Received: 30 September 2020 | Accepted: 7 November 2021

DOI: 10.1111/irel.12299

ORIGINAL ARTICLE

Puzzling choices in hard times: Union ideologies of social concertation in the Great Recession

Arianna Tassinari[1] | **Jimmy Donaghey**[2] | **Manuela Galetto**[3]

[1]Max Planck Institute for the Study of Societies (MPIfG), Cologne, Germany

[2]University of South Australia, Adelaide, South Australia, Australia

[3]Warwick Business School, University of Warwick, Coventry, UK

Correspondence
Arianna Tassinari, Max Planck Institute for the Study of Societies, Paulstr. 3, Cologne, Germany.
Email: tas@mpifg.de

Funding information
UK Economic and Social Research Council, Grant/Award Number: ES/J500203/1

Abstract

Using the cases of Ireland and Portugal during the post-2008 Great Recession, we argue that unions' ideological formations around social concertation are central in aiding them to navigate their options about whether to engage in concessionary bargaining with government under crisis conditions. Building on Hyman's triangle of union identity, we show how an ideational perspective can complement interest-based accounts of unions' strategies to explain their engagement with policymakers or their opposition in the macro-management of the economy.

INTRODUCTION

Social partnership or social concertation—that is, bipartite or tripartite arrangements where governments formally engage with organized labor and capital in the formation of public policy—has been an important feature of industrial relations in Europe since the age of Fordist capitalism. A large body of literature, from the 1970s onwards, has been focused, on the one hand, on examining the conditions accounting for the activation of social concertation by governments in different historical periods and socio-economic conjunctures (Baccaro & Lim, 2007; Donaghey & Teague, 2005; Hamann & Kelly, 2004) and, on the other, on accounting for unions' decisions to engage or not in these structured processes of negotiation with the state and with employers (Gumbrell-McCormick & Hyman, 2013). In the extant literature, unions' participation in social pacts has mostly been explained in interest-based terms (cf. Hassel, 2009): Unions strike deals with governments and employer organizations because they can either extract gains for their members or because they can acquire power resources for future channels of influence, especially under conditions of organized labor weakness. Yet, this interpretation of unions' motives for participation in social concertation only partially explains recent developments.

This is an open access article under the terms of the Creative Commons Attribution License, which permits use, distribution and reproduction in any medium, provided the original work is properly cited.
© 2021 The Authors. *Industrial Relations* published by Wiley Periodicals LLC on behalf of Regents of the University of California (RUC).

Since the 2008 Great Financial Crisis and ensuing Great Recession, it has been argued that social concertation in Europe has been in crisis due to unions' declining density and legitimacy, which has reduced governments' incentives to involve them in policymaking efforts (Culpepper & Regan, 2014). More recent enquiries have instead highlighted how, even during the Great Recession, social concertation has continued to be occasionally used by governments of crisis-struck countries to achieve specific goals—such as reassuring creditors about commitment to structural reforms and broadening the domestic legitimacy of adjustment measures (cf. Ebbinghaus & Weishaupt, 2021; Tassinari, 2021). These instances of "crisis corporatism" have created difficult dilemmas for unions. Since 2008, some unions have signed up to concertation agreements with governments and employer organizations that, *prima facie* entailed very limited concessions, while other unions have taken the equally difficult option of rejecting such deals, facing severe risks of political marginalization. While the gains of participation were limited, under conditions of economic crisis and generalized labor disempowerment, the pursuit of more oppositional strategies for unions also did not emerge as a clearly superior option. Explanations based on "rational" interests struggle to account for unions' decisions in such adverse conditions, as the definition of what constitutes interests is not straightforward. How, then, can we understand unions' diverging decisions to sign up or not to concessionary concertation agreements in hard times?

We argue that the process by which unions come to conceptualize their interests is *ideationally mediated* (Hay, 2016) and that, when stuck between a rock and a hard place, unions' deep-seated ideological formations play a central role in the process of navigating "the politics of bad options" (Walter et al. 2020). Drawing on Hyman's (2001) triangle of union identity, we put forward the concept of "*ideologies of social concertation"* to operationalize the sets of deep-seated ideas that unions hold about their role in the political sphere and in the national economy. We show how these long-standing ideological formations interact with more contingent ideas about the specificities of the crisis conjuncture in shaping the process of definition of unions' interests in hard times, thus informing unions' decisions to either maintain their commitment to social concertation, even when this entails extremely limited gains, or to remain committed to conflictual strategies against social concertation, even when these bear scarce or adverse results. We illustrate our argument through in-depth case studies of unions' positions toward social concertation in Ireland and Portugal during the Great Recession (2009–2018), drawing on extensive fieldwork and 45 qualitative interviews with unions, governments, and employer organizations officials in the two countries. To disentangle the specific role of ideological formations and contingent ideas in shaping unions' choices, we compare unions with similar structural characteristics, embedded in the same national context that took nonetheless different positions vis-à-vis social concertation during the crisis.

This article advances our understanding of the politics of social concertation and of union strategy in hard times in three main ways. First, by incorporating the, mostly neglected, ideational dimension of explanations of unions' choices vis-à-vis participation or withdrawal from macro-concessionary social concertation agreements, the article offers a prism through which we can more thoroughly account for unions' "puzzling choices" in challenging situations. This overcomes the limitations of thin interest-based accounts of union action that simply *deduce* interests from observed courses of action and disregard the ambiguity and conflictual processes that characterize the very process of interest definition, especially in crisis junctures. Second, our perspective contributes to understanding the resilience of social concertation at times of organized labor weakness, as it accounts for the continued adherence of some segments of the labor movement to an institution that, in strict material terms, often appears to have exhausted most of its past benefits (cf. Baccaro, 2014). By showing how contingent ideas interact with long-standing ideological formations in shaping unions' choices, our

argument also helps to account for the institutional plasticity of social concertation over time, as it illuminates how actors can update their discursive and ideational repertoires—and thus the meaning they attribute to different institutions and practices—in light of changes in the context within which they operate. Lastly, the article expands the scope of Hyman's "triangle of union identity" to advance a dynamic conceptualization of unions' ideological formations around social concertation, thus far absent in the literature. This heuristic framework can be fruitfully applied to other empirical settings and incorporated into explanatory accounts of unions' strategies and agency in the political and macro-economic sphere, also beyond instances of crisis corporatism.

UNDERSTANDING SOCIAL CONCERTATION: INSIGHTS FROM THE LITERATURE

The literature on social concertation has been dominated by institutional, interest-based accounts. Participating in political exchange by signing up to concertation agreements, the argument goes, may allow unions to extract policy concessions that advance the "material" interests of the membership (Molina, 2006; Pizzorno, 1978) or to pursue their power-organizational interests (Hassel, 2009). Through political exchange with governments and employers, unions not only achieve concrete wage or policy gains but also recognition of their representative role and visibility in public opinion (Molina, 2006). Unions may also choose *not* to engage in political exchange to pursue their power or policy interests, so that they might be able to extract gains by using other strategies, such as mobilization and general strikes (Hamann et al. 2012) or other forms of political action (Hamann & Kelly, 2004). Depending on the contextual factors, non-participation might be a more attractive option than entering into compromises. If the possible long-term benefits arising from restraint (often necessary to participate in political exchange) appear to be outweighed by the short-term costs or if the negotiated solutions appear precarious or unlikely to be delivered, then the actors may also have strong incentives to exit or not enter concertation agreements, pursuing conflictual strategies instead.

Identifying these possible interest-based reasons for action, however, fails to explain the processes by which unions formulate their *specific* interests in concrete situations. How do unions define whether participation in or contestation of social concertation is in the organization's and their members' best interest when multiple courses of action are available? This question is particularly relevant where the definition of what constitutes "interests" and the best available course of action to maximize them is not straightforward. Crisis situations, as Blyth (2002) emphasizes, are prime examples of such contingent and indeterminate social realities, as they can make it difficult for labor to pursue their first-order preferences, thus confronting unions with difficult choices and no obvious "best options." For example, unions might be faced with the dilemma of choosing between prioritizing their long-term institutional interests in the form of organizational survival or preserving their institutional power resources through participation in concessionary bargaining, on the one hand, or pursuing the immediate material priorities and demands of their members, on the other hand. In addition, the gains to be made from oppositional strategies may not be clear cut. Our enquiry thus starts from the observation of the ambiguity that unions face in the identification of interests, especially in crisis situations which make trade-offs sharper and "first best" options harder to pursue. Consequently, we ask the following: In contexts where governments are willing to engage in social concertation, why do unions facing similar material circumstances and difficult trade-offs opt for different courses of action?

Incorporating ideology and ideas in our understanding of unions' strategies

It is here that unions' ideology and ideas come in to complement interest-based and materialist accounts of unions' strategic choices in crisis conditions. A central problem with the theoretical account of concertation outlined above is that it assumes that unions act solely as rational economic agents, that interests are determinate and can be deduced directly from material reality, from institutional positioning, or *post hoc* from the concrete courses of action taken. Following Hauptmeier and Heery (2014: 2474), instead, we hold that it is important to recognize *"that values, beliefs and ideologies are as important in directing behaviour as is rational calculation for instrumental advantage"*. Indeed, as Rodrik (2014: 191) points out, actors' supposedly "rational" behavior for the advance of "self-interest" presumes a conception of the self and of its purpose, which in turn shapes actors' conceptions of *what* exactly is the "interest" to be maximized.

Generally, within the industrial relations literature, there has been a relatively static approach to the understanding of interests, based on the labor–capital divide: Better pay, job security, and equal treatment are seen as central to the interests of workers, while increased profits, workplace flexibility is associated with the interests of employers. In contrast, much of the literature associated with ideational approaches from other disciplines, such as political science or organization studies, sees interests as being an outcome of agential, discursive, and organizational processes with no necessarily fixed end to them (Whittle & Mueller, 2012). Following Hodder and Edwards (2015), we see union interests as having *material underpinnings* insofar as unions' basic purpose as representative organizations of workers are rooted in the location of workers in the class system and in the unequal power relations at the basis of employment relationships. Yet, notwithstanding this common material underpinning, we argue, in line with insights advanced both by Edwards (1986) and Hyman (2001) and by more recent strands of ideationally informed scholarship in industrial relations (cf. Hauptmeier & Heery, 2014; McLaughlin & Wright, 2018) that the definition of union interests in specific settings is a more contingent and agential process, as unions frequently define the concrete content of their representative function in very different ways in a process that is heavily shaped by discursive practices and ideational conflicts.

