed-term employment. The nine years of neo-liberal government, allowed a coexistence of conservative legislation on trade unions with industrial action. This cooperation was essential for a great role in labor law,

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<sup>3</sup> Also the European Social Forum (ESF) has joined together representatives of traditional unions, radical unions and representatives of radical social movements. So, it is an excellent opportunity to see if the traditional established unions, are restricting their participation in getting new strategies.



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labor market and a great protection of workers' rights. However, this model was better received in the United Kingdom than in other EU countries. The rights advocated by European legislation were granted in the UK with some restrictions and one example of that is the right to strike, which is under specific regulations (Smith e Morton, 2006).

The union's rights and industrial actions, by workers, in the United Kingdom, had new impetus in 2005 with some strikes and organized demonstrations. Some authors argue that, for the union movement to see their rights recognized, they must ask for their rights of "presence" and "audience" to be recognized. It is necessary for unions to have their right to protest recognized as well as meeting within the work facilities. This will give a new step towards the recognition of unions in the United Kingdom.

It is important to make some notes about union communications.

The fast spread of Internet, new technologies of information and discussion forums, in developed countries Web is the preferred mean of communication between people, organizations and governments. Some analysts also expect that this tool of information, will replace the intermediaries between individuals and government. Others argue that this mean of communication will allow unions to reinvent themselves in the XXI century. So, it begs the question of how the Internet can influence the associations and if can reinforce the position of trade Unions.

The main conclusion of the studies concerning this issue, is that Internet fulfils the gap developed between an individualistic workforce and the sense of solidarity that characterizes the unions (Diamond and Freeman, 2002; Shelley and Calveley, 2007). The data collected from 2001, show that unionized workers have a higher rate of Web usage that non-unionized workers, and also that the activist will have an easier access to the Internet at work facilities. The Unions leaders will have higher rates of use of this tool, as well as the youngest

activists. But the fact that unionized individuals use the Internet alone is not enough: it is also necessary that the unions offer *online* services. The associations should have their own *site* and provide services through their web page<sup>4</sup>.

Internet is also a cheap way to communicate, e-mail, video/audio broadcasts and others. These e-mails can be used to give information to members. At the same time, they can raise the membership to send e-mails to government entities to achieve certain goals. Trade unions and professional associations have already incorporated some online services. The sites contain links to services and databases with relevant information. Some associations, because they have members with great difficulty in accessing the Internet or the use of new technologies, have help lines. The expectation of the authors is that the different services provided by mail or phone can be assimilated into the Internet. The encoded access partner, its history, allows customizing access and services that will be well targeted to their needs.

However, Internet focus the center of the debate on the possibility of "cyber-democracy", as the Web itself will encourage union democracy. Note that on union negotiations not all the points of view are heard. But, with the ease way with which information circulates on the Internet, today, it is possible to all members to make their opinions to be heard.<sup>5</sup>

For all theses reasons, it is good to look in more detail the phenomenon - our focus to this study - of the Independent Trade Unionism and its potential.

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<sup>4</sup> The unions already use the Internet as a mean of communication through informative or interactive sites. The question that rises at this point is whether the Internet will be used as a mean to move members.

<sup>5</sup> Unions at the moment have to listen to all opinions and will take them into account in negotiations. There are already some cases of unions who have seen groups of members taking contrary positions to those agreed by the leaders. Similarly, some unions allowed online voting, together with voting on place, contributing to a greater democratization of the election's process.

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However, it is noted that democratic unionism, free and independent, is assuming an increasing importance and role in democratic advanced societies, and also in Portugal this movement has gained a growing visibility and ability to intervene in the society. The truth is that there were - so far - no scientific studies that would allow systematizing knowledge about this reality.

This framework has seen remarkable progress in achieving its proper space by the Independent Trade Unions, Confederation of Trade Unions (*USI*), established in 2000. The *USI* has - according to data from 2007 - 11 members, representing about 40,000 members, covering a geographic area that includes Portugal Continental and the islands of Madeira and the Azores.

In this context, *USI* has focused on its implementation at a national level. May also be noted that *USI* is making - between 2000 and 2007 - growth rates in the number of members above 40% in the first 4 years of existence, and over 14% in the subsequent period (see table 1.1).

**Table 1.1: Representativeness and number of *USI* - Union of Independent Trade Unions, Confederation of Trade Unions members**

Year	Nr. of organizations	Total nr. of members	Growth Rate
2000	5	25000	-
2004	9	35000	40%
2007	11	40000	14,3%

Source: Congress of *USI*; Coordinating Council Secretariat of *USI*; [www.usi.pt](http://www.usi.pt).

In the scenario of Portuguese independent unionism thrive, and as differentiating factors of the *USI* one can point out a performance oriented by a constant connection to all its members as a whole or individually, rejecting any kind of dome unionism, usually overlooked by the union, political affiliations, in their social activity and labor related to ethics, quality and seriousness in union work,

restoring the credibility of trade unionism as noble function in Portuguese society, a primary objective of intervening constructively and with responsibility in the community, emphasizing the positive and effective dialogue, in its relationship with all members of society, namely public authorities and other social partners and the rejection of the hegemonic pretension of the current Union Center (*CGTP* and *UGT*) to divide among themselves, the representation of Portuguese Workers<sup>6</sup>.

It can, therefore, be read in the Statutes<sup>7</sup> of the *USI*:

1 - The *USI* is an autonomous confederation independent of the state, employers and any kind of associations, namely political or religious, and focuses its actions by means of democratic unionism, free and independent.

2 - *USI* calls for solidarity among all the unions affiliated to it, respecting the characteristics of each of its members.

3 - *USI* calls for abolition of all social and economic injustices by creating conditions for the construction of a democratic society under the Rule of Justice

4 - *USI*'s work is based on periodic elections by direct secret ballot, of their bodies statutorily defined and on the full and active participation of its members.

But it is also important to note that the independent trade unionism is also present in the framework of the European Union (EU), with the several unions of the 25 EU countries represented in the *Confédération Européenne des Syndicats Indépendants* (CESI) e na *Confédération Européenne des Cadres* (CEC).

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<sup>6</sup> This situation doesn't correspond to reality, in which about one third of the Portuguese state is in favor of Independent Unions.

<sup>7</sup> It has been approved by the general-meeting constituent of 18 November 2000. See also the site <http://www.usi.pt>.

Concerning the mission, CESI goals and strategic positioning - a Trade Union with an area of comprehensive institutional intervention - can be read in its institutional presentation:<sup>8</sup>:

1 - *CESI* - Confédération Européenne des Syndicats Indépendants is a Trade Union which brings together trade unions in several countries in Europe, having been founded in 1990. As a European organization, can accommodate as members national unions (sectarian and / or supra- sectarian) and European Unions (sectarian and / or supra- sectarian).

2 - At European level, *CESI* operates in different EU institutions, mainly in the European Commission. *CESI* expresses positions, mostly related to issues of social policy and contributes, through the work of its committees, for decision-making within the European social policy and employment.

3 - In collaboration with *CESI* training agency, the Academy Europe ", the union's members are aware of the latest developments in the European Union.

4 - *CESI* advocates trade union pluralism and sees itself as an interlocutor in the European social dialogue. Its influence, as a political association, must be strengthened linked dialogue partnership at a European level. *CESI* advocate the interests of independent unions, on both private and public sectors, to respect democratic principles and human rights. As a European Union independent, *CESI* is not linked to any ideology or to any political power.

An important issue - that can be inferred from the above text - is precisely the representation and the number of members of *CESI*. It has - according to data from 2007 42 members representing about 8 million members, covering a geographical area that includes the whole Europe. It may also be noted that *CESI* is having between 1992 and 2007 - rates of growth in the number of members, above 12% (see table 1.2).

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<sup>8</sup> See on this respect the site: <http://www.cesi.org>.

**Table 1.2: CESI number of members - *Confédération Européenne des Syndicats Indépendants***

Year	Nr. Of Organizations	Total Nr. Of members	Rate of Growth
1992	15	4 406 000	-
2000	28	5 605 000	21,4%
2004	35	7 000 000	19,9%
2007	42	8 000 000	12,5%

Source: CESI European Congress, *CESI* Secretariat of the Presidency, [www.cesi.org](http://www.cesi.org).

Concerning to legacy, *CESI* targets and strategic position – an Union Confederation more devoted to leaders unionism, it is possible to read on its institutional presentation: <sup>9</sup>:

1 - The European managers are among the first, to understand the importance of being organized at an international level. In 1951 the confederations executives French, Germans and Italians have created the ICC (International Confederation of tables), driven by the desire to participate more actively in the European social dialogue, this international confederation has taken, on a European level in 1989, giving arise to the *CEC - Confédération Européenne des Cadres*.

2 – Today, *CEC* is one of six European Social Partners. Through its national professional organizations and associations, represent 1.5 million managers in Europe. The European Social Partners are: *ETUC*, *EUROCADRES* and *CEC* from the worker's side, and *BUSINESSEUROPE*, *CEEP* and *UEAPME* from the employer' side.

3 - *CEC* promotes and advocates the interests of managers in Europe. It represents specific points of view from the leaders, to the European institutions. *CEC* is an independent social partner in

<sup>9</sup> See in this respect the site: <http://www.cec-managers.org>.

the European social dialogue. Although independent *lobbies* of leader's opinions and interests, CEC cooperates with all social partners to build a free Europe to promote the principles of social order and dynamics in a globalizing world.

4 - CEC considers as positive, not only the globalization impacts but also that the simple profit maximization; however, it may not be the single purpose of business and European integration. In addition to its performance in CEC believes that compliance with social obligations that is an added value for companies operating in the long term. With regard to this, European Union managers are clearly in accordance not only with the principle of efficiency and competition, but also with the social market economy.

Concerning the representation and CEC number of members - and according to latest data from 2007 - it has 27 members representing about one and a half (1.5) million members, covering a geographic area that includes the whole Europe (see Table 1.3).

Table 1.3: Representativeness and number of members of the CEC - Confédération Européenne des Cadres			
Year	Nr. Of Organizations	Total nr. of members	Tax of Growth
1989	14	-	-
2000	23	-	-
2004	26	-	-
2007	27	1 500 000	-

Source: Secretariat of the Presidency of the CEC; [www.cec-managers.org](http://www.cec-managers.org).

There are important ways of defining and specifying recognition of what is an Independent Union, mostly in the Legal System of the United Kingdom in the *ERC - Employment Rights Act 1996 and the TULRCA - Trade Union and Labor Relations (Consolidation) Act 1992*.

In the synthesis of the two documents we can read <sup>10</sup>:

<sup>10</sup> See in this respect the site: <http://www.certoffice.org>

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1 - The definition of Independent Union includes "the Unions that are not under the domination or control of an employer, a group of employers or, one or more employers' associations" and also, that "they are not influenced by financial support or material of that type from groups or associations, designed to control of these Unions."

2 - In addition, the *Certification Officer* is the one that, in practice, determines the condition of a union independence, there is a standard set that unions must respect and which summary is in the leaflet "*Guidance for trade unions wishing to apply for a certificate of independence*".

3 -Subsequently, it is, issued a certificate of independence by the *Certification Officer* certifying the condition of independence of the Union, it may, however, be withdrawn if the government understand that the union has no longer this specificity.

In terms of specifics of independent trade union movement we can - from a content analysis of documents and web sites of the different European Union - identify the specifics summarized as follows (see table 1.4).

Table1.4: Independent Trade Union Specifications
Unionists
<ul style="list-style-type: none"><li>- Autonomy with independence of the state, employers and political and religious associations</li><li>- A file of European ideas</li><li>- A level of social dialogue and consultation linked to the management of companies and organizations</li><li>- Independence-term of interests of the constraints of union action</li></ul>
Social
<ul style="list-style-type: none"><li>- An emphasis on providing services to its members and beneficiaries</li><li>- Extent negotiations focused on two levels: global and local</li><li>- Defense of continuity both economic and financial health of companies and organizations</li><li>- "<i>Mind-set</i>" focused on workers in their interests, and career paths</li></ul>
Organizational



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- Independence in the election of the Leaders
- A professional management of the services
- Participative management with financial interests in companies

Source: Analysis of the Author.

## 2.

### The Nordic Model and its potential

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The 1990's saw the rebirth of the interest in discussing the tripartite model of governance trying to give the answer to more sustained, the question of how best to divide the responsibilities between Government, Employers and Trade Unions.

A case study - comparing the four themes of the welfare state in Denmark - has shown that the boundaries between the policies of the welfare state and collective bargaining are blurring (Mailand and Andersen, 2005)<sup>11</sup>.

Other recent studies show that the tripartite coordination policies still have an important role in regulating the labor market, despite the weakening of unions.