Our perspective, although rooted in a different ontology which recognizes a material basis to interests, presents some overlaps with "constructivist" (Hay, 2016) or "discursive" institutionalist approaches (Schmidt, 2008), insofar as it conceives of political realities as being "*at least partially constituted by actors through the subjective and inter-subjective understandings they develop to make sense of their experiences and to orient themselves towards their environment (…)*." (Hay, 2016: 525). From this derives the notion, shared broadly among other proponents of ideational approach in industrial relations and political economy, that "*the ideas actors hold are integral to understanding (and hence explaining) their behaviour*." (ibid.). Actors' interests, accordingly, are conceived of as being at least partially socially constructed, rather than fully materially given, and their engagement with the institutional and political environment as *mediated ideationally* (Hay, 2016: 526).

In line with these insights, we argue that the definition of what constitutes the advancement of "membership" or "organizational" interests for unions, and how these are best pursued in different circumstances, is not *directly* deducible from their structural–material characteristics or from the institutional setting in which they are located. Rather, it is an agential process that has *material underpinnings* (Hodder & Edwards, 2015) but is also *ideationally mediated* (Hay, 2016: 526), involving articulation, framing, and re-definition, often taking place through intense intra-class power and discursive struggles (Hyman, 1999; Offe & Wiesenthal, 1980; Traxler, 2007).

We argue that unions' ideological formations play a key role in this process of ideational mediation that underpins the definition of unions' interests and strategies. We follow Gerring

(1997: 980) in proposing a "minimal" definition of ideology as referring to a complex of shared ideas, causal beliefs, and norms bound together in a "non-random fashion" and characterized by a certain degree of internal coherence and consistency over time. Accordingly, ideology differs conceptually from more concrete or context-specific *ideas* as it "*groups together a large number of idea-units in a single, reasonably coherent, package*" (Gerring, 1997: 961) and has a greater degree of inter-temporal persistence than more contingent, context-specific ideas. Our conception of ideology is therefore attentive to the historical, deep-seated roots of unions' ideological formations, which have objective material bases but are also context dependent, shaped by prior historical experiences and thus open to potential re-definition and interpretation (Preminger, 2020). We argue that unions' ideological formations play an important role in the process of union's strategy formation, as they act as scripts that union elites rely on and mobilize to interpret situations, especially when these are ambiguous, and to orient themselves toward their institutional–political environment. Ideological formations, in turn, can also be mobilized—more or less strategically—by union elites to defend and legitimize their chosen programs of action as appropriate to their constituencies (cf. Campbell, 2004: 94), in a way that reproduces these courses of action—through the exercise of what Carstensen and Schmidt (2016: 323) describe as power *through* ideas.

Long-standing ideological formations are however not frozen. Rather, we hold that they can themselves be subject to conflict and re-interpretation over time, and be over-layered with short-term ideas, beliefs, and interpretative paradigms arising from and contingent to the specific context at hand. This is particularly likely to be the case in situations of crisis—which often manifest themselves as moments characterized by radical uncertainty, where actors "*are unsure as to what their interests actually are, let alone how to realize them*" (Blyth, 2002: 9–10). In such contexts, as Blyth (2002) argues, ideas become especially relevant as they help actors make sense of what a crisis *is* and diagnose its causes, the possible solutions to it, and the appropriate course of collective action to follow. In such "critical junctures," actors might embrace new ideas that overlap with or adapt deep-seated ideologies, so as to find appropriate solutions to new contextual challenges (McLaughlin & Wright, 2018; Rodrik, 2014). Hence, crises situations can become arenas for "battles of ideas" (McLaughlin & Wright, 2018: 572) among actors and within organizations, where competing paradigms and diagnoses are counterposed.

In short, we contend that in situations of crisis, long-standing ideological formations can interact with more contingent ideas about the nature of the crisis, its causes and the appropriate solutions to it in shaping unions' strategies. Thus, our account of the relationship between ideology, ideas, and interests does not imply rejecting altogether a materialist, interest-based understanding of union action, but highlights that the interests of the union and its members at a given point in time are ideationally mediated.

Conceptualizing unions' ideologies of social concertation

Union ideologies are plural (Hyman, 2001) and characterized by the co-existence of multiple, competing notions of trade unionism (Hodder & Edwards, 2015). Extant scholarship has already shown how unions' ideology is an important factor shaping, for example, their organizing strategies (Simms, 2012), their attitudes, and agendas toward temporary or precarious workers (Benassi & Vlandas, 2016) and their stances toward liberalization (McLaughlin & Wright, 2018). Here, we build on this literature to show how ideological formations play a role in shaping unions' definition of their interests vis-à-vis social concertation and their decision to participate—or not—in such processes.

The ideological pluralism of trade unionism is associated with conflicting definitions of the very nature of a union in its purpose and tactics (Hyman, 2001). In broad terms, we repurpose Hyman's (2001: 3) "eternal triangle" of union identity (Figure 1) which distinguishes three

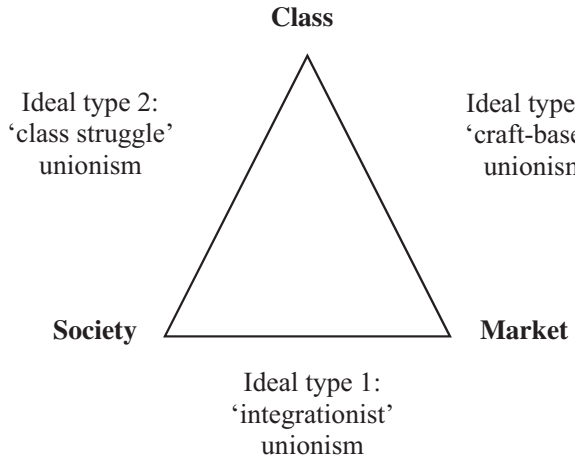


FIGURE 1 Hyman's "eternal triangle" of union identity. *Source:* Hyman, 2001

"ideal types" of unionism, each associated with a distinctive ideological orientation regarding the role of unions in society and the economy. While scholars such as Hyman (2001) and Kelly (1998) discuss union identity, they do not explicitly define it. However, Gumbrell-McCormick (2013: 242) outlines it as "*the relatively stable characteristics and orientations of an organization, tending to persist …, which have both an internal dimension (assuring members, activists and officials what the union is and does) and an external one (proclaiming the nature of the union in the broader industrial relations and public sphere)*". In this way, she sees identity as the deep-seated characteristics that inform internal and external constituencies about the union's approach. Ideology is, accordingly, one of these deep-seated characteristics.

In Hyman's first ideal type, unions are oriented toward *society* and are conceived as vehicles of social integration, dedicated to raising workers' status in society more generally and advancing social justice in a broader sense. In the second, unions are oriented toward *class* and are conceived as vehicles of class struggle and anti-capitalist opposition. In the third, unions are primarily oriented toward the *market* and thus are conceived as interest organizations with labor market functions that are pursued primarily through collective bargaining to improve the economic standing of members. Hyman argues that all trade unions face in the three directions simultaneously and that union identities and corresponding ideological formations are usually located *within* the triangle, in-between the three ideal types.

We build on this to put forward the concept of "*ideologies of social concertation*." By this, we denote the well-established sets of ideas, consolidated over time, that unions hold about their role in the economy, in society and vis-à-vis the state, and about the desirability of compromises among social classes in the name of the broader "national," "societal" interest. According to the "minimal" definition of ideology (cf. Gerring, 1997), we do not conceive of unions' ideologies of social concertation as coterminous with *political* ideologies in the classical sense— communism, socialism, liberalism, and the like—although these sometimes overlap, but rather as denoting coherent, long-standing sets of ideas about unions' roles in society and in the economy. We argue that these ideologies of social concertation differ across unions in ways that are not fully explained by their structural–material characteristics and institutional positionings and that these ideological constructs mediate how unions conceive and formulate their interests as they pertain to their engagement with social concertation.

The first ideal type of "integrationist unionism," located between the "society" and "market" ends of the triangle, is the one most closely associated with the concept of social partnership, which can be conceptualized as *"a normative commitment to economic solutions which*

contribute to relatively peaceful labour relations" (Behrens & Helfen, 2016: 337). This tradition evolved first as an expression of Christian trade unionism in the 19th century, then as a non-communist version of socialist class organization, but has since evolved more broadly, as a "pluralist–unitarist" frame of reference on industrial relations that extends beyond these political traditions. Belying this ideological orientation is the implication that common or at least reconcilable interests exist between labor and capital (Hyman, 2001, p. 49), with expression of a "functional reciprocity of capital and labor" and of the need for an "orderly and harmonious regulation of their interdependence." From this follows the idea that unions fulfill a socioeconomic function of stabilization, maintaining harmony and preserving unity, striving for workers' dignity without, however, threatening the bases for capital accumulation. As highlighted also by Katzenstein (1985: 34 and ff.), these integrationist ideologies of social partnership were forged, for example, as in Austria, following the traumatic divisions and conflicts arising from the interwar period.

The second ideology of social concertation that we identify is instead more oppositional and associated with unions belonging to the camp of "class struggle" (i.e., located between class and society). Unions falling within this side of the triangle have historically held a rather opposite view of social concertation—which is not surprising, considering that the very notion of concertation evolved, originally, in an anti-communist logic to overcome and deny the necessity of class struggle. From this derives a skepticism toward social concertation in its integrationist version—that is, as a process geared toward overcoming conflicts for the sake of social stability and unity. Participation in social partnership is accordingly perceived as a threat to the role of unions "*as autonomous working class institutions*" (Panitch, 1981: 27) and as a vehicle for their potential integration into the organs of the state and thus a potential obstacle to the achievement of social justice in a broad sense. Social concertation is acceptable, in this ideological orientation, only in light of the possibility of reaching "positive" class compromises (cf. Wright, 2000) through these channels with direct, material benefits for the working class; or for the purpose of upholding class-wide solidarity by not undermining the position of other workers through exit.

The third ideology of social concertation that we identify is associated with the third ideal type of unionism—between "market and class"—and is characterized by a more ambiguous and instrumental attitude toward social concertation. Indeed, according to a vision of unionism as an activity of sectional defense of the membership's material interests *in the market* through free collective bargaining, social concertation primarily emerges as an *interference* in the market-based interactions between capital and labor. Indeed, social partnership in its integrationist version also presupposes a willingness to accept wage restraint or make other concessions to the other side, potentially settling for less than what might be achieved in market terms alone, in the name of unity and social peace and for the sake of upholding the terms of an agreement which concerns "society" or the nation at large, rather than a narrow section of union membership. This, in turn, contrasts with a market-based model of unionism which prioritizes the pursuit of sectional membership interests as the primary goal and leaves limited space for broader, more expansive solidarities. In the empirical section of the article, we will show how these distinct ideologies of social concertation play a role in shaping unions' understanding of what is in the organization's and the members' "best interest" when faced with tough choices of participation in or rejection of crisis concertation agreements.

Although attentive to the inter-temporal durability of unions' ideologies of social concertation, we do not treat such ideologies as static and frozen in time. Rather, in our analysis, we also consider how these long-standing ideologies interact with more contingent and specific ideas and interpretations that union actors might hold both about the nature of the crisis at hand, its diagnosis and possible solutions; about the features of the political opportunity structure they are faced with during the crisis moment; and about the appropriate courses of action to face it. These contingent ideas, we argue, can be influenced by the discursive and

political environments within which union actors are embedded and operate in a specific historical moment, and might lead to a temporary re-adaptation or re-definition of strategies and interests in ways that might partly *deviate* from what might be expected when considering only their long-standing ideological positions. For example, union actors might be influenced by economic ideas dominant in the national public discourse about the causes of a crisis, which exercise ideational power by "structuring thought or institutionalizing certain ideas at the expense of other ideas"—what Carstensen and Schmidt (2016 p. 323) describe as "power *in* ideas." Being subject to this form of ideational power might lead union leaders to align themselves more readily with government choices—for example, with regard to accepting the necessity of austerity or the inevitability of specific "sacrifices" to fix the economy—and thus increase their willingness to sign up to crisis concertation agreements than what might have otherwise been the case.

In the empirical analysis, we now consider how the interaction between long-standing ideological formations and these contingent crisis-related ideas held by unions' leaders play out in shaping their strategic choices.

CASE SELECTION AND METHODOLOGY

Disentangling the causal role of interests, ideologies, and ideas at an empirical level is not a straightforward task, as the two, as argued above, are interlinked. To attempt that, we focus on cases of unions' engagement in social concertation at times of intense crisis during the Great Recession of 2008–2014, in two countries hit severely by the Eurozone crisis and both recipients of financial assistance from the Troika of the European Commission, IMF and European Central Bank: Portugal and Ireland. In both countries, at the height of the crisis policymakers recurred to social concertation agreements as a strategy of structural adjustment to face the challenges of fiscal consolidation and excessive markets pressure on sovereign bonds (Tassinari, 2021).

In Portugal, two tripartite agreements were concluded to facilitate the implementation of far-reaching labor market reforms in 2011 and 2012. In Ireland, bipartite agreements between unions and two successive governments were concluded in 2010, 2013, and 2015 to implement structural adjustment in public sector wage-setting and labor relations. Both cases are arguably instances of extreme macro-concessionary bargaining, as these agreements entailed significant short-term material losses on part of labor movements, with limited immediate concessions extracted in return.

These cases provide a hard test for interest-based accounts of social concertation. Such crisis concertation agreements confronted unions with dilemmas and ambiguity, as the balance between the potential gains and losses of different courses of action was hard to adjudicate. While either option—engagement or confrontation—might advance some kind of "interests," it is not straightforward in terms of pure rational calculation what option would lead to greater "material" gains, or which sets of interest should be prioritized. It is precisely in these ambiguous situations that we can best observe how ideological constructs play a crucial role in mediating actors' understandings of and engagement with the political reality in which they operate.

We chose a "most similar" (Seawright & Gerring, 2008) comparative research design to be able to better isolate the role of ideologies of social concertation in each country: We compare unions embedded in similar national macro-institutional contexts, which are similar to each other with regard to their structural characteristics and membership composition, but that differ with regard to their strategic choice of engagement in or rejection of crisis concertation. While such selection does provide the strongest basis of comparison, we do so in a contextualized approach as understanding the national trajectories of labor politics will always be

subject to national institutional context (Thelen & Locke, 1995). In Portugal, we compare two peak-level union confederations—the social-democratic union UGT, who signed up to both tripartite pacts, and communist CGTP, who refused to participate; in Ireland, we compare three occupational unions based on the teaching profession—INTO, which accepted the public sector wage agreements in 2010, 2013, and 2015; TUI, who shifted between opposition and eventual acceptance; and ASTI, who consistently adopted a position of rejection. The structural similarities that these unions share allow us to show how differences in ideological orientations lead "structurally similar" unions to choose different courses of action even though their material interests should be, from a "rational" standpoint, similar thus showing the role of unions' ideologies of social concertation at play.

Comparing two different kinds of unions—peak-level unions in Portugal and occupational unions in Ireland— also lends strength to our argument as it allows us to show how ideological formations operate not only at the level of peak-level confederation in countries characterized by union pluralism such as Portugal, where differences in political ideology are already well-established in the literature (cf. Watson, 2015), but also at different levels of unionism, including for occupational unions which are rarely analyzed in ideological terms. Our case studies draw on a database of 45 qualitative interviews carried out over 2017–2021 with policymakers and peak-level employment relations actors in the two countries, which we complement with documentary analysis of policy documents, unions' documents, bulletins and publications, newspaper articles, and public speeches by union leaders.[1]

FINDINGS

Portugal: Concessionary concertation during the Great Recession

Prior to the onset of the Great Recession, Portugal had a history of recent, fairly successful social concertation. Between 1986 and 2008, twenty tripartite agreements were concluded by successive cabinets with the four employers' confederations and the moderate social-democratic union, UGT. These facilitated the implementation of several liberalizing reforms both in welfare and labor market policy (Campos Lima & Naumann, 2011). Despite Portugal's extensive economic problems in the run up to the Great Recession, Portuguese policymakers continued to appreciate the capacity of social concertation to secure political and social stability and attempted to use it as a strategy of crisis management on repeated occasions (Tassinari, 2021).

First, the center-left Socialist Party (PS) government (2008–2011) of PM Socrates relied on social concertation as an attempt to *avoid* a bailout when the Portuguese sovereign debt crisis reached its peak in early 2011. In March 2011, it decided to broker a headline tripartite agreement, appealing to a sense of "responsibility" of the employers' organizations and of the main moderate union confederation UGT. The agreement expressed the signatories' commitment to implement far-reaching liberalizing structural reforms of labor markets and industrial relations to increase economic competitiveness—then implemented during the years of the bailout (Bulfone & Tassinari, 2021).

[1]The interviews were conducted primarily by the first author as part of her doctoral research between 2017 and 2018 (cf. Tassinari, 2019). Four additional follow-up interviews were conducted jointly by the three authors in 2021. In our empirical analysis, we quote directly only the interviews conducted with officials of the interested unions, using all other interviews as background sources. In the interviews, respondents were asked to elaborate on the rationale for their organization's choices vis-à-vis crisis concessionary agreements, and on how they adjudicated between the costs and benefits of different options. Specific questions were asked about the role of ideas, ideological orientations, and beliefs in shaping the organizations' choices, alongside questions on short-term strategic calculations and matters of internal union politics and relationships with other actors. The interviews were coded thematically with triangulation between the authors.

After the Memorandum of Understanding (MoU) with the Troika was concluded in May 2011, a new center-right government came to power. Despite enjoying a comfortable parliamentary majority, the new government still chose to recur, in the early phase of the bailout, to social concertation as an adjustment strategy. In January 2012, a new tripartite deal, the *Compromisso para o Crescimento, Competitividade e o Emprego* (Compromise for Growth, Competitiveness, and Employment), was signed with the UGT union and the four employers' confederations. This was meant to act as blueprint for the major labor market measures foreseen by the MoU, including the liberalization of dismissal protection, alterations to compensation of overtime work, and flexibilization of the framework of collective bargaining. For government executives, conjugating politically costly liberalization with social peace by securing the consent of a major union confederation to harsh reforms was seen as important to gain external credibility vis-à-vis creditors, signaling domestic responsibility, and "ownership" of the adjustment program.

However, the two agreements constituted clear instances of concession bargaining. The social partners were not given the chance to input meaningfully on the content of the measures prior to signing[2], and the agreements did not include any substantive trade-off between the parties, as the far-reaching liberalization was not compensated with any substantive policy concessions to organized labor, besides a vague commitment to active labor market program's expansion (Cardoso & Branco, 2018). Both options of subscribing or rejecting the agreement entailed costs: on the one hand, losing legitimacy and being viewed as collaborators in the implementation of austerity; on the other hand, losing access to channels of influence in policymaking.

Cleavages in Portuguese unionism: The case of UGT and CGTP

The union front was divided over the issue of participation in these social concertation deals by a long-standing ideological cleavage between the communist confederation CGTP and the social-democratic UGT. The largest confederation, CGTP (*Confederação Geral dos Trabalhadores Portugueses*, General Confederation of Portuguese Workers), has been closely associated with the Portuguese Communist Party (PCP) from the onset. Consequently, even after democratization in 1974, it embraced a radical, "class and mass" model of unionism, centered mostly around workers' mobilization, rather than around representative action at workplace level (Stoleroff, 2014). CGTP had historically been opposed to participating in most social concertation agreements. Despite being included formally in the tripartite Standing Committee for Social Concertation (CPCS), between 1986–2008, CGTP refused to sign all but six of the twenty tripartite agreements concluded (Campos Lima & Naumann, 2011). The same was the case during the Great Recession. CGTP did participate in the CPCS meetings, which it mainly used as an arena to gain political visibility and to denounce publicly the governments' policy agenda.[3] It did not agree to either the 2011 Tripartite Agreement or to the 2012 one, arguing that the proposed reforms, especially those included in the 2012 Agreement, amounted to nothing more than "*blackmail"* and "*social terrorism"*[4] on the part of the government.

The much smaller moderate confederation, UGT *(União Geral dos Trabalhadores*, General Workers' Union), differed in approach. UGT was formed as a split from CGTP in 1978, with links to the Socialist Party (PS) and the center-right Social-Democratic Party (PSD), with the aim of "democratizing" the union movement against Communist hegemony (Stoleroff, 2000:

[2]UGT Deputy General Secretary, interview with author, October 2017.

[3]Former CGTP General Secretary, interview with author, November 2017.

[4]CGTP General Secretary, interview with author, November 2017.