The following table shows precisely, the division of the State and the Social Partners in a general point of view. This model proposes four different kinds of governance, excluding unilateralism (see table 2.1)

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<sup>11</sup> Issues related to the welfare state are in the collective agendas, and issues related to work are the regulatory laws, often there is participation of social movements in policy formulation and implementation.

Table 2.1: Four models of governance with social involvement of social partners

	Consultation	Coordination	Self-Administration	Self-Regulation
Role	Deliberation on the vision of the social partners on the Draft Legislative	Negotiation of the Government with the Social Partners	Partial delegation of authority to the Social Partners	Voluntary agreement between the Social Partners
Role of State	Consideration of the interests affected, but these may differ	Dealing with the Social Partners, may threaten intervention	Partial delegation of authority, remains the reference parameters and states	Facilitation: extension <i>erga omnes</i> may threaten action
Role of Social Partners	Joint opinions and recommendations	Negotiation of agreements; strength to <i>compliance</i> of members	Supervision and implementation	Bi-party agreements and their implementation
Model of Decision	Positions majority / irrelevant	Voluntary Agreement	Decision of the majority	Voluntary Agreement
Potential threats	Voice, output	Output	Voice, output	Output
Advantages	Deliberation; processes of legitimating	Coordination of public and private actors, social consensus	Deliberation; legitimacy of processes	Internalization of costs, self-determination
Issues	Lengthy process;	Decision of	Protection of	Risk of

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	defending the <i>status quo</i> , without agreements	power, dangers of defection	the <i>status quo</i> , lack of skills; bureaucracy	collision; interests strict; exclusion of the State
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Source: Andersen and Mailand, 2005.

Looking at specific cases - and paradigmatic - from 3 European countries - Denmark, Netherlands and the UK - a more detailed analysis allows us to understand the differences between them.

Denmark has a model of industrial relations bipartite, with a centralized system where negotiations take place between the Social Partners participating in the formulation of labor legislation and its administration. However, this doesn't imply that there are no tripartite negotiations in some areas: in the 1990's there were attempts to establish a tripartite structure to reach agreements such as "social pact", and although these attempts have not produced a social pact, this tripartite model played an important role in the late 1990's with a regulatory statement of wages.

In Denmark the first pension fund was established in 1900; in the 1980's only one third of the population was covered. But when, during the 1980's started the debate on pension funds, employers feared that these funds were dominated by trade union representatives. There was, at that time, unilateral attempts by the Social Partners to legislate on the subject. However, the state is the only responsible for the regulation, financing and payment of pensions, while occupational pensions are regulated by the Social Partners. Moreover, and concerning on going training, the social partners also have a continued involvement: here the predominant opinion, although occasionally, is put into practice, consultation. And in this area, there have been implemented tripartite directorates due to the different jurisdictions between the State and its Social Partners.

In Netherlands, we find an ideal type of neo-corporatism which in 1990 introduced a set of reforms of the welfare state and labor market often with the

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participation of social partners and sometimes on the form of social pact. These reforms have contributed to sustained growth in employment during the years 1980 and 1990. In terms of on going training, the distribution of labor is very important: Netherlands is the European country that invests more in lifelong learning, and government funds are intended mainly for the unemployed and people with less training. The collaboration and consultation are highlighted between the government and the social partners.

The pension system is managed by the government, however, restrictions on pension funds in the country takes pensioners to challenge the social actors to manage them. However, the state is forced to put more pressure on taxpayers with more economic means to face the needs of the country.

In the UK, there has always been a great difference between the government and social actors, especially during conservative governments. However, since 1997 the role of trade unions had great recognition and were implemented several programs matching to tripartite governance such as the *Low Pay Commission*. Blair's government has made great strides regarding the involvement of social partners. Employment policies remain exclusively, a state responsibility, and the consultation is rare. Self-regulation and self-management are weak, but the truth is there were already taken some steps in that direction. One example is the agreement signed between the Confederation of British Industry and the Confederation of British Trade Unions for the inclusion of ethnic irrelevant issues, which can be misconstrued as self-governance.

Pension funds are managed by a third-party actor, which is independent from the State and the Social Partners, and is managed according to market logic. The British pension fund is the Europe's largest and the most self-sufficient, even if regulated by the market, the pension fund is legislated by the state and its social partners participate through consultation and commissions, not having real power to cause any changes. In on going training, in the United Kingdom, has been observed a gap of qualified employees and several governments had defeat to overcome this shortcoming. Although the demand for professional certification starts by the majority party employers, collective bargaining has improved prominence in this field.

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We must emphasize the coexistence of more than one type of governance in all countries analyzed. The conclusions of this study are synthesized in the table below (see Table 2.2) that summarizes the different positions of the three countries:

	Denmark	Netherlands	United Kingdom
Pension funds	- Consulting	- Consulting	- Consulting
	- Self-regulation	- Self-regulation	- Self-regulation
Regulation	- Consulting	- Consulting	- Consulting
	- Self-regulation	- Self-regulation	- Self-regulation
On going	- Consulting	- Consulting	- Consulting
Training	- Self-regulation	- Self-regulation	- Self-regulation
Coordination	- State unilateral	- Consulting	- Consulting
Work-private life	regulation	- Self-regulation	- Self-regulation
	- Self-Administration		

Source: Andersen and Mailand, 2005.

Another issue that also rises now is: the dialogue between social partners, and the weak state intervention which are crucial to the success of flexicurity model (Andersen and Mailand, 2005)?

As we know, the Danish market is today known for its flexicurity. The basic idea is that, to keep unemployment low, the market must have a strong tendency to relax and adapt to business needs. However, this flexibility is maintained without compromising the security of individuals. In fact, Denmark is a country more flexible in regard to the European labor market<sup>12</sup>. Yet, when we look to OECD data regarding the rate of protection of employment legislation, we note that these agreements and negotiations with the Social Partners are not an impeding to the flexibility about hiring and firing. But being one of the most flexible

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<sup>12</sup> The same can not be said for flexibility in hiring and firing. One explanation is that the conditions of hiring and firing are ruled by agreements with the social partners which impose some conditions.

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markets of OECD, Denmark can ensure the safety of workers. How? To understand how this balance is achieved, it is necessary to look at some features of the Danish market.

First, we must emphasize the remarkable unionization growth rate of the population: in public sector, all employees are unionized and on private sector unionization rates are around 80%. The competition between unions is almost zero, and Trade Unions as well as Professional Associations find themselves subjected to the same trading scheme, a system that can be described as voluntary. In turn, is not the state that must recognize the organizations of the labor market. The workers and the employers must recognize their right to organize and to work together to defend their rights.

The flexicurity, as the name suggests, implies the flexibility of the labor market without neglecting the safety of workers. The term has gained momentum in 1990 when the European strategy, aimed to create an efficient and competitive economy, characterized by low unemployment, social security and inclusion. It is therefore important to analyze the forms of flexibility in collective agreements.

Regarding internal numerical flexibility - *internal numerical flexibility* - Denmark is the country most flexible in the European Union. The working hours, are the result of bargaining between the social partners, differing in this point from the other European countries. Although in all European countries, there is a bid too flexible working hours, there is always at some point, a law on hours worked. The working hours and their limitations are determined by negotiations and agreements between social partners<sup>13</sup>.

The functional flexibility - *functional flexibility* - allows the company to use its full human potential. Provides the same person, to perform several functions and so, the company can face an increase of work or the occasional faults. This kind of flexibility also means ongoing training of workers. And this training can be linked directly to the specific work of the company or may be in a different area,

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<sup>13</sup> And – in this task – We only need to empathize some limitations in different areas, relating to the minimum number of hours worked that should be implemented by requirement of the UE.

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allowing the employee, a more significant mobility within the labor market. Several agreements have been undertaken in this area so that employees can invest in their training, being given a minimum number of hours that workers are entitled to invest in their training<sup>14</sup>.

Also, regarding wage flexibility - *wage flexibility* - Denmark proves to be more flexible than other European countries. Wage levels and wage agreements are the result of negotiation between different social actors. These agreements may be established by each sector. Comparing with Germany, we can see the arrangements developed regarding wage; however, these agreements are between the employer and a worker's representative. In Denmark, the system is different. Such agreements are negotiated openly and rules are established considering the interests of workers and the sector in which they work. These agreements have sometimes a struggle, caring to the establishment of minimum wages, and rates of remuneration that may be flexible.

Furthermore, there are several kinds of promoting workers security in collective work agreements.

Job security - *job security* - involves the ability to work in the same job for the same employer for a long period of time. The staff income is high in Denmark and the length of time that a worker stays in the same job is low. These data could suggest that the feeling of safety is low. Yet, studies on this subject show that the Danish feel themselves safe at work. This can be explained because the conditions in the country are the result of several agreements and discussions between the social actors. Also at work are taken measures to ensure a safe working environment.

On the contrary, job security, and the security on work - *employment security* - is something guaranteed by the Agreements of Social Partners. The turnover is great, but the creation of new jobs is also significant and, sometimes, Trade Unions and Employers agree with sacrifice on a higher wages level, to ensure the maintenance of jobs. We must also highlight the importance of on going training

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<sup>14</sup> Training, that can be paid by the company, considering this investment in training as an asset for the company.



## Trade Unions Futures

for people that, leaving a job, can be considered capital gains for other companies, training allows the knowledge and skills of workers might - really - gather new needs of the work market.

The security in getting an income - *income security* - when someone is not working it is a very important matter - even crucial - on the flexicurity model. Data shows that Denmark is one of the countries where "unemployment funding is the higher comparing with the rest of European Union countries. This amount allows the great flexibility on the hiring and firing. The workers don't fight for a better security since they know that when fired, they will have a safe funding, very close to the wage they have when they are working. We can see exactly the same with pensions, which are seen, as a safety for life. If the amounts payed during unemployment decline, all the agreements about the roles of hiring and firing should be revised. All the workers will not see lightly the gap of protection on employment, if they will receive a lower amount when unemployed<sup>15</sup>.

The combined security - *combined security* - refers to the possibility of workers can take their time to to perform other functions. Examples are: sabbatical leave, paternity leave or maternity leave and education. The Danish rotation system has assigned too much attention. The employee may take leave to study or to be with family, receiving their payment in full. In turn, the company would get an employ to the unemployment to compensate that gap giving him experience. In the 1990's this type of leaves was widely used, but suffered a decrease in the new millennium. <sup>16</sup>.

In summary, we can identify several areas where significant progress was achieved in collective agreements in recent years.

First, in what concern to the level of decentralization and the regulation of different levels of systems of collective work and flexicurity, decentralization allows resolutions to be taken, and implemented solutions at local level; it means

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<sup>15</sup> In 2004 the Danish parliament tried to lower these values but had the opposition of both workers and employers. Despite having a parliamentary majority, to reduce the values established would lead to a restructuring of working arrangements. And so, the Government had to yield to the social partners on this regard.

<sup>16</sup> Just to emphasis, that only the maternity leave saw its length increased from 6 to 12 months of time.

## Trade Unions Futures

that, enables social actors to find appropriate solutions to their needs. This decentralization is being threatened with the laws at European level, which requires an adjustment on several levels. So, the question arises whether this regulation at different levels undermines the flexibility of the Danish model, if the decision-making at a local level, affects the relationship between flexibility and security, and, finally, if the potential insecurity among workers may reduce flexibility.

Second, question the matter pertaining to the enlargement covered earlier, by the negotiations between the Social Partners, which has been proved to be essential for the Danish flexicurity model. And paternity and maternity leave are a good example. The same can be said about the negotiations on working hours. The issues raised here, are related to the need to continue to expand and diversify, the topics covered by the negotiations between the social actors? And if so, will it have a great contribution to the sense of security than others?

Finally, the question is, flexicurity is it applicable to everyone in the community or if there are areas that it is not enough. The negotiation model labor applies to all sectors of the labor market. However, immigrants are often discriminated against, with lower wages or non-recognition of professional qualifications.

In addition, the salary should be based on the type of work, work environment, skills and competencies. But with it, less productive companies are forced to close. And the more productive companies, that have a financial leftover, can apply this leftover for investment, rather than pay higher wages. These differences on income lead to greater mobility of the business and workers, fighting the inertia of the market. We still must notice - in this context of discussion, the potential of the "Nordic model" - the so-called Swedish economic model (Erixon, 2000).

The macroeconomic principles, where the Swedish system is based on are related to the Gösta Rehn and Rudolf MEIDNER model. This model seeks to be a middle-ground between the Keynesian and monetary policies, combining full employment, price stability and equity. This balance is achieved with a strong taxes policy, employment programs and a selective policy of wage solidarity.

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Rehn-Meidner Model (RM) is – for the above mentioned – an excellent contribution to macroeconomic policies, combining resources and priorities. This model is at the same time a political, a theory of wages and profits, and an inflation and growth program. It is often compared to the modern wage theories and the so-called Scandinavian Model. Although it didn't make direct reference to European politicians, they sympathize with this model indicating that an ambitious employment policy is possible through a restrictive macroeconomic policy.

Gösta Rehn and Rudolf Meidner were critical of the Keynesian model in the post-war because they considered that it didn't fit the objectives of the country. They intended to replace the Keynesian model for a model that keeps inflation in control without resorting to restrictive policies and restrictive in terms of wage. The RM-model has the target of full employment and price stability. Wages of "solidarity" are a way to combat inequalities. This model was extremely innovative at the time; it was developed by giving priority to price stability and full employment. (Erixon, 2000); Being this its main characteristic, the primary target was to maintain growth and inequality.

Another feature is the allocation of more than one goal in each of the tools used. We can also verify that each of these tools is a complement to another. The monetary and taxes policies affect economic growth, so this model may affect the analysis in the short and long-term expectation of a higher profit leads to an anticipated wage increase, and so the unions will demand higher wages in anticipation of this profit.

But in the beginning of 1990th - and during the government of a alliance of conservative non-socialist parties - Sweden experienced periods of great recession. Its position in the list of OECD GDP decrease from 9th to 19th. Unemployment raised and inflation as well. Only in 1996 the situation started turning over. In 1999 only one quarter of the previous position had been recovered.

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The RM model explains this crisis, when he says that full employment will have difficulties every time we have a moment of over-production. We could see then a great demand for skilled labor that has driven prices of the labor force to rise, causing an imbalance between supply and demand and lowering profit margins in the industry. The social democratic governments that followed have also adopted some measures of the RM model, and some directives of Keynesianism. The government's goal was to obtain results in the short term rather than the medium and long term. Followed a strict taxes policy and made available to subsidies for the unemployed, but also for companies that hired these unemployed. Tried to reduce the national deficit and control inflation.

There were several criticisms raised against the RM model. However, the one that stands out is the attempt to reduce wage inequality. This was because other countries have managed to maintain low inflation practicing high salaries. However, this model with the aim of achieving full employment, is still relevant to prominence recently when the European Union has determined to have the ultimate goal of full employment and price stability

We are now able to close this chapter, to identify some of the features and capabilities of the Nordic model, which we summarize as follows (see table 2.3).

**Table 2.3: Features and capabilities of the Nordic model of unionism specifications**

Specific assumptions of the Nordic model of unionism
<ul style="list-style-type: none"><li>- In the Nordic countries the rules in matters of employment and social policy is generally made from the negotiations between social partners and not through the law;</li><li>- The minimum wage is one specific aspect of the law on employment that does not exist in Denmark, Finland, Norway and Sweden, these countries are the sectarian negotiations between social partners that determine the rules;</li><li>- There is a high rate of unionization, often exceeding 85% of the workforce;</li><li>- There is a new willingness and acceptance of workers from the unions and the services provided by them, including the financial and social protection during unemployment, health insurance, subsidized loans or support to individual</li></ul>

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negotiation of wages;

Services that the Independent Nordic Trade Unions provide to their members

- Negotiation of collective agreements,
- Legal protection and advice of individual workers;
- Social protection and financial assistance to workers during periods of unemployment;
- Opportunities for vocational training and lifelong learning;
- Counseling services in negotiating individual wage;
- Health insurance plans and financial reform;
- Electronic publications and paper issues of interest to workers;

Source: Interviews Author of the Leaders and Coordinators of Independent Trade Unions in the Nordic countries.

### 3.

## Inquiry into the Independent Unions: global results

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In this chapter, it will be presented the overall results of the First Survey of the Independent Unions in Portugal.

Considering that - according to data from a recent study - about 20% of Portuguese workers are affiliated with Independent Trade Unions, the elaboration of this study resulted from the need to develop a new generation of policies, indicators and knowledge about the principles and mission of independent unionism.

Were defined as objectives of this study an evaluation of the Portuguese worker's expectations in relation to Trade Unions; evaluation of the current image of unions in public opinion, and a review of the main motivations for the unionization of non-union workers, mainly in young people.

First, these three objectives have been achieved from the application of a quantitative approach, divided into four key steps:

- 1 - Approval, together with *USI*, a guide to survey inquiry applied to a representative sample of the Portuguese population, a logical collection of quantitative information on the expectations of Portuguese workers in relation to the Trade Unions and the current image of Trade Unions on public opinion.

- 2 - Collected information by straight-administered inquiry by telephone.

- 3 - Collected and validated information made, according to the criteria of representation set out, in the stratification of sample, and proportionality on the universe.

- 4 - Treatment and analysis of results.

The quantitative results of the Survey on Unionization in Portugal - 2008 should be read as representative of a universe that includes the entire population with

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16 or more years of age, Portugal residents, in houses with landline phone. However, it should draw attention to the uncertainties and the limitations inherent in any survey: especially that it is a telephone survey and some results are not readily extrapolated to the universe of union members in general or to the universe of union in *USI* in particular (see table 3.1).

**Table 3.1: Technical Survey**

### TECHNICAL SURVEY

Study conducted by Opinion Euro-Survey SA, from 08 to 11 September 2008;  
Telephone interviews, conducted by interviewers, selected and supervised between 19 hours and 22 hours;

The universe is the population aged 16 or older living in Portugal and living in houses with landline phone;

The sample was stratified by region (North - 20.6%; AM Porto - 14.7% Office - 29.2%; AM Lisbon - 25.7%, Korea - 9.8%), with a total of 1010 interviews validated, and random with respect to gender, age and educational level;

1221 attempts were made of interviews and of these, 211 (17.3%) refused to cooperate in the study of Opinion. 1010 interviews were validated, accounting for 82.7% of attempts;

The choice of houses was random in telephone and interviewed in each household; the element that was years less time;

The maximum error of the sample is 3.08%, to a probability of 95.0%.

Specifically, the script of the Inquiry about the Unionization in Portugal - 2008<sup>17</sup> included the following questions:

- 1 - Situation at work;
- 2 - Contractual relationship of the worker;
- 3 - Size of the company he / she works;
- 4 - Sector company in which he / she works;
- 5 - Unionization;
- 6 - Guild membership (Union of *USI* - Independent, the *UGT* union, or union *CGTP*);
- 7 - Time of unionization;
- 8 - Satisfaction with the Union they belong;
- 9 - Importance of factors for change in union membership;

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<sup>17</sup> The complete version can be finding in the Annex of this document.

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- 10 - Importance of factors for change in Portuguese Trade;
- 11 - Degree of importance of the services provided by the Portuguese Trade;
- 12 - Degree of importance given to the specificities of Independent Trade Unions;
- 13 - Age;
- 14 - Gender;
- 15 - Region of residence;
- 16 - Educational.

Let us, now, present the results.

In terms of overall satisfaction with the unions, this study indicates that 65% of Portuguese workers (and of all respondents) are considered generally satisfied with the performance of Trade Unions. Meanwhile, 31% of Portuguese workers are considered dissatisfied in general with the unions (see table 3.2).

**Table 3.2: Level of satisfaction with the Unions**

	Global
Yes	65,0%
No	31,0%
Not know/not answer	4,0%
Total	100,0%

Another issue is the importance assigned to the model of unionism, and service directed specifically to the services provided by the unions, that are most valued by the Portuguese workers (see table 3.3). At this point is to highlight the importance to the Portuguese workers the "legal support" (23.2%), the "health care support" (16.6%) and "training and development courses" (16.1 %). Fourth, we highlight the importance assigned to the "creation of complementary systems for Pensions" (14.3%).

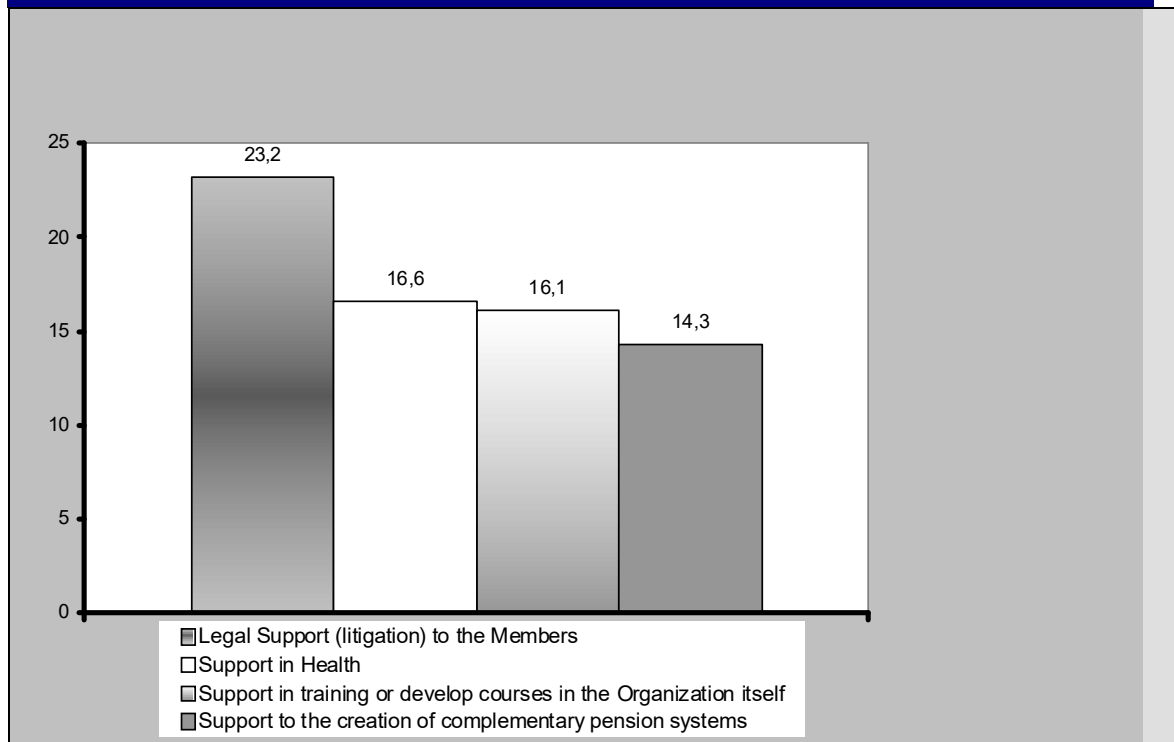


## Trade Unions Futures

Table 3.3: Importance assigned to the Model of Unionism Service

	Global
Legal Support (litigation) to the Members	23,2%
Support in Health	16,6%
Support in training or to develop training by the Organization itself	16,1%
Support for the creation of complementary pension systems	14,3%
Unemployment Support	8,6%
Vocational guidance	10,6%
Kindergarten	4,1%
Support on the conclusion of individual contracts of employment	5,8%
Discounts in stores	0,7%
Total	100,0%

Figure 3.1: Importance assigned to the Model of Unionism Service



Note that the Portuguese workers gave very considerable importance to Unionism Service.