459). Linked to white collar occupations and the public sector, UGT adopted from the onset a more pragmatic, compromising strategy to gain recognition from the state as a reliable partner and has maintained links with both PS and PSD. Over time, this strategic orientation consolidated within the union an ideology of social concertation according to which participation in social compromises came to be seen as a value *in itself*. Consequently, UGT participated in all tripartite agreements concluded since democratization and remained strongly invested in the continuation of social concertation throughout different phases of Portuguese political history.

The same happened during the recent crisis. While UGT also acknowledged that the main value of the agreements was symbolic rather than substantive, and that the concrete gains were very limited, in both 2011 and 2012 UGT decided nonetheless to lend its consent to the deals, after having extracted some minor concessions—such as the removal of a proposal by the center-right government in 2012 of increasing working time by half an hour without extra remuneration. CGTP remained instead consistently opposed, arguing that such agreements would damage fundamentally the interests of Portuguese workers (Eurofound, 2011).

The role of ideological formations and ideas in accounting for differences in unions' positions

Ideological formations played an important role in shaping the different strategic orientations of the two confederations toward these concessionary agreements. On the one hand, UGT's orientation is illustrative of what we call an "integrationist," positive view of social partnership, associated with the first ideal type of unionism. UGT's leadership repeatedly justified their participation in social concertation through a logic of "damage limitation," arguing that accepting sacrifices was necessary in the name of safeguarding concertation and upholding a unitary national interest, consistent with its anti-communist roots.

This vision of the necessity of integrationist unionism was shared by the two political forces involved in UGT's foundation (the center-left socialist party PS and the center-right moderate party PSD). It found its roots in the upheavals of Portugal's revolutionary transition to democracy in 1974, which created among Portuguese political elites of both the center-left and the center-right a strong awareness of the need to support "modernization" and the country's economic development into an advanced capitalist economy by calming social conflict through consensual policymaking spanning different sides of the political spectrum. This orientation echoes Katzenstein's notion of "social partnership ideology" emerging out of experiences of conflict. This notion of unionism not only had cognitive-ideational roots, but was also tied to the pursuit of a specific political project: neutralizing the legacies of the 1974 Carnation Revolution and facilitating the process of integration of Portugal into the European Union and into the family of advanced capitalist economies.

During the crisis, this ideological orientation clearly influenced UGT's strong stance in favor of participating in crisis concertation deals. On the one hand, UGT's leadership saw the agreements in a pragmatic sense as a way to defend its membership from possibly worse outcomes. According to a former UGT General Secretary, given that the Memorandum included "*extremely dangerous*" provisions in terms of labor law, "*for UGT, this was a defensive agreement: to avoid worse damage and to allow a climate to negotiate in the future changes to labor law*".[5] UGT officials argued that subscribing to the agreement in 2012 allowed them to keep channels open over the subsequent implementation of the MoU and continue negotiating with the government over the content of reform measures for the following two years as an attempt

[5]UGT former General Secretary, interview with author, November 2017.

to "*avoid the worst"* and "*try and save what was possible*." In the words of a senior UGT official: "*The Troika came with a cavalcade of measures, and the agreements stopped this cavalcade because it was very strong*."[6]

On the other hand, this "pragmatism" was ideationally mediated and underpinned by an underlying adhesion to the notion of social peace as ultimately being in the "national interest," functional to preserve accumulation and facilitate the recovery. It is important to highlight that this interpretation on the part of UGT's leadership of the value of concertation in the crisis conjuncture, although ultimately aligned with UGT's long-standing "integrationist" ideological orientation, was not a given, deterministically shaped by pre-existing ideological orientation. Rather, it was itself the object of ideational conflicts and debates which played out *within* the union and between UGT and the broader labor and anti-austerity movement over 2010–2012.

In interviews, representatives of UGT's leadership reported that the internal dialectic within the union about the strategic stance to take vis-à-vis the government's austerity agenda was intense.[7] Some of UGT's affiliate unions in the public sector, directly affected by austerity cuts, favored a more confrontational stance toward the government. In late 2010, this internal dialectic led the peak executive of UGT, for the first time since 1988, to decide to join the anti-austerity general strike called by CGTP on November 24, 2010. This testifies to the influence of the broader contingent ideational context in shaping unions' strategies. As anti-austerity ideas vis-à-vis the visible failures of the government's crisis management were gaining traction in Portuguese society from late 2010 (Accornero & Pinto, 2015), these reverberated within UGT's internal dialectic leading the leadership toward a temporary deviation from their usual strategy. However, participation in the general strike was itself motivated through a logic of social peace and recuperation of social dialogue, in line with UGT's deep-seated ideology:

"*What happened… when we went to the general strike… we were never trying to overthrow a government, we are trying to fight for a change of policy. And when we manage to have a restart of the social dialogue in order to shape policy, that's a good result for us from a strike*."[8]

After this temporary shift in strategy, partly motivated by the ongoing "battle of ideas" in Portuguese society over the interpretation of the crisis, its causes and possible solutions, UGT's ideologically grounded preference for social dialogue over confrontation eventually won out. Indeed, from early 2011, UGT's leadership came to embrace the government and employers' assessment about the importance of maintaining social peace in the country, to avoid a "*Greek-style situation*" and thus contribute to an orderly exit from the crisis: "*the social peace was something extremely important and only a tripartite agreement could achieve that, even if we had to swallow some measures… […] we shared the view that the bigger value at the time was having social peace."*[9]

In this regard, in the face of a worsening crisis situation, accepting huge material concessions to employers and the Troika for the sake of preserving social unity and aiding the recuperation of capitalist accumulation was ultimately interpreted by UGT's leadership as being in line with the pursuit of the union's interest—conceptualized as referring not only to the material fate of its immediate membership, first and foremost its members in the public sector, but to Portuguese society *as a whole*, in inter-class terms.

In contrast, the opposition leveraged by the largest union confederation, CGTP, against the conclusion of social concertation agreements during Portugal's sovereign

[6]UGT Deputy General Secretary, interview with author, October 2017.

[7]UGT Deputy General Secretary, interview with author, October 2017.

[8]UGT Deputy General Secretary, interview with author, October 2017.

[9]UGT Confederal Secretary for trade union action, interview with author, October 2017.

debt crisis was predicated on different ideological grounds. Despite always participating in the CPCS proceedings to maintain political visibility, CGTP had consistently been skeptical toward signing up to social concertation agreements throughout the twenty years preceding the onset of the 2008 crisis. This stance was rooted in a rejection of perceived class collaboration in the name of upholding the interests of the Portuguese "people," conceived as being coincident with the working class and in privileging class struggle as the main method of advancement of members' interests. As stated by the General Secretary of CGTP:

> "The systematic, persistent, intervention of the CGTP has contributed to give a critical view of the functioning of Social Concertation and to alert workers and public opinion that the major problems of the country are not solved in Social Concertation, but are solved through an intervention of workers in workplaces to demand from employers a positive answer to their problems."[10]

In this regard, CGTP's ideology of social partnership also expressed a concern for the "national" interest. However, this was articulated in terms of upholding the sovereignty, autonomy, and interests of the Portuguese working classes, rather than as a concern for preserving national economic competitiveness within the capitalist world economy.

In line with its class struggle-oriented model of unionism, traceable to the second "ideal type" of unionism sketched above, CGTP consistently opposed both concertation agreements in 2011 and 2012, and launched several protests against the proposed reforms package they entailed, including three general strikes. CGTP's opposition was articulated through a discourse that encompassed both elements of class struggle ideology and of defense of national popular sovereignty. On the one hand, CGTP union leaders adopted a classical discourse of "class opposition" against the liberalizing pressures of Portuguese employers and of the Portuguese state, depicted as inherently damaging of the immediate material interests of the working class. At the same time, the justification of opposition had also nationalist undertones: For instance, CGTP General Secretary Armenio Carlos characterized the agreement of 2012 as "*blackmail"* against the people as it implied a submission of the popular will to the imposition of measures set by external authorities, that is, the Troika.[11]

This ideological stance, which aligned itself with the broader anti-austerity discourse that was gaining traction among segments of Portuguese society in 2010 (cf. Accornero & Pinto, 2015), provided the union with a set of discursive justifications to defend this stance even in the face of the limited concrete results to which such conflictual approach led in the crisis context. In the words of CGTP's general secretary,

> "It is clear that we were not able to prevent all the measures … but our resistance conditioned, delayed and put a brake on some measures that were planned for that four-year period. On the other hand, our resistance also contributed to erode the government's image from an electoral point of view…. (T)he participation and action of the workers is decisive, not only for the defense of their interests and rights, but also for the affirmation of democracy in a more global context, which is intended to be participatory, interventionist, critical, active, incisive."[12]

[10]CGTP General Secretary, interview with author, November 2017.

[11]CGTP General Secretary, interview with author (November 2017).

[12]CGTP General Secretary, interview with author (November 2017).

Ireland: Concessionary concertation during the Great Recession

From 1987 up until the onset of the Great Recession in 2009, Ireland was held up as an ideal-typical exemplar of EMU-focused social pacts. For the first 20 years, the Irish system of social partnership was associated closely with the Celtic Tiger growth period (Baccaro & Simoni, 2008; Roche, 2007; Teague & Donaghey, 2009). However, by the time in which the fallout from the Great Financial Crisis had settled, social partnership came to be associated in Irish public opinion with the excesses of the boom period and regarded as part of the problem rather than of the solution (Culpepper & Regan, 2014; Gago, 2021; Teague & Donaghey, 2015). In the early phase of the crisis, in 2010, the employers' association, IBEC, walked away from the last partnership wage agreement (*Towards 2016* agreed in 2008), making a concerted approach to crisis management in private sector industrial relations unviable.

Conversely, the Irish Congress of Trade Unions, Ireland's single peak union federation, repeatedly made significant overtures to government to develop a national consensus approach of economic crisis management, especially to deal with the response to the sovereign debt crisis in the public sector. Such an approach effectively became the only credible route for unions in early 2009 when an attempted mobilization toward a general public sector strike, mainly in response to a 7% pensions levy on public sector workers, failed to achieve a groundswell of backing across the public sector, particularly when IMPACT, Ireland's largest public sector union, failed twice to achieve the member support necessary to support strike action.