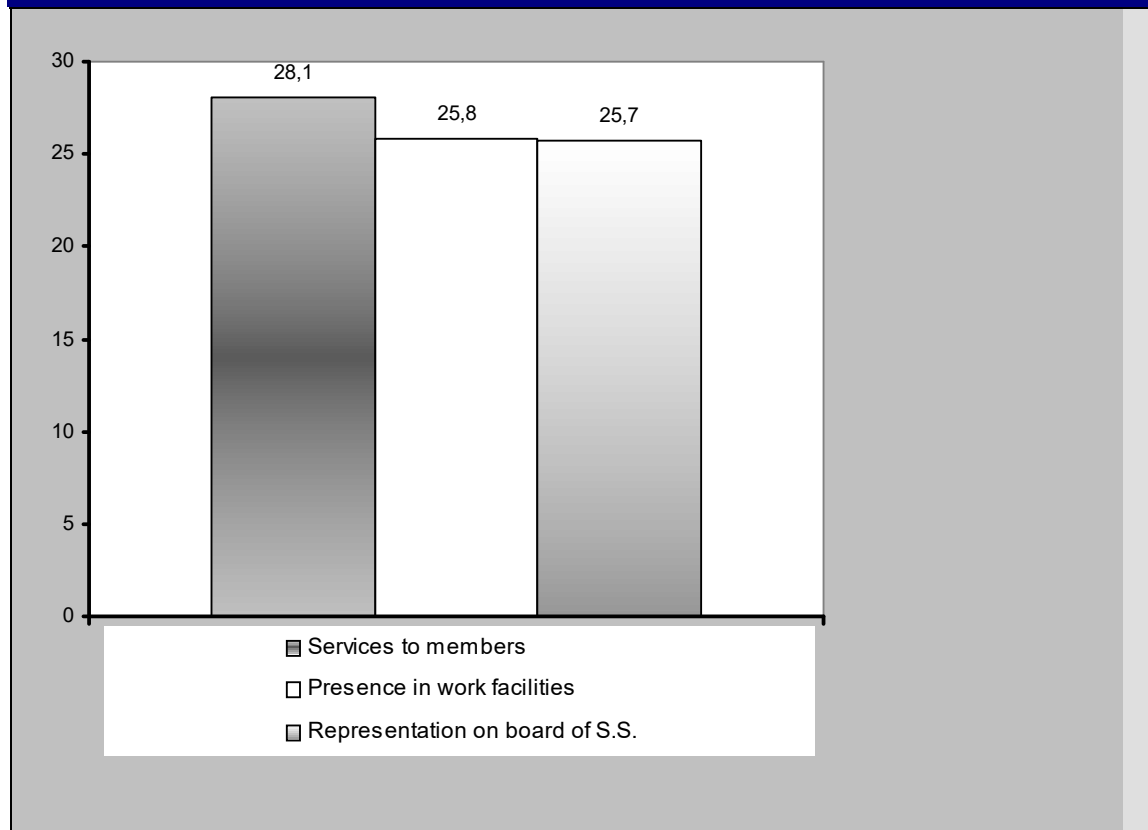
When asked specifically about the key factors that could make them to change of union, more than 28% of Portuguese workers refers to "the services provided by the unions" as crucial to this option (see table 3.4). Furthermore, it is also crucial to the workers the "presence in the work facilities" (with 25.8% of total responses) and "representation in business and in the Board of Social Dialogue" (25.7%). The "independence from political parties" takes the fourth place with 16% of Portuguese workers considering it, as a potential factor in their moving to another union.

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Table 3.4: Factors to change of the union

	Global
Services provided to members	28,1%
Independence from political parties	16,0%
Presence in the work facilities	25,8%
Contact with partners (by post or electronic)	4,4%
Representation in companies and Committees	25,7%
Social Dialogue	
Total	100,0%

Figure 3.2: Importance assigned to Unionism Service (by changing union)



The results of the study in regard to the possible changes in current Portuguese unions (see table 3.5), the issues of an increased claim position (40% consider it

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"very important") and an increase in bargaining power (36% consider it "very important") are high on the agenda of the worker's concerns.

It is very interesting to see that, at this point the independence from political parties is undervalued by Portuguese workers as one aspect of change in the current union universe (59.5% consider it "not important").

**Table 3.5: Issues of change in Trade Unions**

	1	2	3	4	Total
It's Image	15,0%	37,0%	22,0%	26,0%	100,0%
Being more vocal	40,0%	28,8%	25,0%	6,2%	100,0%
Have greater bargaining power	36,0%	20,0%	35,8%	8,2%	100,0%
Be independent from political parties	9,0%	14,3%	17,3%	59,4%	100,0%

For the study of global data concerning the specific model of Independent Unions and its promotion, by Portuguese workers, the results are presented with some spreading.

Consider the fact that 66.2% of Portuguese workers consider "very important and important" that *The Union should have a performance oriented by a constant connection to all its members, individually or as a whole* and in addition, 53% Portuguese workers considered "very significant and important" that *"The Union flag should be linked to ethics, quality and seriousness in union work, restoring the credibility of trade unionism as noble function in Portuguese society"* (see table 3.6). However, we should also have to realize that 67.5% of Portuguese workers consider "irrelevant or unimportant" that "The Union must reject any kind of umbrella unions, far removed from reality" and that 53.5% of Portuguese workers consider "irrelevant and unimportant" that "unions should focus on the positive and effective dialogue in its relationship with all members of society, particularly public authorities and other social partners" (see table 3.6).

**Table 3.6: Valuation of the Independent Unionism Model**

	1	2	3	4	Total
Unions must have a performance pointed	42,2%	24,0%	22,5%	11,3%	100,0%

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by a constant connection to all its members, as a whole					
or individually					
Unions should reject any kind of unionism summit.	12,0%	20,5%	27,5%	40,0%	100,0%
union far removed from reality					
Union flag should be a link to ethics, quality and seriousness in union work, resetting	25,3%	29,5%	20,3%	24,9%	100,0%
credibility of unionism as noble function in Portuguese society					
Unions should be focus on the positive and effective dialogue in its relationship with all members of society, particularly public authorities and other Social Partners	20,5%	26,0%	29,7%	23,8%	100,0%

A note for the characterization of the respondents in this study:

The sector of activity (see table 3.7), respondents are divided first by "public administration" (21.7%), "Industry and Energy (14.9%)," trade "(13.8%) and "construction" (10%). As far as their region is concerned (see table 3.8), respondents are divided under the Central Region (29.2%), the Lisbon Metropolitan Area (25.7%) and North (20.6%).

Table 3.7: Sector of activity of the respondents

	Global
Agriculture and Fisheries	6,9%
Industry / Energy	14,4%
Construction	10,0%
Transport	7,5%
Trade	13,8%
Tourism	7,3%
Financial Sector	6,0%
Administration	21,7%
Other / DK / NA	12,4%
Total	100,0%

Quadro 3.8: *Habitat* region of the respondents

	Global
North (Minho, Douro and Trás-os-Montes)	20,6%
Oporto Área	14,7%
Centre (Beiras, Estremadura and Ribatejo)	29,2%
Lisbon area	25,7%
South (Alentejo and Algarve)	9,8%
Total	100,0%

Concerning the size of the company where the respondents work at, (see table 3.9), we can encompass the companies with 60.8% of the total sample, the following other classes of size in this study, are from large companies - that is, with 500 or more workers - representing 2.3% of Portuguese workers interviewed.

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Regarding the profile of educational attainment (see table 3.10), respondents have - mostly - qualifications up to 12 years of school (74.5% of total). Specifically: 22% have 8 or fewer years of school, and 52.5% are between 9 and 12 years of school. In turn, there are 8.3% of respondents graduates.

**Table 3.9: Company size of respondents**

	Global
1 a 9 workers	60,8%
10 a 99 workers	24,0%
100 a 499 workers	10,8%
500 or more workers	2,3%
DK / NA	2,1%
Total	100,0%

**Table 3.10: Educational level of respondents**

Less than 6 years of school	22%
9 years of school	16,9%
10 or 11 years of school	15,8%
12 years of school	19,8%
Participation in higher education	14,7%
Bachelor	1%
High Degree	8,3%
Post-Graduation	0%
Master Degree	0,3%
PhD	0,1%

The gender of the workers surveyed, 52% are female and 48% are male (see table 3.11). The age of the workers surveyed (see table 3.12), 23.1% are over 60 years, 21.9% are between 45 and 59, and 55% are between 15 and 44 years.

Table 3.11: Gender of employees surveyed

Table 3.11: Gender of employees surveyed	
	Global
Female	52%
Male	48%
Total	100,0%

Table 3.12: Age of workers survey

Table 3.12: Age of workers survey	
	Global
15-24 years	16,7%
25-34 years	19,4%
35-44 years	18,9%
45-59 years	21,9%
More than 60 years	23,1%
Total	100,0%

Regarding the type of contractual workers surveyed in this study (see table 3.13), 39.6% have a "permanent agreement", 22.3% are under a "fixed-term contract" and 14.3% are "Freelancers".



Table 3.13: Employment Contract

	Global
Freelancers / Businessman	14,3%
With a permanent contract	39,6%
Fixed-term contract	22,3%
With a temporary contract	13,6%
Self-Employed	6,4%
Other	3,8%
Total	100,0%

Regarding the profile of Portuguese worker's unionization (see table 3.14), this study considers three indicators, namely:

- Effective unionization;
- Time of unionization;
- Member in a specific Union

The first part - the effective rate of unionization - of the study let us conclude that 44.4% of respondent's Portuguese workers are unionized. Concerning the second part - time to organize - 39% of workers are unionized for more than 3 and less than 10 years, and 37% of respondents are unionized for more than 10 years. Finally, on the third point - the specific union membership - are in this sample 46% of affiliates in the confederation, 40% of affiliates in the *UGT*, and 10.5% of affiliates registered at the *SCU* / Independent Union<sup>18</sup>.

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<sup>18</sup> The difference to the 100% is the percentage of "Do not know / No answer".

Table 3.14: Unionization Profile of Portuguese workers

	Global
Unionized	44,4%
Non-unionized	53,3%
Less than 3 years	21,0%
3 to 10 years	39,0%
More than 10 years	37,0%
USI Union / Independent	10,5%
UGT Union	40,0%
CGTP Union	46,0%

## 4.

### Inquiry into the Independent Unions: unionized workers

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This fourth Chapter presents the results of a national survey on Unionization in Portugal taking in consideration the 400 respondents (44% of the total considered) that are unionized.

The study concludes that - in terms of overall satisfaction with the unions - 72% of unionized workers are considered generally satisfied with the performance of Trade Unions. Meanwhile, 26% of unionized workers are considered generally dissatisfied with the unions (see table 4.1).

Table 4.1: Level of satisfaction with the Unions

	Global
Yes	72,0%
No	26,0%
DK/NA	2,0%
Total	100,0%

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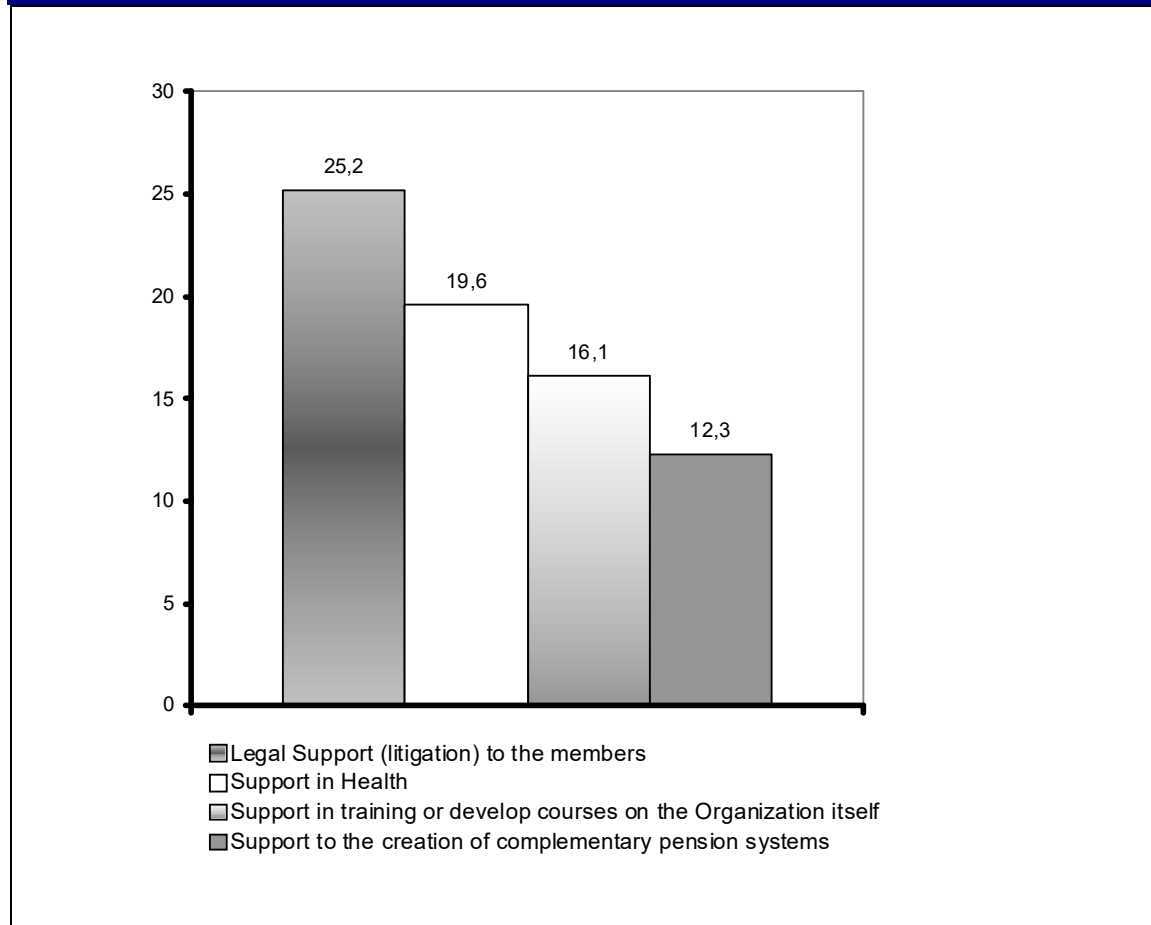
It is also worth highlighting the importance assigned to the model of unionism, and specifically to the services provided by the unions that are most valued by the Portuguese workers (see table 4.2).

At this point, we must highlight the importance for the Portuguese workers of what is called "legal support" (25.2%), the "support in health" (19.6%) and "training and development courses" (16.1 %). Fourth, we must highlight the importance assigned to the "creation of complementary systems for Pensions" (12.3%).

**Table 4.2: Importance assigned to the Model of Unionism Service**

	Global
Legal support (litigation) to the Members	25,2%
Support in Health	19,6%
Support in training or develop courses on the Organization itself	16,1%
Support for the creation of pension systems	12,3%
Support in unemployment	8,6%
Vocational guidance	10,6%
Kindergarten	4,1%
Supporting the conclusion of individual contracts of employment	2,8%
Discounts stores	0,7%
Total	100,0%

Figure 4.1: Importance assigned to the Model of Unionism Service



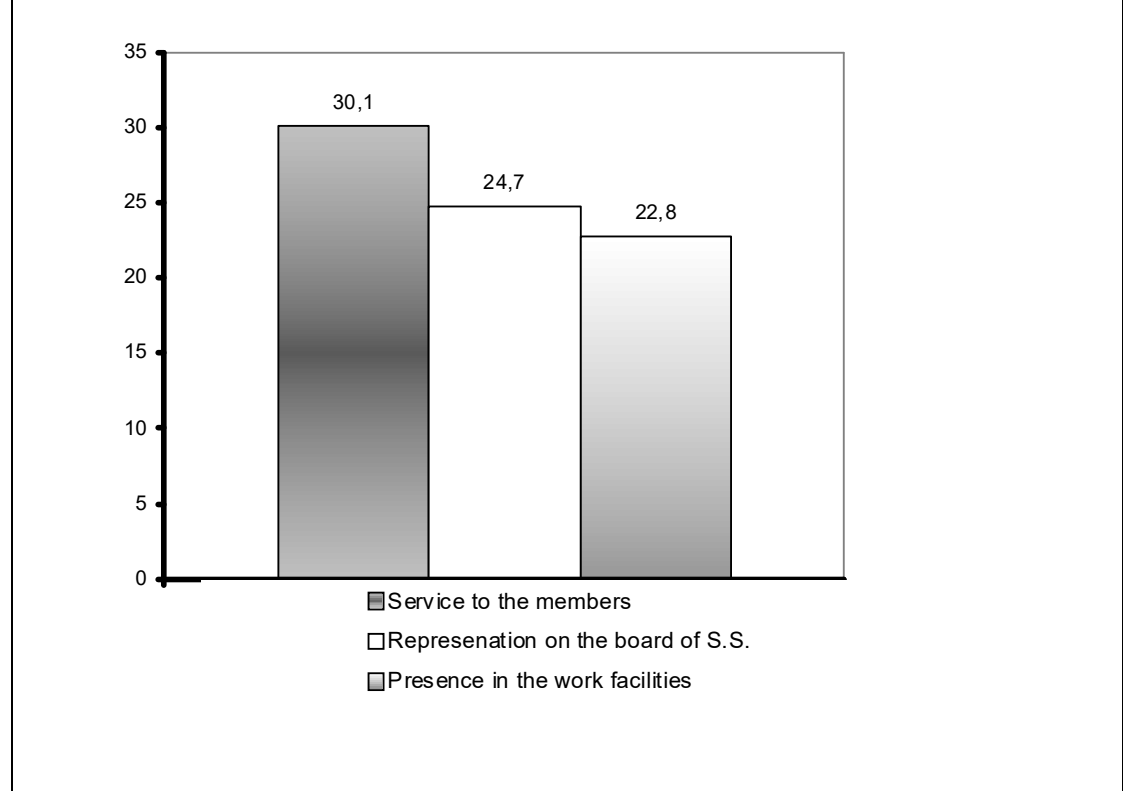
To note also, that the unionized Portuguese workers consider very considerable importance to Unionism Service.

When asked specifically about the key factors that would make them change union, more than 30% of Portuguese workers refer "the services provided by the unions" as crucial to their option (see table 4.3). Furthermore, it is also crucial for workers, representation in companies and in the Board of Social Dialogue "(24.7%) and the" presence in the work facilities "(with 22.8% of the total). The "independence from political parties" takes fourth place with 18% of Portuguese workers union considering it as a potential factor in moving to another union.

**Table 4.3: Issues to change of union**

	Global
Services provided to members	30,1%
Independence from political parties	18,0%
Presence in the work facilities	22,8%
Contact with partners (by post or electronic)	4,4%
Representation in companies and Board	24,7%
Social Dialogue	
Total	100,0%

**Figure 4.2: Importance assigned to Unionism Service (by change Union)**



For the study results concerning the possible changes in current Portuguese unions (see table 4.4) we must emphasize the issues related to an increase in of claiming (71.8% consider it "very important and important") and an increase in bargaining power (46% consider it "very important and important"). In this framework, also the independence from political parties is undervalued by

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Portuguese worker unionized as being one issue of change in the current union scenery (66.4% consider it "not important").

**Table 4.4: Issues of change in Trade Union**

	1	2	3	4	Total
Its image	10,0%	35,0%	26,0%	29,0%	100,0%
Being more vocal	48,0%	23,8%	23,0%	5,2%	100,0%
Have greater bargaining power	30,0%	16,0%	41,7%	12,3%	100,0%
Be independent of political parties	10,0%	13,3%	10,3%	66,4%	100,0%

Concerning the specifications of Independent Unions model and its promotion by Portuguese worker's union, the overall results of the study are presented here focused on two key issues.

In fact, 76.2% of Portuguese workers consider "very important and important" that "The Union shall have a performance pointed by a constant connection to all its members, individually or as a whole ", and this one must add that 55.2 % of Portuguese workers considered "very significant and important" that "The Union flag should be a link to ethics, quality and seriousness in union work, restoring the credibility of trade unionism as noble function in Portuguese society" (see Table 4.5).

However, we should also pay attention on the fact that 71.5% of Portuguese workers unionized consider "irrelevant and unimportant" to "The Union must reject any kind of umbrella unions, union far removed from reality" and in fact 52, 5% of employees understand how "Irrelevant and unimportant" that "unions should focus on the positive and effective dialogue in its relationship with all members of society, particularly public authorities and other social partners (Table 4.5).

**Table 4.5: Valuation of the Independent Unionism Model**

## Trade Unions Futures

	1	2	3	4	Total
Unions must have a performance pointed by a constant connection to all its members, in a whole or individually	31,2%	45,0%	19,5%	4,3%	100,0%
The unions should reject any kind of unionism summit, union far removed from reality	14,0%	14,5%	25,5%	46,0%	100,0%
The Union flag should be to links to ethics, quality and seriousness in union work, resetting credibility of unionism as noble function in Portuguese society	19,4%	35,8%	24,3%	20,5%	100,0%
The Union flag should be a link to ethics, quality and seriousness in union work, resetting credibility of unionism as noble function in Portuguese society					
The unions should focus on the positive dialogue and be effective in its relationship with all members of society, particularly public authorities and other Social Partners	27,5%	20,0%	22,7%	29,8%	100,0%



## 5.

### Inquiry into the Independent: results of the group which left unions

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The fifth point of the study is dedicated to display the results regarding the non-unionized employees", i.e. workers which were already union members but - according to the results of national survey on Unionization in Portugal - were not, at the time, unionized.

In terms of overall satisfaction with the unions, this study also concluded that, 48% of non-unionized Portuguese workers are considered generally unsatisfied with the unions (see table 5.1).

**Table 5.1: Level of satisfaction with the unions**

	Global
Yes	47,0%
No	48,0%
DK/NA	5,0%
Total	100,0%

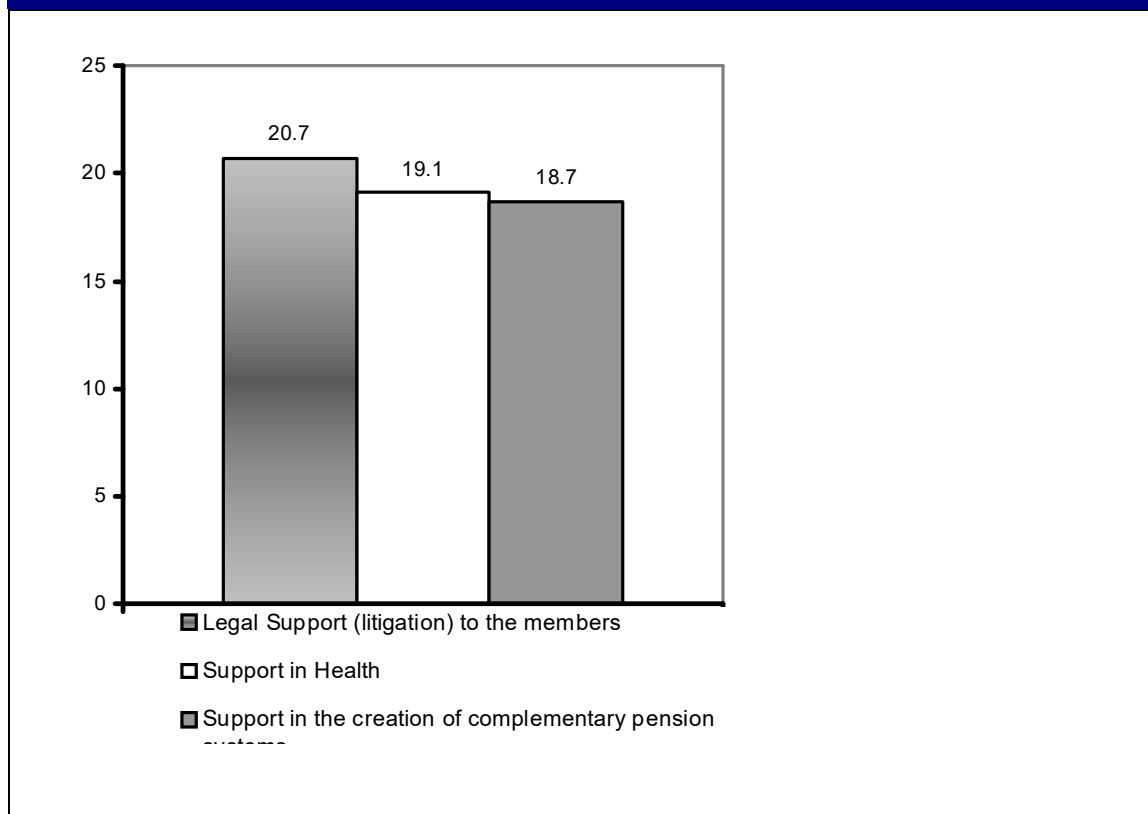
Concerning the model of unionism service, and specially the services provided by the unions that are most valued by workers (see table 5.2), we must empathize the importance, to the Portuguese workers non-unionized, the "legal support" (20, 7%), the "support in health" (19.1%) and the "creation of complementary systems for Pensions "(18.7%).