These processes led to the conclusion of two peak-level "crisis corporatist" bipartite deals: the Croke Park Agreement (CPA) in 2010 and the Haddington Road Agreement (HRA) in 2013. These deals were instances of "defensive" concession bargaining, which conformed to the necessities imposed by the markets of stabilizing Irish public finances (Hardiman & Regan, 2013). In short, unions agreed to guarantee industrial peace and implement a program of far-reaching public sector reform to enhance productivity and reduce headcount, in exchange for a promise of no further pay cuts and no compulsory redundancies. For government, key gains were made in terms of consolidating pay cuts, particularly with new entrants often being paid well below what existing staff were paid, recruitment freezes across the public sector and commitments by the unions to increase workplace flexibility.

The HRA emerged after the government failed to get unions to agree to a revision of the Croke Park Agreement (dubbed "Croke Park II") in 2013 which proposed draconian cuts across the board to deal with a shortfall of around €1 billion in public finances which had unexpectedly manifested two years into the bailout program. In terms of content, the 2013 HRA went further and deeper than CPA, as it included further pay cuts for higher earners, as well as across-the-board increases in working time and changes to allowances. Compulsory redundancies were avoided, but unions had to give up some of the limited gains extracted through CPA. Nonetheless, they obtained two concessions. First, the direct pay of those earning below €65,000 was protected in exchange for increases in working time, thus ensuring a partly progressive distribution of the pay cuts. Secondly, they were guaranteed the possibility of opening an early renegotiation of the agreement in case of early economic recovery. Maintaining open this channel of future voice not only ensured the continued relevance of public sector unions as bargaining partners but also proved very important in practical terms during the recovery.

In 2015, a further deal—the Lansdowne Road Agreement (LRA)—was concluded as economic conditions dramatically and unexpectedly improved to pave the way for the partial recuperation of pay cuts after the crisis. This was in line with the concession that unions had extracted in previous deals about the pay cuts being only "temporary." This led to the conclusion of a first pay restoration agreements in 2015 followed by a further restorative public sector wage deal in June 2017.

Signing up or not to these deals confronted unions with strategic dilemmas. On the one hand, accepting the deals granted unions with some certainties about the shape of

cuts and channels of voice to influence the trajectory of restructuring. At the same time, it presented them with the risk of being delegitimized vis-à-vis their membership as complicit with austerity. On the other hand, rejecting the deals also entailed significant risks as unions who did not sign up were threatened with having unilateral pay cuts imposed upon them, more adverse terms and conditions and possible exclusion from future pay restoration.

Cleavages in Irish unionism: The case of teachers' unions INTO, ASTI, and TUI

Important cleavages emerged within the union movement about whether to sign up to these deals. These divisions played out among individual unions *within* the Irish Congress of Trade Unions (ICTU). On the one hand, some unions consistently took a broadly supportive stance of crisis concertation agreements—among which were the largest, entirely public sector unions such as IMPACT (now Fórsa), SIPTU, and the Irish National Teachers' Organisation (INTO), while others took oppositional stances—mostly smaller, occupational unions such as the Irish Nurses and Midwives Organisation (INMO), the Association of Secondary Teachers of Ireland (ASTI), and the Teachers Union of Ireland (TUI), who were generally not directly involved in the negotiations but only through their affiliation to ICTU.

These cleavages did not map neatly along structural union characteristics, as they also emerged among structurally similar unions, such as the three teachers' unions, which, despite having similar material interests, nonetheless took different positions vis-à-vis crisis concertation deals. These differences in positions can be accounted for by taking into account the long-standing differences in the ideological standpoints of the three unions.

In Ireland, there are three main teaching unions at the primary and secondary level which, despite some overlaps, have generally had relatively distinct sectors in which they organize. The Irish National Teachers' Organisation (INTO) represents teachers in the primary sector in Ireland with approximately 43,000 members. Schools are generally small (many with 3–4 teachers) with the vast bulk tied to church parishes, particularly Catholic but also Anglican. At the secondary level, Irish education was historically divided between "Secondary Schools," which were generally more academic in focus, "voluntary" in nature, that is, often owned and managed by religious organizations but mainly funded by the state, and technical schools, more vocationally oriented, government-owned, and run through arms of local government. This divide, however, has been dissolving gradually, particularly with the merger of secondary and technical schools into comprehensive "community schools." In contrast to primary schools, at the secondary level, schools are generally much larger and less embedded in the local community. In terms of union organization in the secondary level, the Association of Secondary Teachers of Ireland (ASTI), with approximately 17,000 members, was historically the main union in Secondary Schools, while the Teachers Union of Ireland (TUI), approximately 20,000 members, mostly organized in the technical sector. With the growing community school sector, however, the divide in union constituency has become more permeable and has increased competition between unions.

The members of TUI and ASTI, while generally working for different types of school, were employed on the same terms and conditions through the Department for Education. Primary school teachers are also employed on department terms and conditions, though pay is significantly lower (but with more opportunities for progression to being a School Principal due to the small nature of schools) and the teaching year is longer. One notable feature of the intersection of industrial relations and education policy is that teachers in Ireland, through the teachers' unions, have played central roles in terms of professional governance and the education curriculum. Thus, while being unions, all three unions also play important roles in the classic professional association role in a corporatist manner.

The three unions have historically differed considerably in their approach to social partnership and to industrial relations. In terms of their approach to social partnership between 1987 and 2009, the INTO has generally been regarded as one of the main supporters of tripartism and a mainstay of the position of the ICTU. In stark contrast, the ASTI has been regarded as probably the union most opposed to tripartism, consistently voting against social partnership during its lifetime to the extent that it disaffiliated from the ICTU from 2000 to 2003 due to its refusal to follow principles of democratic centralism within ICTU. Finally, the TUI, while often voting against tripartite agreements, has generally adopted the position of supporting the majority decision of the ICTU in the name of cross-public sector solidarity. The differing positions of the teaching unions were illustrated in the 2003–2004 "Public Sector Pay Benchmarking" exercise, which was a process designed under social partnership to evaluate public sector pay relativities against private sector workers. This review was established as it was argued that public sector pay, which was closely tied to national social partnership, had not kept abreast with private sector pay where much wage drift above the nationally agreed rates was being witnessed at the height of the Celtic Tiger era. The INTO were highly enthusiastic about the exercise, with General Secretary Joe O'Toole infamously saying it was an "ATM for teachers" to get higher pay. The TUI opposed the process in principle but engaged with it and did not take industrial action over the issue. By contrast, the ASTI took a highly oppositional approach to the very principle of benchmarking, withdrew from the Irish Congress of Trade Unions, and took strike action in opposition despite the report offering teachers an approximate pay rise of 12% in one go in addition to the national agreements. These positions were seen as highly emblematic of the approach of the three unions overall.

These long-standing divisions played out in similar ways during the Great Recession. In their approaches to the three public sector deals in the crisis, the three unions adopted patterns which were broadly consistent with their previous approaches. In the Croke Park agreement, the INTO voted 65:35 in favor, ASTI voted 62:38 against, and the TUI voted 75:25 against. The ASTI, consistent with their earlier position, and TUI, breaking with previous positions, both explicitly stated that they would not be bound by the majority rule of the Public Services Committee of the ICTU. Interestingly, all three unions, including the INTO, rejected Croke Park II with, for the first time, the INTO executive not recommending acceptance of the agreement, but balloting without a recommendation and members rejecting. For the Haddington Road Agreement, special provisions were included for the teaching profession, including restoration of profession specific allowances by 2018 and changes to increments for newly qualified teachers, and the INTO and now the TUI voted to accept (54:46) with the ASTI rejecting by 65:35 and voting in favor of industrial action. Over the remainder of 2013, the ASTI repeatedly took industrial action, but all was relatively demonstrative in nature rather than being all out strikes. When the union re-balloted at the end of the year with the intention of escalating the level of industrial action, members voted against the leadership's recommendation and in favor of the agreement by 57:43. For the 2015 Lansdowne Road agreement, again both the INTO and TUI voted to accept, while ASTI voted to reject with much of the rhetoric around rejection being based on the need to bring about equalization of teacher salaries for those recruited before and during the crisis.

In sum, the INTO supported all three main deals, though rejected CPII; the TUI rejected the Croke Park Agreement and CPII but accepted the two subsequent deals; and ASTI rejected all agreements, though eventually members voted against the leadership to accept the LRA. Thus, despite facing essentially the same material conditions, why did the unions differ in their approaches?

The role of ideological formations and ideas in accounting for differences in unions' positions

Long-standing ideological formations and contingent ideas, alongside structural features, played an important role in shaping the different strategic orientations of the three teachers' unions toward the public sector pay deals (see Geary, 2016 for a more general discussion of Irish unions). The position of INTO, broadly supportive of the pay deals in line with the Public Sector Committee of ICTU and the other main public sector trade unions, resembles in important respects that of the Portuguese UGT, as it entailed a commitment to social concertation in terms of pragmatism and upholding social peace and the national interest. This association between social partnership and the national interest consolidated through the 1990s and early 2000s, when social partnership was held up as a key factor facilitating economic growth (Donaghey & Teague, 2007). While O'Donnell and Thomas (2002) argued that under the golden period of social partnership, ideology was "left outside the door," we hold that such a commitment to the national interest was in itself an ideological position, aligned to notions of "integrationist unionism" which can be linked back to the first ideal type of unionism identified above.

Such a commitment to the national interest emerged clearly during the crisis period. While in the media, social partnership and hence union participation in public policy was undermined (cf. Gago, 2021), many public sector unions, including INTO, still positioned themselves as having an important role to play in problem solving activities, in particular around preserving the country's economic credibility and external competitiveness by adopting *pragmatic* stances that, while requiring difficult concessions, would help to secure social peace and signal to creditors domestic commitment to structural reforms and fiscal consolidation. As an INTO official recalled,

> "(…) it was a very traumatic period of time, …you were waking up every morning to these so-called 'international assessments' of your credit rating which were going down and down …. there was a certain element of freefall in the country… […] So that [Croke Park] was a very contested agreement, … there was a lot of internal heated debate within unions about approaches and quite clearly, you might say that the Greek model of wanting to just reject absolutely everything did not work [..] So we took a very strategic decision within the INTO at the time around the executive – courageous I would say on the part of my colleagues around the executive table – that we needed to recommend this agreement. … […] we thought we could deliver more by being in the tent rather than being populist and causing industrial strife."[13]

INTO, like the other main public sector unions within ICTU, also internalized the integrationist idea of "social peace" as coinciding with the national interest, especially with regard to the external perception of the country.