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**Table 5.2: Importance assigned to the Model of Unionism Service**

	Global
Legal Support (litigation) to the Members	20,7%
Support in Health	19,1%
Support in training or courses developed by the Organization itself	12,3%
Support for the creation of pension systems	18,7%
Support in unemployment cases	10,0%
Vocational guidance	8,6%
Kindergarten	4,1%
Supporting the conclusion of individual contracts of employment	3,7%
Discounts stores	2,8%
Total	100,0%

**Figure 5.1: Importance assigned to the Model of Unionism Service**



We must note that the non-unionized Portuguese workers - when asked specifically about the key factors that would make them change of trade union -

## Trade Unions Futures

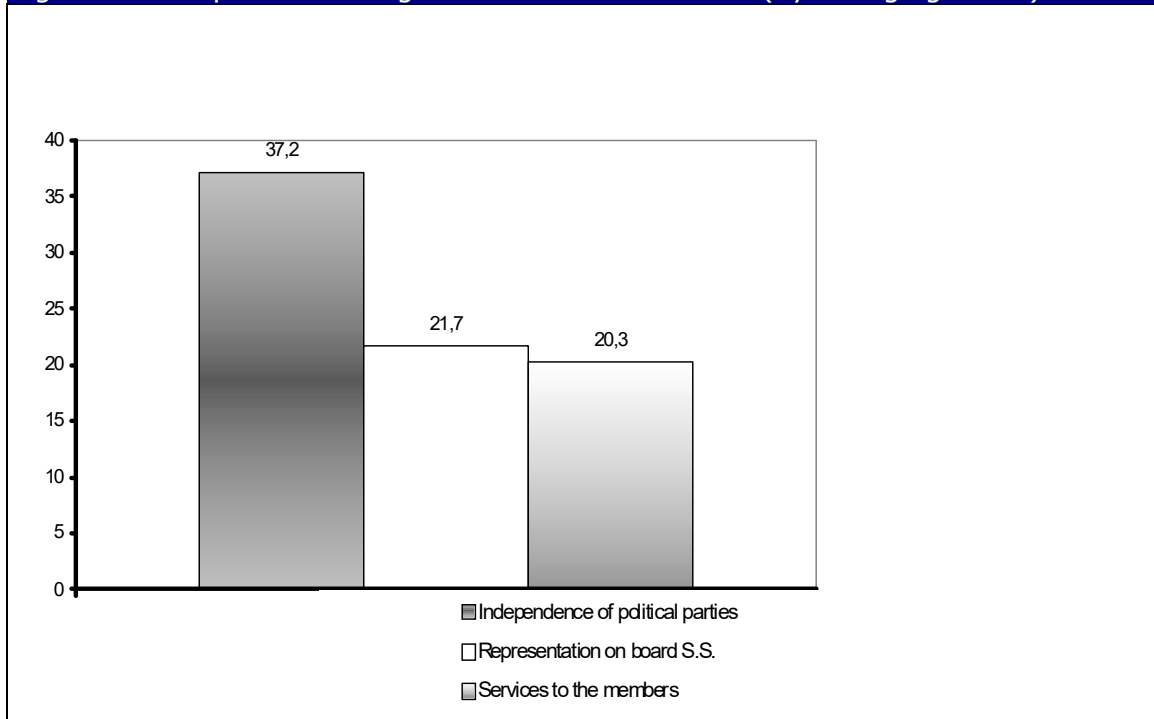
state that "the independence from political parties" (with 37.2% of the total) is a determinant for this option (see table 5.3).

Furthermore, the "representation in companies and in the Board of Social Dialogue" (with 21.7% of total responses) is also crucial for those workers. The "services to members" come in third place with 20.3% of non-unionized Portuguese workers behind it, as a potential factor for moving to another union (see Table 5.3).

**Table 5.3: Factors of union change**

	Global
Services provided to members	20,3%
Independence from political parties	37,2%
Presence in the work facilities	17,4%
Contact with members (by post or electronic)	3,4%
Representation in companies and Social Board of Social Dialogue	21,7%
Total	100,0%

Figure 5.2: Importance assigned to Unionism Service (by changing union)



For the study results, regarding possible changes in current Portuguese unions (see table 5.4), we must highlight the issues of the ability to bargain (with 61.8% of workers considering it "important and very important") and they also linked it to the image of unions (with 52% of these non-unionized workers consider it "very important and important"). Despite of that, the independence from political parties is undervalued by the Portuguese non-unionized workers as one aspect of change in the current scenario of trade unions' movements (49.4% consider it "not important").

Table 5.4: Issues of change in Trade Union

	1	2	3	4	Total
It's image	26,0%	26,0%	26,4%	21,6%	100,0%
Being more vocal	30,0%	31,8%	22,2%	16,0%	100,0%
Have greater bargaining power	25,0%	20,4%	30,2%	24,4%	100,0%
To be independent from political parties	2,5%	8,3%	39,8%	49,4%	100,0%

Lastly, in regard to the specific model of Independent Unions and its promotion by the non-unionized Portuguese workers, it should be noted that 59.2% of Portuguese workers consider "very important and important" that "Unions must have a performance pointed by a constant connection to all its members, as a whole or individually", 53.4% of Portuguese workers non-unionized consider "very important and important" that "The Union flag should be a link to ethics, quality and reliability in union work, restoring the credibility of trade unionism as noble function in Portuguese society "(see table 5.5).

However, it should also be noted that 67.2% of non-unionized Portuguese workers consider "irrelevant and unimportant" the issue of "The Union must reject any kind of umbrella unions, far removed from reality" and, in addition, 57.5% non-unionized workers consider "irrelevant and unimportant" that "unions should focus on the positive and effective dialogue in its relationship with all members of society, specially with public authorities and other social partners "(see table 5.5).

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**Table 5.5: Valuation Model Independent Unionism**

	1	2	3	4	Total
<i>Unions must have a performance pointed by a constant connection to all its members, as a whole or individually.</i>	36,2%	23,0%	23,5%	17,3%	100,0%
<i>The unions should reject any kind of unionism summit, away from reality union.</i>	15,5%	17,3%	19,2%	48,0%	100,0%
<i>The Union flag should be a link to ethics, quality and seriousness in union work, resetting credibility of unionism as noble function in Portuguese society.</i>	15,1%	39,3%	18,3%	27,3%	100,0%
<i>The unions should focus on the positive and effective dialogue in its relationship with all members of society, particularly public authorities and other Social Partners</i>	16,0%	26,5%	33,6%	23,9%	100,0%

## 6.

### Inquiry about the Independent Unions: results of the non-unionized group

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This chapter will display the results of national survey on Unionization in Portugal on surveyed workers whom were not - and never were - unionized.

A first point to remember is that this group of non-unionized workers (see table 6.1) generally considers as positive the role played by trade unions (47.3% of the non-unionized).The percentage of non-unionized workers that have an overall negative perception of the role of unions is of 46.7%.

**Table 6.1: Level of satisfaction with the Unions**

	Global
Yes	47,3%
No	46,7%
DK/NA	6,0%
Total	100,0%

One interesting element, concerns the importance assigned to the model of unionism and service, specifically with the services provided by the unions that are most valued by non-union workers (see table 6.2).

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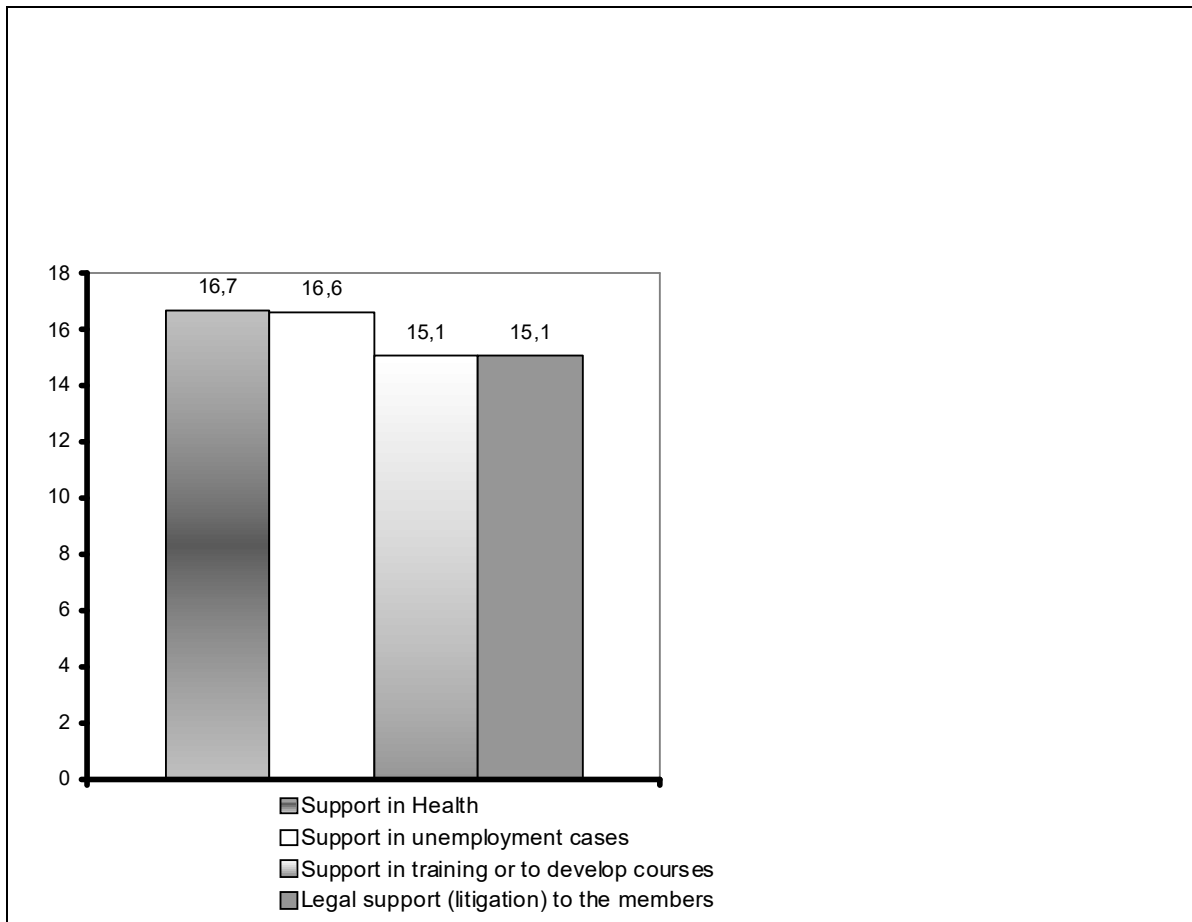
At this point, we must highlight the importance for workers of the "support for health" (16.7%), the "support in situations of unemployment" (16.6%), in "training and development courses" (15,1%), and even the "legal support" (15.1%). Finally, it is highlighted the importance given to the "creation of complementary systems for Pensions" (14.5%).

**Table 6.2: Importance assigned to the Model of Unionism Service**

	Global
Legal Support (litigation) to the Members	15,1%
Support in Health	16,7%
Support in training or develop courses by the Organization itself	15,1%
Support for the creation of pension systems	14,5%
Support in unemployment	16,6%
Vocational guidance	8,4%
Kindergarten	5,1%
Supporting the conclusion of individual contracts of employment	7,8%
Discounts stores	0,7%
Total	100,0%



Figure 6.1: Importance assigned to the Model of Unionism Service

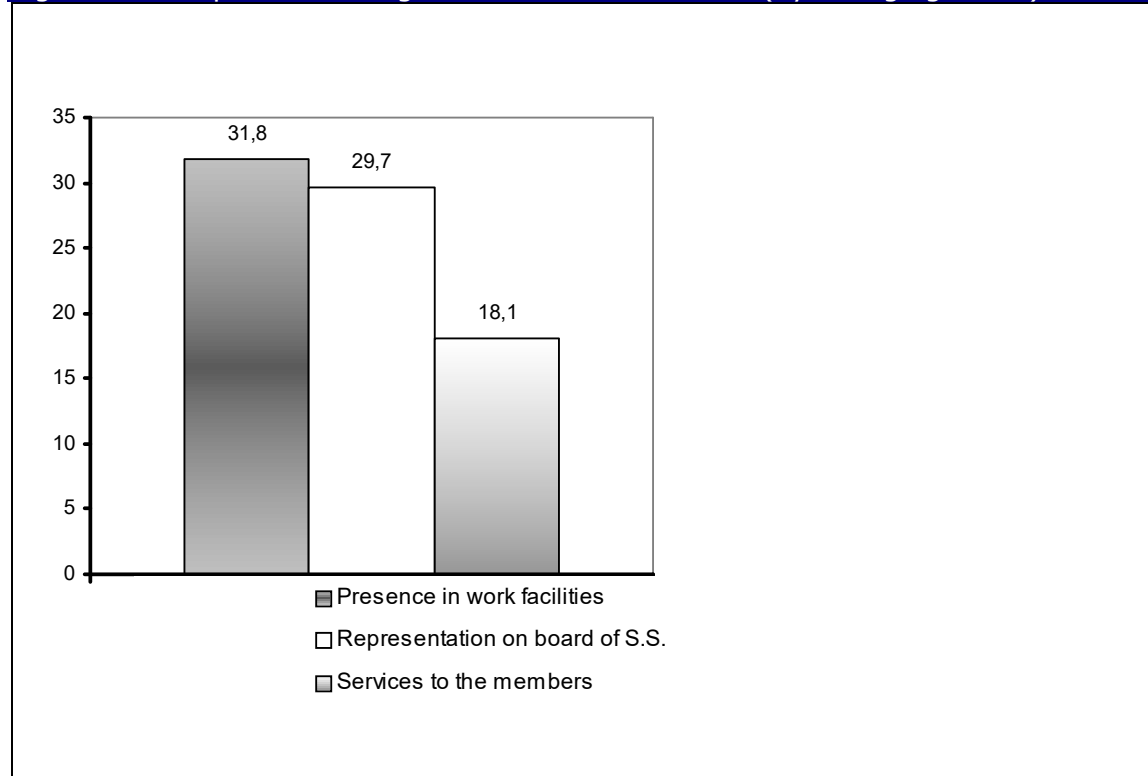


Portuguese workers are not unionized, when asked specifically about the key factors that would make them change their affiliation, 31.8% refer the "presence in the work facilities" and 29.7% refer the "representation in companies and Coordination Social Board", as a determinant for this option (see table 6.3). Furthermore, it is also important to the Portuguese workers non-unionized the "services provided by Trade Unions" (with 18.1% of total responses).