The then General Secretary of INTO supported what was viewed as the necessity of industrial peace, which had "*a pragmatism that underpinned it,"* related to the awareness that *"the scale of the problem was absolutely enormous, and people's day-to-day concerns to meet their bills, to pay their mortgages, to pay their childcare, had to be dealt with*."[14] This standpoint echoed in many respects the set of contingent economic ideas about the nature of the crisis and the inevitability of austerity that were dominant in Ireland at the time, especially up to 2013 (cf. Mercille, 2014; O'Connor, 2016).

[13]INTO General Secretary, interview with author, February 2018.

[14]Former INTO General Secretary, interview with author, June 2021.

How did INTO come to conceptualize the interests of its members as being coincident with a generally conciliatory position upholding social peace? Due to its size, INTO—along with SIPTU and IMPACT—generally was viewed as one of the main political players in the ICTU Public Services group. An interviewee from INTO explained that this central role in the public services group instilled in the leadership of INTO a broader perspective than the other two teachers' union, where they were more cognizant of the effect of their decisions on the wider public sector. However, the position of INTO has been more than simply a reflection of their structural aspects. INTO has historically espoused a more conciliatory approach, with one interviewee arguing that the outlook of INTO was generally one of "*a culture that recognized that unions have to work more collectively with government*", with "*social partnership being embedded in the DNA of the union*."[15]

This ideologically positive approach to social partnership is tied to the union identity. The close connection of primary schools, where INTO members are located, to local communities meant the position of the union is generally one more aligned to wider society in Ireland than in other teaching unions, with an interviewee stating "*membership of INTO would reflect the centrist part of society and the membership would be closer to the make-up of the voting public at that time… and be supportive of the [centrist Fianna Fail] government initiatives*."[16] This relatively conservative approach of the INTO meant that its ideology was generally one of balancing the professional needs of its membership with what is believed to be in the broad interests of the public sector and Irish society in general.

However, the rejection of CPII demonstrated that the pragmatism had a limit and that, like in the case of Portugal's UGT, unions' orientations were themselves the object of ideational battles within the labor movement and in broader society. INTO interviewees described the difficult decision they took, first not to recommend accepting Croke Park II but to recommend Haddington Road. On the one hand, they shared the government's assessment that the country was in a perilous position while, on the other hand, the cuts were viewed as potentially creating too much damage to public services but particularly the teaching profession: Thus, they were being drawn between societal and market pressures. Ultimately, the special provisions focused on their professional interests pushed the INTO executive into recommending accepting Haddington Road. The choice to reject CPII, partly deviant from INTO's usual strategic orientation, was also seen by the union leaders as ultimately consistent, or at least compatible, with their long-standing ideological orientation. Indeed, an INTO interviewee explained that the threat of industrial action was one "*the more rarely used the better*" and that their rejection demonstrated just how unfathomable the CPII proposals were. In this way, their ideological proclivity to make agreements was felt to be a strength when finally they did reject a proposal, as opposed to the position of "*the populists who wanted to reject everything*," perceived as less credible.

In contrast, since 2000, the ASTI has been regarded as the *"problem child"* of the ICTU, taking a highly oppositional and individualistic approach compared with most other ICTU public sector unions. ASTI's critical approach toward social partnership can be traced back to the third ideological camp of "craft-based," market-oriented unionism that we identified above. The key feature of their industrial action both during the social partnership era and in the crisis era, though vastly differing in economic and institutional contexts, was that the campaigns were fought around the idea that their members deserved an increased share of economic gains and preserving their place in the pecking order of Irish public servants.

A characteristic feature which distinguished the unions was the extent to which they attached importance to the idea of being independent in their direction or adhering to the

[15]Former INTO General Secretary, interview with author, June 2021.

[16]INTO former General Secretary, interview with author, June 2021.

majority view of ICTU. An ASTI interviewee explained that "*ASTI has traditionally taken the view that they don't like being bound by decisions of other unions*."[17] This view of the need for ASTI autonomy was seen as having informed also its decision to withdraw from the ICTU in the early part of the century and reflected in the periodic motions brought to their Congress to leave the ICTU in its entirety. This was very much in contrast to the position of the INTO where, as an INTO interview explained, they "*took a wide view of the need for collaboration in the industrial relations context*."[18]

Interviewees attributed this stance as motivated by ASTI having a stronger sense of being "*a professional association as well as a union*"[19] and thus placing a lower premium on the need to be seen as part of the ICTU family. This professional association view was underlined by ASTI officials expressing a preference for sectoral bargaining for the teaching profession as their ideal negotiation structure. This was reinforced by an ASTI interviewee who argued "*they (members) don't like the notion that their T&C can be decided by workers in other professions—civil servants, local authorities workers, prison officers: ASTI feel they shouldn't have a say on changes that they find unacceptable*."[20]

In this way, while the actions of the union often were viewed as radical in Irish terms, the motivations behind the actions were broadly conservative, driven from a craft-union type mentality. As part of this approach, campaigns often focused on trying to leverage public sympathy for the cause of the specific segments of the membership represented by these unions, rather than an attempt to shape public opinion against austerity in a way that would concern Irish society or the Irish "working class" in its entirety.

Finally, TUI generally has been viewed as the most ideologically left-wing of the Irish teaching unions and has been often referred to in the media in a rather pejorative sense as "the Union of Students in Ireland for Adults." In contrast to INTO and ASTI, both of whose members are mainly based in state funded but church run schools, the TUI's members are generally based in government-owned schools. Being explicitly part of the public service, the TUI has both taken a wider view of caring about public services in Ireland in their entirety and been more explicit in its identity as a union, rather than a union-professional association hybrid. In the words of a TUI interviewee, this ideological orientation, which can be traced back to a "class" approach to unionism, played an important role in shaping its approach to social concertation during the crisis.

> So the TUI and the tendency in the TUI as well at the time that old tendency towards a more maybe radical left-wing view of the economic situation, emerged more strongly than had had at any time in the previous 20 years, or indeed, at any time since then.[21]

Interestingly, in the first phase of the crisis, this "old tendency" of left-wing orientation overlapped with and was reinforced by an anti-austerity interpretation of the causes of and solutions to the crisis at hand which was, at the time, a set of ideas that was present in Irish society—especially in certain union and left-wing environments—but overall very minoritarian (O'Connor, 2016). This set of ideas progressively lost traction as the "inevitability" of the bailout became by far the dominant discourse in Irish media and political discourse (Mercille, 2014).

[17]ASTI Deputy General Secretary, interview with author, May 2021.

[18]INTO former General Secretary, interview with author, June 2021.

[19]ASTI deputy General Secretary, interview with author, May 2021.

[20]ASTI deputy General Secretary, interview with author, May 2021.

[21]TUI former General Secretary, interview with author, May 2021.

After an initial rejection, the TUI ultimately accepted the terms of the Croke Park and Haddington Road agreements. Initial opposition was clearly rooted in a logic of opposition to austerity and defense of the working class interest through a defense of public services. Acceptance, in turn, was eventually framed in terms of how the position of their members compared with other workers, and motivated in the name of upholding class-wide solidarity:

> We had to swallow our ideological pride in order to save jobs. It became as crude and as blunt as that. And when it came to that, there was no question. I mean, the vote that eventually saw the CPA accepted by the TUI, a very belated vote, was nonetheless, overwhelming because the people were not prepared to have others (in the public sector) lose their jobs, so that they would retain their ideological purity.[22]

In this way, while ultimately accepting the agreements, the explanation was articulated in terms of setting aside sectional interests in favor of wider issues of solidarity with other public sector workers—a very different reasoning and ideological framing from both INTO's and ASTI's. The quote also demonstrates the ongoing battle of ideas within the union and the tension between managing class interests, associated with "ideological purity", and wider societal and solidaristic concerns about the impacts that not accepting the agreement could have on the jobs of others across the economy. In this way, the tension between the poles of "class" and "society" was clearly to the forefront of shaping the TUI's response.

DISCUSSION AND CONCLUSIONS

We have examined the role played by unions' ideological formations and contingent ideas in shaping unions' decisions to participate in or oppose processes of social concertation under crisis conditions. While internal and external structural conditions significantly shaped unions' approaches to participation, our argument is that both the Irish and Portuguese case demonstrate that ideological legacies were central in shaping unions' decisions as to whether or not to participate in social concertation agreements in hard times.

The central point which emerges from our analysis is that union ideologies play an important role in shaping how otherwise structurally similar unions facing the same material conditions formulate and conceptualize their interests. Drawing on Hyman's triangle of union identity, we have put forward the concept of "*ideologies of social concertation"* to map out differences in the long-standing ideas that unions hold about their role in the political sphere, vis-à-vis the national economy and about the necessity of compromises for maintaining social peace; and in the extent to which they see the interests of their constituency as coincident or divergent with those of "the nation," "the class," and "the economy" as a whole, respectively. We have then shown how these ideological formations interacted with more contingent ideas about the crisis at hand in ideationally mediating how unions conceptualized their interests and shaped their decisions to participate or not in instances of crisis corporatism during the Great Recession. In Figure 2, we show how the ideologies of social concertation held by the various unions we have analyzed map onto Hyman's triangle of unions' identity.

It is not surprising that unions which played the most active role in social partnership arrangements in both countries during the crisis could be typified as belonging to the "integrationist" ideal type of unionism (side 1 of the triangle). Unions falling in this camp—between society and market—tended to view social partnership as a positive practice *in itself*, besides

[22]TUI former General Secretary, interview with author, May 2021.

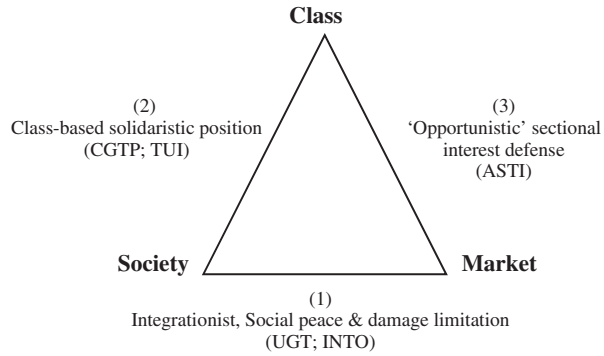


FIGURE 2 Hyman's "eternal triangle" and mapping of unions' ideologies of social concertation. *Source:* Authors' adaptation from Hyman, 2001

the immediate material gains that it can help extract, due to its embodiment of a practice of consensus and maintenance of societal harmony. In practice, this ideological orientation led unions such as Portugal's UGT and Ireland's INTO during the crisis to prioritize the pursuit of social peace and of cross-class national unity, over even the immediate material gains of union members, through a logic of damage limitation. This specific conceptualization of "national" interest, interpreted as an overcoming of the potential divisions between labor and capital for the sake of national economic success, enabled these unions to remain generally *consistent* in their participation in social concertation processes regardless of the difficult trade-offs they had to accept. This ideological framework also gave them tools to exercise ideational power through ideas (cf. Carstensen & Schmidt, 2016) to justify their participation and the material sacrifices that this requested to the membership in the name of social peace and of supporting the national recovery efforts.