Table 6.3: Factors to change of union

	Global
Services provided to members	18,1%
Independence from political parties	12,0%
Presence in the work facilities	31,8%
Contact with partners (by post or electronic)	8,4%
Representation in companies and Board	29,7%
Social Dialogue	
Total	100,0%

Figure 6.2: Importance assigned to Unionism Service (by changing union)



The results of the study, regarding possible changes to the current Portuguese unions (see table 6.4) its relevant to emphasize the issues of an increasing bargaining attitude (64.3% consider it "very important and important") and an

## Trade Unions Futures

increase in bargaining power (53% consider it "very important and important") which are on the agenda of Portuguese workers not unionized concerns.

**Table 6.4: Issues of change in Trade Union**

	1	2	3	4	Total
It's image	12,0%	27,0%	25,0%	36,0%	100,0%
Be more vocal	34,0%	30,3%	27,0%	8,7%	100,0%
Have greater bargaining power	39,0%	15,0%	32,7%	13,3%	100,0%
Be independent of political parties	31,0%	14,4%	15,6%	39,0%	100,0%

We must emphasize the fact that 51% of non-unionized Portuguese workers consider "very important and important" that "The Union must have a performance pointed by a constant connection to all its members, individually or as a whole." In addition, 41.8% of Portuguese workers considered "very significant and important" that "The Union flag should be a link to ethics, quality and seriousness in union work, restoring the credibility of trade unionism as noble function in Portuguese society" (see table 6.5).

**Table 6.5: Valuation of the Independent Unionism Model**

	1	2	3	4	Total
<i>Unions must have a performance pointed by a constant connection to all its members, as a whole or individually</i>	32,0%	19,0%	27,4%	21,6%	100,0%
<i>The unions should reject any kind of unionism summit, away from reality union</i>	12,0%	10,5%	27,5%	50,0%	100,0%
<i>The Union flag should be a link to ethics, quality and seriousness in union work, resetting credibility of unionism as noble function in Portuguese society</i>	22,3%	19,5%	23,3%	34,9%	100,0%
<i>The unions should focus on the positive and effective dialogue in its relationship with all members of society, particularly public authorities and other Social Partners</i>	15,5%	26,0%	26,7%	31,8%	100,0%

## 7.

### Detailed examination of issues: results of focus group

The seventh point of the study presents the main conclusions in their qualitative issues, based on the analysis of the group interview results - "*focus group*"<sup>19</sup>.

The application of qualitative methodology was shared by three key steps:

- 1 - Preparation, together with the USI, a guide to implement the *focus groups*, of a logical collection of qualitative information.
- 2 - Full transcript of the *corpus*' results and subsequent quality treatment
- 3 - Analysis of results <sup>20</sup>.

The selection of participants in the *focus group* was based on the criteria of importance of the information to be collected for this research. Thus, a group of unionized workers was selected. (See table 7.1).

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<sup>19</sup> The term *focus group* is a group of people selected by the researchers to discuss and comment based on their personal experiences, some of the topics and articles search.

<sup>20</sup> For this analysis we used QSR-NVivo software - NVivo *qualitative data analysis program*; Melbourne, Australia, QSR International.

Table 7.1: Constitution of the focus group

TYPE OF GROUP	Nr. Of Participants	Key goals
Workers Nonunionized	5	<ul style="list-style-type: none"><li>- Evaluate the perception of non-union workers about their image in public opinion</li><li>- To evaluate the main motivations for unionization</li><li>- Collect general and specific information about the image and the strategies of trade unionism Service</li></ul>

The interview had as its main objective the deepening of the survey questions. The following topics were considered for development:

1. Is Unionism changing?
2. How can unions to adapt themselves to changes at work?
3. Are the union leader's too old?
4. How can the union leaders contribute to the modernization of trade unions?
5. Unions and worker participation: how to improve?
6. What is the image among the public opinion? Why?
7. What are the reasons for non-unionized? What reasons could take them to unionize? See case of the youngest...
8. What services can be provided by the unions?
9. How to recruit new and modernization of trade unions?
10. Preparation of some measures and content for training and retraining of trade union
11. Strengths and weaknesses of the current Portuguese' trade union movement.

12. Contributions from the public in general for improvement of Trade Unions.

In accordance with the objectives of the study concerning the interview's *corpus* treatment, 10 categories of information's analysis were established (see table 7.2).

Table 7.2: Rate of analysis of the interviews

CATEGORIES OF ANALYSIS

- Union's image among public opinion
- Portuguese union's Good Practice
- Reasons for unionization
- Reasons for non-unionization
- Highlights from the Portuguese trade union
- Weakness of the Portuguese trade union
- Issues of change in Trade union
- Issues of change in union leadership
- Contents of training for trade unionists
- Type of services provided by Trade

Let us, then, execute a detailed analysis of the qualitative results.

Concerning the image of unions, public opinion, workers interviewed stressed three different issues.

First, a sense of detachment from reality of work and a mismatch on the concerns of the younger workers (see table 7.3).

Table 7.3: Union's image among public opinion

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"I think they're faltering a bit, fighting for inappropriate things of the today's reality, the issues in negotiations are always uncompromising, always appears the counter, never comes up with proposals and solutions. "

"(...) Today I also feel that they just moved away a little, or that they are getting old or so, I think the unions live contributions that go beyond the shareholders. Maybe, due to fewer partners (...) they are a little away from the people, they are becoming a little isolated in a world of their own and, perhaps, and don't intervene so much as they should. "

"(...) By one hand, some unions at least, need to make an oposit speech for a certain kind of workers, or I don't know, if they all still continue to believe in unions. By the other hand, this is bad from the point of view of public opinion. (...) Especially for the younger ... "

"I have an idea of Trade Unions aged, always claiming the same causes, they can't answer to current problems, mainly to the problems of the young people, I think that they are not prepared (...) very well in addressing other current issues that are coming every day in the world of work, to the young and less young, but more to the younger people that are currently entering the world of work."

In the second place, the interviewed workers expressed a concern about the vindictive attitude of Trade Unions, whereas their demand profiles seem inadequate to the Portuguese reality.

There is, however, a difference in profile between the intervention, being *UGT* and *USI* - more moderate - and *CGTP* - more radical and less balanced.

Table 7.3 (cont.)

"What I think, at least in general terms, is that the perception we get, from people is that the unions really do not protect all. It may not be truth, but what Unions seem to show, is that they defend only their own interests. Does this have anything to do with the lack of participation? Once that unions should be our belts (...) "

"Their main idea is that, they must represent what they consider the lower social classe's interests, and that the others don't need to be defended. I see them always in a posture of attack to those who have more stable employment, or those who have higher wages. When I see them in television debates, I see them always defending the working classes, the lower classes of society (...)

"They are never impartial. They always have radical positions; and, I know some people who have been in union negotiations, and what they tell me, is that, when they were talking about the labor economy, or other issues, the opinion that they had was very strange, always saying no to everything, but never saying "let's do so or so instead, so it is very difficult to negotiate with them., they have always measures not viable for the country. "

"I see some difference in the intervention action of the three different Unions, I think that *CGTP* is always more radical as a whole the negotiations' while *USI* and *UGT* are more moderate, rather in social or social democratic governments".

A third point concerning this issue – the Unions image – is about the conscience showed by some of the respondents either in visibility limits of union action among the media, or in the real struggle to give more visibility to the Unions if they don't take part of the professional project of the workers.



Table 7.3 (cont.)

"If we can see on television, in several news programs, in less than two days, the football game player's union, why can't we manage a message while the textiles fall down completely"

"Unions can't get me, if I already have, since the beginning, the idea that Union makes not part of my Professional project. And often I see the Portuguese workers to devote themselves to Unions, only when they have serious problems and are in a most challenging situation in terms of employment. "

Concerning to the Good Practice of the Unions - that is, to the issues that can be retained, as a positive affirmation of trade unions, we must emphasize the importance of the presence on the field and proximity of unionism. So, the figure of the animator seems to be essential for the capture and maintenance of members, in addition, respondents also stressed the issue of personal relationship (see table 7.4)"

Table 7.4: Good practices of the Trade Unions

"This year I have seen no union here (...) to show an action on the role of the union, how the Union can encourage employment on the work market, of a potential employee or not, that I also think it would be great from the point of view of the potential relationship between worker and union. I think somehow that it could direct people to a union. "

Concerning the reasons for the union, respondents emphasized the importance of civic unions, the several benefits and services that these institutions can provide to Members (see table 7.5).

Table 7.5: Reasons for Unionization

"They have time to unionize, but the problem is that we have a class of leaders who have nothing to do with young people. So they are not able to pass this message, is very important that someone be syndicated, as he can have social benefits, because it is not claiming ... the idea of wage claiming issues, that time is over, that we already know, ... is the Government, is the European Community, who dictates values (...). Now we must pass the message, that is an act of citizenship, is an act of participation in active professional life. "

"(...)" The Union is like insurance. "All goes well; the share is merely to enter the taxes, if something goes wrong, they have saved already to have some one to advocate them."

"I think it was very important that people can count on such support, even if it was possible during the time when people are not receiving, during the time that for some reason had no right to unemployment benefit and there are situations of impasse or conflict with entities, and then sometimes take a few months to be solved, where people walk a little to the bumps between the labor inspection and labor court and social security (...) "

Looking from another perspective the reasons for the union, the respondents also mentioned the role of unions in support in the situations of industrial fights, the importance of a closer relationship and their assertive nature and the usefulness of unions in small enterprises, where often there is not even a collective regulation.

Table 7.5 (cont.)

"It should be a new union, modern, with intelligent people, with friendly people, with people who know how to deal with people. Because this issue of sympathy is also important. "

"Concerning the younger, two last questions, related to young adults and their mobilization and also their mobilization to unionism. The use of new technologies, by the leaders and trade unions, Internet sites, e-mail ... (...) Or even e-learning platforms or (...) communication through the Internet. "

"I have an idea that unions currently are able to help very small companies"

The reasons of the interviews for non-unionization are pointed to the determinants of the internal organization of unions and the question of ideology (see table 7.6).

Table 7.6: reasons for non unionization

"I think that there are several factors that determinate this declining of the union movement. One of them is the society evolution: We live in a society too much individualistic. Another factor must be the organization of the Unions themselves.

This is quite a departure of workers and their own unions."

"[There is] a completely decline, which is quite a departure of workers from their own unions."

"Even so, I believe that the young people see little hope in what the unions want, at the moment,. This is how I see the problem; I'm not unionized and there is not in their speeches, or perhaps in the way we listen to the government that motivates me to unionize.

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Besides, the fear of losing employment and precarious employment situation are also covered with some prodding as reasons for non-union

### Table 7.6 (cont.)

"These are three factors that I find important: the fact that some don't find union representation; others have a precarious work and because of that they don't want to join unions; and the fear that others have to unionize, because of an employer. "

"I think it has much to do with the fear of losing their jobs, for fear of retaliation, is a very strong word, but maybe a bad way of looking from the employers. The unemployment, the increase of precarious work (...), and temporary work, also makes people afraid now, afraid of losing their jobs. "

"A person who is not unionized perhaps can be more submissive, maybe go a little out there, in my opinion, my image of people who are not unionized at the moment is not significant."

"I also think that in Portugal there is still too much the idea that the union represents the working class, as there is a new structure of society working in Portugal and in a way to slow, but that will intend to be modern industries with workers skilled and increasingly the professions are educated, and in Portugal there is also the association that the union only defends the working classes or very specific classes of society, then perhaps such classes of managers, most qualified people in society, not to review the unions. "

The strengths points of the Portuguese trade were mentioned by the interviewees particularly about the role of health and employment (see table 7.7)

**Table 7.7: The strengths of the Portuguese trade**

"The first strong point of view of the relationship between the two unions, is that, it is not healthy, there are many strong different points of view in the way that a union should be, that would benefit all workers (...)"

"We live better or worse, if the job is good or bad, we have more or less health if the job is a job with conditions. So, there are, for me, a great lack of information (...)"

Concerning the issue of the weaknesses of the Portuguese trade reported by the interviewees are the difficulties of generational renewal of Trade Unions, and therefore, its managers in the various hierarchical levels (see table 7.8).