To be sure, their participation was not completely unconditional on the attempted pursuit of their membership and organizational interests. For example, in both cases retaining open channels of "voice" in future decision-making was an important *quid pro quo* traded for consensus to social partnership agreements. However, the very ability to accept and sell to the membership such an "inter-temporal" bargain—accepting cuts in the present in exchange for the potential of influence in the future—requires an ideological acceptance of the "integrationist" principles of social partnership, that is, that the diverging interests between labor, capital, and the state can be reconciled in pursuit of a higher-order, shared good.

In both Portugal and Ireland, there were also unions who adopted a much more confrontational and oppositional approach toward social concertation agreements during the crisis—CGTP in Portugal, ASTI, and the TUI in Ireland. However, at a deeper level, ideological divergences led to significant differences in approach between these unions in terms of what they were seeking from their opposition and the tactics employed. These divergences testify that, far from being only shaped by the pursuit of "objective" interests, unions' understandings of their goals and purposes are mediated considerably by their ideological legacies which shape how organizational and membership interests are understood and that these legacies are themselves subject to contestation and re-definition through contingent "battle of ideas," related to the specific context at hand.

In Portugal, the camp of opposition to social partnership was centered around CGTP, a union with a communist tradition and a strong class struggle ideology, clearly located between the "class" and "society" ends of the triangle (side 2). CGTP put in place significant mobilizations both against austerity *and* against social concertation, which it conceptualized as a facilitator of liberalization against the interests of the Portuguese working class and, by extension, of the Portuguese people as a whole. This opposition, despite bringing limited results,

was presented as part of a wider class-based struggle, which also entailed an upholding of popular sovereignty and autonomy against outsiders' interferences. This is not surprising, as unions belonging to this ideological camp would be expected to display limited willingness to make material concessions or accept compromises for the sake of upholding and safeguarding capital accumulation or the national economic interest in itself. Justifications for the rejection of social partnership are thus articulated in the name of defending and upholding popular sovereignty and democratic control by the working classes over the state and its policies, in opposition to anti-democratic capitalist-state compromises facilitated by concessionary corporatist agreements. The positioning of the Irish TUI, although less radical than CGTP, can also be traced back to this ideological camp as its initial opposition to crisis agreements was rooted in principles of defense of public services and a rejection of austerity in the interests of the working class as a whole. Its eventual acceptance of pay deals was also justified in the name of preserving an encompassing cross-class solidarity, rather than taking a self-interested, sectional position.

At the same time, the different decisions taken by CGTP and TUI in some instances vis-à-vis the decision to accept or not crisis agreements also underscore our view that long-standing ideological formations do not *deterministically* shape union strategies but can themselves be subject to contingent re-interpretation and ideational contests. In this respect, the ideational *power in ideas* (Carstensen & Schmidt, 2016) exercised by the dominant ideational discourse in Irish society and media, consistently emphasizing the inevitability of austerity (Mercille, 2014) and the "selfish" orientation of public sector unions (Gago, 2021) played a role in shaping TUI's interpretation of the crisis situation toward privileging a "class solidarity" conciliatory stance over an oppositional strategy that could have been interpreted in public opinion as a defense of narrow interests. As a peak-level confederation battling against labor law reforms affecting the whole workforce, CGTP did not face the same risk of being depicted as "selfish" and could arguably afford more easily to stick to an oppositional stance.

Finally, as noted above, unions acting between market and class (side 3) had a less clear ideological stance with regard to social concertation. It is thus perhaps unsurprising that such unions adopted a rather opportunistic vision of social partnership under crisis conditions: supporting it only if functional to extract benefits for the specific segment of the membership they represent or to compensate for conditions of market weakness, but to otherwise reject it as a potential interference in the "market-based" functioning of collective bargaining if better gains could be achieved outside of its framework for the specific section of the membership at stake. This approach became most prominent for the Irish unions who took more oppositional stances to the conclusion of bipartite deals during the Great Recession—such as the Irish ASTI. As ASTI conceived of its identity as a craft-based professional union, its opposition to social partnership was framed in terms of preserving union and professional autonomy, juxtaposing the potential gains that their members could achieve vis-à-vis other groups of workers if operating outside of the framework of broader social partnership. What is interesting here was that, in congruence with the market-class orientation of these unions, much of the mobilization was based around defending insider–outsider divides, rather than around articulating ideas of working class unity or of defense of collective national interests or public services as a whole. This is a remarkable difference of framing from the other two Irish teachers' unions, which underscores the relevance of ideological legacies in mediating the conceptualization of interests of otherwise structurally similar unions.

Our findings have also shown that, on occasion, unions took approaches that may have seemed out of line with their broad ideological orientation. This testifies to the way in which ideological formations are not frozen, but rather themselves subject to contextual re-definition and "battles of ideas" whereby long-term ideological positions overlap with contingent ideas about the specific crisis context at hand. This is consistent with Hyman's original conceptualization of the "triangle" of union identity (2001). Indeed, Hyman argues

that unions' orientation emerges from the balancing act of reconciling two of the three pressures of class, market, and society. Our data demonstrate that the way in which unions manage this tension is not static and fixed but rather a dynamic process where the balance between the two competing forces may oscillate depending on the context within which the unions are operating.

To sum up, our findings demonstrate that incorporating an analysis of unions' long-standing ideological formations and contingent ideas can help us to make sense of the different decisions that otherwise structurally similar unions take regarding participation in or rejection of social concertation, in situations where "thin," deductive accounts of their supposed material or organizational interests face limits in explaining their puzzling choices. This consideration of unions' differing ideologies of social concertation has thus far been disregarded in the extant literature, which has either privileged institutional or interest-based accounts of their participation, or focused on social partnership being geared toward the pursuit of vague notions of "the national interest" (cf. Compston, 2003) without, however, elaborating further on its specific meaning for different actors. Our analysis shows instead how a more nuanced and systematic conceptualization of ideologies of social concertation, expanding the scope of Hyman's (2001) triangle of union identity, can considerably bring forward our understanding of unions' choices and agency when stuck between a rock and a hard place of equally seemingly "bad options" in the sphere of politics. Our analysis also helps to account for the resilience of social concertation in contemporary crisis times, by showing the ideational processes leading some segments of the labor movement to continue to adhere to an institutional practice even if this often offers only very limited gains. As such, the article contributes both to our understanding of the politics of social concertation and macro-concessionary bargaining, and of union action in hard times more broadly.

In broader terms, what do these findings tell us about the wider role of ideology in employment relations? Consistent with the argument of Hauptmeier and Heery (2014), our findings show that while institutions and structural context provide the broad perimeters of union action, unions retain significant agential discretion to respond differently to the context in which they operate; and that long-standing ideological positions play an important role in interaction with contingent ideas in shaping responses vis-à-vis similar contextual situations. Besides supporting the broad argument that "ideas matter" (Schmidt, 2008) in employment relations, our findings also show that attentiveness to the ideational dimension is important to correctly assess the political, historical, and social meaning of specific institutions, practices, and strategies. Indeed, while at a surface level, union responses to similar contexts may seem similar, these can indeed be motivated by very different ideological positions, to which a purely institutional or interest-based perspective is blind. For instance, as the comparison of the Irish and Portuguese cases shows, unions might choose to oppose social concertation but for widely differing reasons and ultimately very different political goals. An incorporation of ideological outlooks can make us sensitive to these differences, thus enabling an appropriate assessment of union strategies in both analytical and political terms, and of the different meanings and functions that can be attached to apparently similar practices and institutions.

ACKNOWLEDGEMENTS

The authors extend their warmest thanks to all research participants and to the special issue editors and three anonymous reviewers for the comments and feedback on the article. Arianna Tassinari gratefully acknowledges financial support received from the UK Economic and Social Research Council (grant number ES/J500203/1) which enabled the data collection that this article draws on; and the practical and intellectual support received from Alan Stoleroff and John Geary in conducting fieldwork in Portugal and Ireland, respectively. Open access funding enabled and organized by ProjektDEAL.

ORCID

Arianna Tassinari https://orcid.org/0000-0001-5437-935X
Jimmy Donaghey https://orcid.org/0000-0002-5453-8223
Manuela Galetto https://orcid.org/0000-0003-2685-2060

REFERENCES

Accornero, Guya, and Pedro Ramos Pinto. 2015. "'Mild Mannered'? Protest and Mobilisation in Portugal under Austerity, 2010–2013." *West European Politics* 38(3): 491–515.

Baccaro, Lucio. 2014. "Similar Structures, Different Outcomes: Corporatism's Resilience and Transformation (1974–2005)." *Review of Keynesian Economics* 2(2): 207–33.

Baccaro, Lucio, and Sang-Hoon Lim. 2007. "Social Pacts as Coalitions of the Weak and Moderate: Ireland, Italy and South Korea in Comparative Perspective." *European Journal of Industrial Relations* 13(1): 27–46.

Baccaro, Lucio, and Marco Simoni. 2008. "Policy Concertation in Europe: Understanding Government Choice." *Comparative Political Studies* 41(10): 1323–48.

Behrens, Martin, and Markus Helfen. 2016. "The Foundations of Social Partnership." *British Journal of Industrial Relations* 54(2): 334–57.

Benassi, Chiara, and Tim Vlandas. 2016. "Union Inclusiveness and Temporary Agency Workers: The Role of Power Resources and Union Ideology." *European Journal of Industrial Relations* 22(1): 5–22.

Blyth, Mark. 2002. *Great Transformations. Economic Ideas and Institutional Change in the Twentieth Century*. Cambridge: Cambridge University Press.

Bulfone, Fabio, and Arianna Tassinari. 2021. "Under Pressure. Economic Constraints, Electoral Politics and Labour Market Reforms in Southern Europe in the Decade of the Great Recession." *European Journal of Political Research* 60(3): 509–38.