**Table 7.8: Weakness of the Portuguese trade**

"There is an old trade unionism which is perpetuated because of the statute that (...) I don't understand how someone can be there, but they exist, and than that unionism are done at the office. There isn't a close union, a union to give information to the other. "

"How can you reach a range of 22-23 years working with people who have a thought, we have union with 65 and 70 years, so it is very difficult to have a modern language."

"For the labor movement, the implications are what we see, which is a decline; it is quite a departure of workers from their own unions. Unions today don't tell them much, nothing, have nothing new to say to young people, to those entering the labor market. "

A key aspect here is also the visibility of Trade Unions issue, in the choices and representations of respondents, and are pointed out as factors the strongest and active presence among companies and workers.

Table 7.8 (cont.)

"As a first option appears the lawyer, not the union."

"I think that things have never been like that, but now, every time things tend more to it."

"I have never heard or seen, during the 5 years that I work in this organization, a single union calling just to know what happened after what they said, to know the point of situation. Nothing. Absolutely nothing. They send what they want, and then, we often have to call to try to understand what they mean and if the entity that was applied also didn't interested to the subject (...)"

"I think that it has to do with a new speech that must be done, the speech must not go through claiming, but to propose and be each time closer to the workers. It seems to me that there is a certain distance between the unions and workers, and the correlation between the unions end up not fostering that relationship".

Also in this issue, of the trade unionism weaknesses, the interviewees indicate as crucial, a decrease in the essential ideological issue and a need for credibility of the union speech.

Table 7.8 (cont.)

"I think that, one of the issues that could eventually change this slump where the unions are, because I think this is just a slump, is actually to separate acts and weapons would be really the ideological issue."

"It is obvious that, over time, I think that, if you put first in the hearts of unions in terms of, what must be really changed, we must have knowledge at all levels, in terms of technical management, sociological ... the need for change ... informatics, statistics, all that... the lack of relationship with the people that are directly linked to them.

There is unbelief.

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The issues of change expected in the Portuguese trade were found to have involved a need to break with the current model and speech. Respondents emphasized the renewal of infrastructure, modernization of services and the organization of a greater presence of unions in providing services to its Members (see table 7.9).

**Table 7.9: Issues of change in Portuguese unionism**

"I think we should all make an effort in that first we hire a new model. The union model of today can't give answers that were given before. Today's workers do not want the same answers from the last 20 years. "

"I think we can modernize as follows: we should have a main union, or, concentrate services where, for example, several unions in the same sector, could have all the same law company, that the several Unions resorted to economies of scale; but then we have unions devoted to low benefits that are unable to offer services such as legal support. That's also one reason that makes the members not accede to the Union itself. Therefore, the main Union, where we could have legal support, that would serve several unions in the same sector and other sectors, also could use the social component. Today it is possible to have protocols, or establish agreements with organizations that give benefits to members. "

Issues of expected change were still linked to the effectiveness of support provided in specific situations, and a service that most respondents want to see is how effective and quick they are.

Table.7.9 (cont.)

"(...) I had a problem in my work and they didn't solved it ... It was not, really not solve the problem, was the way that I was confronted with, to solve the problem. It was: "your problem has all the reasons to be solved, but it will take several years and the best you can do, it's to stay home and tell that you are sick not to have problems (...)"

"There is no dialogue, we can't. Although the person to whom we go, with whom we private, or we know very well, tell us, guide us, and everything, often you can't reach what we want.

Finally, the issues of change were also presented in terms of approach between unions and workers. Most respondents supported a closer relationship with our employees individually, i.e., a personal and proximity relationship. On the issue of change in union leaders we must highlight two essential points. First the generational renewal of managerial staff, and, second, the innovation of the leader's language (see table 7.10).

Table 7.10: Issues of change in union leadership

"(...) Changing people. Maybe, the union leaders are there already for a long time. I don't think you need to be there for many years. People in unions should change after "x" years and leave space to others. Now I could say that for me is" okay, but there are members which could be candidate to the unions. So I don't know how we can evaluate, but if we don't have enough union members, we can't have unions. "

"Maybe if they bet on changing the very image they have, could find people interested in making a list. Because people do not participate, because they don't give importance to the Union, I think, they don't care about care about what they do. If people feel that there is anything that can be done or that unions can do something for them, maybe they have more interest in participating, civic participation and to be candidate to the union, for change ...

"



## Trade Unions Futures

Concerning hypothetical training contents for the union leaders, the respondents reported the need to sell an image - to fill a "gap" that they believed existed - as well as the need for knowledge in the areas of Justice, Marketing and Policy Training<sup>21</sup> (see table 7.11).

**Table 7.11: Contents of training for union leaders**

"Justice, Marketing and Policy training. And then, politico-social in the Sense of to do a little ...for me, we must put the Union, as we do with ecology. So is as citizen, being a good citizen is not to belong to a football team, it's not only not to throw a paper on the grass of the garden, or not let the dog needs to do ... being unionized It is also to be a good citizen, it is a social participation. "

At last, concerning the kind of services provided by unions, respondents mentioned social support - in divorce cases, for example - support in unemployment, information on citizenship at work, and in managing family life and professional (see table 7.12).

**Table7.12: Type of services provided by Trade Unions**

"(...) on the unemployment issue, I think that was very relevant once that each time more and more people, relatively young age people, with small children, when they find themselves on a situation of unemployment, they can count on unions for some particular support. that is what I have in mind, support for nurseries, kindergartens for the children. "

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<sup>21</sup> It should be noted in this connection that the *USI* has - in partnership with *SNQTB* and *ISCTE* - a Program for Advanced Training specific qualifications for leaders and union members, operating since 2006. This is the Specialization Course and the Graduate Unionism and Industrial Relations ([www.iscte.pt](http://www.iscte.pt)).

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Still regarding the type of services provided by unions, respondents pointed several types of social support, medical support in the unemployment, vocational training, support of nurseries in times of great need for workers (see table 7.13).

**Table 7.13: Type of services provided by Trade Unions**

"(...) Medical services, ensure the unemployment benefit, not to return the contribution when people re unemployed, ensuring also a medical support (...)"

"I think, from what I know, that they should be thinking in building a chain of conventional doctors, this is a viable solution but there is the media, the unions could have the specific support of an insurance company, where any union member could benefit from a health care package. On the other hand, I also think that they should bet on, they already provide some training, but I think it should be a little bit more intensive and learning and not those trainings courses of one day, two days. "

"And the problem that these young people have today is where to leave their children and where to leave them with trust. The union, in my point of view, in the bank's sector, for example, why not create a nursery concentrated in certain areas and regions, where unions could provide this service and it is a very important social service and probably will satisfy a lot of workers, worried that they have to go to pick up their child, kindergarten that are closed during the holiday's period, in July and August, and often they are not on vacation and come to work and do not know where to leave their children. "

## 8.

### Conclusions

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This study presented an innovative approach to the phenomenon of Independent Unions - where the growth rates in union members figures have registered above 20% and 40% in the last decade - and to the model on Unionism Service, were retained - from an international analysis - the main characteristics of the Independent Trade Unions, in which stands a great range of independence from the state, employers' associations, political and religious, a guideline at an European level and a great depth of social dialogue and consultation with the figureheads of companies and organizations, and finally, short-term interests of the independence constraints of union action.

In general, the results underline an overall satisfaction with the unions. The present study indicates that 65% of Portuguese workers are considered generally satisfied with the performance of Trade Unions. On the other hand, only 31% of Portuguese workers expressed their great dissatisfaction.

Another important conclusion is the importance given to the model of unionism service and which services provided by unions are more important to the workforce. To the Portuguese workers the following stand out, the legal support (23.2%), the health support (16.6%) and training and development courses (16.1%). We also noted the importance attributed by Portuguese workers to the introduction of a pension complement system. (14.3%).

The study allows us to conclude that the services provided by the unions are the main reason why the Portuguese workers choose to change their union, for exactly more than 28% of respondents weighting in on this option. Let us still highlight the fact that 66.2% of Portuguese workers consider the performance of unions an important element, as is a connection to and with all its members or individually. Workers which are not, today, unionized attribute a great importance to the model of unionism services, and specifically to the services

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provided by the Portuguese Trade Union on legal support (20.7%), to the health support (19.1%) and establishment of pension' complement systems (18.7%).

Also, to note that when asked specifically about the key factors that would make them change union, the concern of the non-unionized Portuguese workers is the independence from political parties (37.2%) is of paramount importance for that option. Portuguese workers are not unionized, when asked specifically about the key factors that would make them consider changing union they often refer the presence in the work facilities (31.8%) and representation in business and in the Board of Social Dialogue (29.7%) as determinants for that option.

Concerning the image of unions as far as the public opinion is concerned, qualitatively, the workers interviewed emphasized three distinct issues: a sense of detachment from the reality of work and a mismatch for the concerns of younger workers; a concern in relation to the vindictive attitude of Trade Unions, where their demanding profiles appear inadequate to the Portuguese reality; and a concern that the limits of visibility of the union, especially in relation to how difficult it is to give visibility to these unions, is not part of the professional project of the workers. Finally, and as one of the main conclusions of this study - New Pathways to Independent Unionism - is surely the fact that, this type of union has a high potential of becoming the benchmark of best-practice guidelines.

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## Annex: National Survey on Unionization

### *INQUIRY INTO UNIONIZATION*

With this inquiry, we intended to improve knowledge about the current image of the Portuguese Trade Union. In your answers to all questions the anonymity is completely guaranteed, so we ask all your attention and sincerity. The average time to complete response is 5 minutes.

1. Can you tell us what your situation, at work is?

- ..... Worker
- Student (END OF QUESTIONNAIRE)
- Unemployed (go to question 5)
- Retired / a (go to question 5)

2. If the worker is an employee:

- Entrepreneur (END OF QUESTIONNAIRE)
- With permanent contract
- Fixed-term contract
- With a temporary contract
- Freelancer
- Another

3. What is the size of the company where do you work?

- 1 a 9 workers
- 10 a 99
- 100 a 499
- 500 or more

4. What is the Sector of the Company where you work?

- Agriculture and Fisheries
- Industry and Energy
- Construction
- Transport
- Trade
- Tourism



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Financial Sector  
Administration  
Other

5. Are you or have you been unionized?

Yes (go to question 6)  
No (END OF QUESTIONNAIRE)

6. In what union are you or have you been entered?

*USI* Union / Independent  
*UGT* Union  
*CGTP* Union  
Don't Know /No Answered

7. For how long are/were you unionized:

Less than 3 years  
3 to 10 years  
More than 10 years

8. Are you or were you satisfied with your union?

Yes (go to question 10)  
No

9. From the following factors please choose the 3 most important, to change in the union (choose top 3):

Services provided to members  
Independence from political parties  
Presence in the work facilities  
Contacts with partners (through mail or electronic)  
Representation in companies and agencies for Social Dialogue

10. The following statements concerning the possible changes in trade unions choose them according to their importance (order from 1 to 4, "1" being the most important reason):

Its image  
Being more vocal  
Have greater bargaining power  
Be independent of political parties

11. From the following services provided by unions, select the 3 most important to you (choose the top 3):

Legal support (litigation) to the Members  
Support in Health  
Support in training courses or development of the Organization itself  
Support for the creation of pension systems

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- Support in unemployment
- Support for the creation of pension systems
- Support in unemployment
- Scholarships
- Vocational guidance
- Kindergarten
- Supporting the end of individual contracts of employment
- Discount stores

12. From the following statements about unions, select them according to their importance (order of 1 to 4, "1" being the most important reason):

Unions must have a performance pointed by a constant connection to all its members, or individually.

Unions should reject any kind of unionism summit, far removed from reality.

The Union flag should be a link to ethics, quality and seriousness in union work, restoring the credibility of trade unionism as noble function in Portuguese society.

The unions should focus on the positive and effective dialogue in its relationship with all members of society, particularly public authorities and other social partners.

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13. Your Age:

From 16 to 25 years  
From 26 to 35 years  
From 36 to 45 years  
From 46 to 59 years  
60 years or more

14. Gender:

Male  
Female

15. In witch region do you live?

North  
Oporto city  
Centre  
Lisbon city  
South

16. What is the most advanced level of educational attainment that you have (without qualification):

Less than 6 years of schooling  
From 6 to 9 years of schooling  
10 or 11 years of schooling  
12<sup>th</sup> Grade  
Participation in higher education  
Bachelor  
Degree  
Postgraduate  
Master Degree  
PhD or Post-doctoral

(THE QUESTIONNAIRE IS COMPLETED. THANK YOU FOR YOUR COOPERATION.)