Campbell, John L. 2004. *Institutional Change and Globalization*. Princeton: Princeton University Press.

da Campos Lima, Maria Paz, and Reinhard Naumann. 2011. "Portugal: From Broad Strategic Pacts to Policy-Specific Agreements." In *Social Pacts in Europe: Emergence, Evolution and Institutionalisation*, edited by Sabina Avdagic, Martin Rhodes, and Jelle Visser, 148–73. Oxford: Oxford University Press.

Cardoso, Daniel, and Rui Branco. 2018. "Liberalised Dualisation. Labour Market Reforms and the Crisis in Portugal: A New Departure." *European Journal of Social Security* 20(1): 31–48.

Carstensen, Martin B., and Vivien A. Schmidt. 2016. "Power Through, Over and In Ideas: Conceptualizing Ideational Power in Discursive Institutionalism." *Journal of European Public Policy* 23(3): 318–37.

Compston, Hugh. 2003. "Beyond Corporatism: A Configurational Theory of Policy Concertation." *European Journal of Political Research* 42(6): 787–809.

Culpepper, Pepper D., and Aidan Regan. 2014. "Why Don't Governments Need Trade Unions Anymore? The Death of Social Pacts in Ireland and Italy." *Socio-Economic Review* 12(4): 723–45.

Donaghey, Jimmy, and Paul Teague. 2005. "The Persistence of Social Pacts in Europe." *Industrial Relations Journal* 36(6): 478–93.

Donaghey, Jimmy, and Paul Teague. 2007. "The Mixed Fortunes of Irish Unions: Living With the Paradoxes of Social Partnership." *Journal of Labor Research* 28(1): 19–41.

Ebbinghaus, Bernhard, and Timo J. Weishaupt. (2021). *The Role of Social Partners in Managing Europe's Great Recession: Crisis Corporatism or Corporatism in Crisis?*. London: Routledge.

Edwards, Paul K. 1986. *Conflict at Work: A Materialist Analysis of Workplace Relations*. Oxford: Basil Blackwell.

Eurofound. 2011. *Government's First Bill Taxes Christmas Allowance | Eurofound*. Available at: https://www.eurofound.europa.eu/publications/article/2011/governments-first-bill-taxes-christmas-allowance. Accessed 20 September 2021.

Gago, Angie. 2021. "Power and Ideas: The Legitimisation of the End of the Irish Social Partnership Model during the Eurozone Crisis." *Irish Political Studies*: 1–21. https://doi.org/10.1080/07907184.2021.1880392.

Geary, John. 2016. "Economic Crisis, Austerity and Trade Union Responses: The Irish Case in Comparative Perspective." *European Journal of Industrial Relations* 22(2): 131–47.

Gerring, John. 1997. "Ideology: A Definitional Analysis." *Political Research Quarterly* 50(4): 957–94.

Gumbrell-McCormick, Rebecca, and Richard Hyman. 2013. *Trade Unions in Western Europe: Hard Times, Hard Choices*. Oxford: Oxford University Press.

Hamann, Kerstin, Alison Johnston, and John Kelly. 2012. "Unions Against Governments: Explaining General Strikes in Western Europe, 1980–2006." *Comparative Political Studies* 46(9): 1030–57.

Hamann, Kerstin, and John Kelly. 2004. "Unions as Political Actors: A Recipe for Revitalization?" In *Varieties of Unionism: Struggles for Union Revitalization in a Globalizing Economy*, edited by Carola Frege, and John Kelly, 93–116. Oxford: Oxford University Press.

Hardiman, Niamh, and Aidan Regan. 2013. "The Politics of Austerity in Ireland." *Intereconomics* 48(1): 4–32.

Hassel, Anke. 2009. "Policies and Politics in Social Pacts in Europe." *European Journal of Industrial Relations* 15(1): 7–26.

Hauptmeier, Marco, and Edmund Heery. 2014. "Ideas at Work." *International Journal of Human Resource Management* 25(18): 2473–88.

Hay, Colin. 2016. "Good in a Crisis: The Ontological Institutionalism of Social Constructivism." *New Political Economy* 21(6): 520–35.

Hodder, Andy, and Paul Edwards. 2015. "The Essence of Trade Unions: Understanding Identity, Ideology and Purpose." *Work, Employment and Society* 29(5): 843–54.

Hyman, Richard. 1999. "Imagined Solidarities: Can Trade Unions Resist Globalization?" In *Globalization and labour relations*, edited by Peter Leisink, 94–115. Cheltenham: Edward Elgar.

Hyman, Richard. 2001. *Understanding European Trade Unionism: Between Market, Class and Society*. London: SAGE.

Katzenstein, Peter J. 1985. *Small States in World Markets: Industrial Policy in Europe*. Ithaca, NY: Cornell University Press.

Kelly, John. 1998. *Rethinking Industrial Relations: Mobilization, Collectivism and Long Waves*. London: Routledge.

McLaughlin, Colm, and Chris F. Wright. 2018. "The Role of Ideas in Understanding Industrial Relations Policy Change in Liberal Market Economies." *Industrial Relations* 57(4): 568–610.

Mercille, Julien. 2014. *The Political Economy and Media Coverage of the European Economic Crisis: The Case of Ireland*. London: Routledge.

Molina, Oscar. 2006. "Trade Union Strategies and Change in Neo-Corporatist Concertation: A New Century of Political Exchange?" *West European Politics* 29(4): 640–64.

O'Connor, Francis et al. 2016. "The Presence and Absence of Protest in Austerity Ireland." In *Late Neoliberalism and Its Discontents in the Economic Crisis: Comparing Social Movements in the European Periphery*, edited by Donatella Della Porta, Massimiliano Andretta, Tiago Fernandes, Eduardo Romanos, Francis O'Connor, and Markos Vogiatzoglou, 65–98. Cham: Springer International Publishing.

O'Donnell, Rory, and Damian Thomas. 2002. "Ireland in the 1990s: Policy Concertation Triumphant". In *Policy Concertation and Social Partnership in Western Europe*, edited by Stefan Berger, and Hugh Compston, 167–89. New York, NY: Berghahn Books.

Offe, Claus, and Helmut Wiesenthal. 1980. "Two Logics of Collective Action: Theoretical Notes on Social Class and Organizational Form." *Political Power and Social Theory* 1(1): 67–115.

Panitch, Leo. 1981. "Trade Unions and The Capitalist State." *New Left Review* 125: 21–43.

Pizzorno, Alessandro. 1978. "Political Exchange and Collective Identity in Industrial Conflict." In *The Resurgence of Class Conflict in Western Europe since 1968*, edited by Colin Crouch, and Alessandro Pizzorno, 277–98, London: Macmillan.

Preminger, Jonathan. 2020. "'Ideational Power' as a Resource in Union Struggle." *Industrial Relations Journal* 51(3): 209–24.

Roche, William K. 2007. "Social Partnership in Ireland and New Social Pacts." *Industrial Relations* 46(3): 395–425.

Rodrik, Dani. 2014. "When Ideas Trump Interests: Preferences, Worldviews, and Policy Innovations." *Journal of Economic Perspectives* 28(1): 189–208.

Schmidt, Vivien A. 2008. "Discursive Institutionalism: The Explanatory Power of Ideas and Discourse." *Annual Review of Political Science* 11(1): 303–26.

Seawright, Jason, and John Gerring. 2008. "Case Selection Techniquest in Case Study Research: A Menu of Qualitative and Quantitative Options." *Political Research Quarterly* 61(2): 294–308.

Simms, Melanie. 2012. "Imagined Solidarities: Where is Class in Union Organising?" *Capital and Class* 36(1): 97–115.

Stoleroff, Alan. 2000. "Portugal: Union Development within the Changing Contexts of Political Economy and Industrial Relations." In *Trade Unions in Europe: Facing Challenges and Searching for Solutions*, edited by Jeremy Waddington, and Reiner Hoffmann, 451–98. Brussels: ETUI.

Stoleroff, Alan. 2014. "Radical Trade Unionism in Portugal: Between Maximalist Vanguardism and Ongoing Radicalisation." In *Radical Unions in Europe and the Future of Collective Interest Representation*, edited by Heather Connolly, Lefteris Kretsos, and Craig Phelan, 183–207. Oxford: Peter Lang.

Tassinari, Arianna. 2019. "*With or Without You? Concertation, Unilateralism and Political Exchange during the Great Recession: A Comparative Analysis of Italy, Spain, Portugal and Ireland*." Ph.D. Thesis, University of Warwick, http://wrap.warwick.ac.uk/149621/.

Tassinari, Arianna. 2021. *Reassuring the Markets: The New Politics of Social Concertation in Acute Crisis Times*. Max Weber Working Paper European University Institute, Chicago. https://cadmus.eui.eu//handle/1814/69723.

Teague, Paul, and Jimmy Donaghey. 2009. "Why has Irish Social Partnership Survived?" *British Journal of Industrial Relations* 47(1): 55–78.

Teague, Paul, and Jimmy Donaghey. 2015. "The Life and Death of Irish Social Partnership: Lessons for Social Pacts." *Business History* 57(3): 418–37.
Thelen, Kathleen, and Richard M. Locke. 1995. "Apples and Oranges Revisited: Contextualized Comparisons and the Study of Comparative Labor Politics." *Politics and Society* 23(3): 337–67.
Traxler, Franz. 2007. "The Theoretical and Methodological Framework of Analysis." In *Handbook of Business Interest Associations, Firm Size and Governance*, edited by Franz Traxler, and Gerhard Huemer, 10–37. London, New York: Routledge.
Walter, Stephanie, Ari Ray, and Nils Redeker. 2020. *The Politics of Bad Options. Why the Eurozone's Problems Have Been So Hard to Resolve*. Oxford: Oxford University Press.
Watson, Sara. 2015. *The Left Divided: The Development and Transformation of Advanced Welfare States*. Oxford: Oxford University Press.
Whittle, Andrea, and Frank Mueller. 2012. "Bankers in the Dock: Moral Storytelling in Action." *Human Relations* 65(1): 111–39.
Wright, Erik Olin. 2000. "Working-Class Power, Capitalist-Class Interests, and Class Compromise." *American Journal of Sociology* 105(4): 957–1002.

How to cite this article: Tassinari, Arianna, Jimmy Donaghey, and Manuela Galetto. 2022. "Puzzling choices in hard times: Union ideologies of social concertation in the Great Recession." *Industrial Relations* 61: 109–134. https://doi.org/10.1111/irel.12299.