PROTEST AND SOCIAL MOVEMENTS

Tiago Carvalho

Contesting Austerity

Social Movements and the Left in Portugal and Spain (2008-2015)

Amsterdam University Press

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Protest and Social Movements

Recent years have seen an explosion of protest movements around the world, and academic theories are racing to catch up with them. This series aims to further our understanding of the origins, dealings, decisions, and outcomes of social movements by fostering dialogue among many traditions of thought, across European nations and across continents. All theoretical perspectives are welcome. Books in the series typically combine theory with empirical research, dealing with various types of mobilization, from neighborhood groups to revolutions. We especially welcome work that synthesizes or compares different approaches to social movements, such as cultural and structural traditions, micro- and macro-social, economic and ideal, or qualitative and quantitative. Books in the series will be published in English. One goal is to encourage nonnative speakers to introduce their work to Anglophone audiences. Another is to maximize accessibility: all books will be available in open access within a year after printed publication.

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This research was conducted with the support of Fundação para a Ciência e a Tecnologia, with a scholarship (SFRH/BD/92778/2013), funded by the Ministry of Education and Science.

The proofreading of this text was supported by FCT through the Strategic Funding of the R&D Unit CIES-Iscte, Ref. UIDB/03126/2020 and the research project 'HOPES: HOusing PErspectives and Struggles. Futures of housing movements, policies and dynamics in Lisbon and beyond (2018-2021, FCT, PTDC/GES-URB/28826/2017).

The cover photo was retrieved from the website https://notificado.wordpress.com/.
The author Luís Canto provided permission to use this image.

Cover design: Coördesign, Leiden
Typesetting: Crius Group, Hulshout

ISBN 978 94 6372 284 1
e-ISBN 978 90 4855 249 8 (pdf)
DOI 10.5117/9789463722841
NUR 686

Amsterdam University Press

For Lara and Kyara

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Electioneering

I will stop
I will stop at nothing
Say the right things
When electioneering
I trust I can rely on your vote

When I go forwards you go backwards and somewhere we will meet

Riot shields
Voodoo economics
It's just business
Cattle prods and the IMF
I trust I can rely on your vote

– Radiohead, *Ok Computer*, 1997

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Acronyms

ECB	European Central Bank
EU	European Union
GJM	Global Justice Movement
IMF	International Monetary Fund
NATO	North Atlantic Treaty Organization
PASOK	Panhellenic Socialist Movement

Portugal

15O	Plataforma 15 de Outubro
BE	Bloco de Esquerda
CDA	Congresso Democrático das Alternativas
CDS-PP	Centro Democrático Social – Partido Popular
CGTP	Confederação Geral de Trabalhadores Portugueses
FP25	Forças Populares 25 de Abril
FSP	Fórum Social Português
GàR	Geração à Rasca
JSD	Juventude Social Democrata
M12M	Movimento 12 de Março
MAS	Movimento Alternativa Socialista
PCP	Partido Comunista Português
PEV	Partido Ecologista os Verdes
PI	Precários Inflexíveis
PREC	Período Revolucionário em Curso
PS	Partido Socialista
PSD	Partido Social Democrata
PSR	Partido Socialista Revolucionário
QSLT	Que se Lixe a Troika
RDA69	Regueirão dos Anjos 69
Ruptura-FER	Ruptura – Frente Revolucionária de Esquerda
UDP	União Democrática Popular
UGT	União Geral de Trabalhadores

Spain

CCOO	Comissiones Obreras
CGT	Confederación General del Trabajo
ETA	Euskadi Ta Askatasuna
IA	Izquierda Anticapitalista

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IU	Izquierda Unida
LOMCE	Ley Orgánica para la Mejora de la Calidad Educativa
PAH	Plataforma de Afectados por la Hipoteca
PCE	Partido Comunista Español
PP	Partido Popular
PSOE	Partido Socialista Obrero Español
UGT	Unión General de Trabajadores
UPyD	Unión Progreso y Democracia

Acknowledgments

The research for and writing of this book happened between Cambridge, Lisbon, Madrid, Florence, and Penamacor. Along the way I had the support, advice and encouragement of many friends and colleagues to whom I am thankful. In all these places I encountered people willing to listen to my doubts and questions. This book was born out of the challenge of accomplishing a thorough comparative study of the contentious responses to austerity in Portugal and Spain. My first acknowledgments go to Thomas Jeffrey Miley and Pedro Ramos Pinto for their close and engaged mentorship since the begginging of this project. I am proud to be able to count them as close friends these days.

I am grateful to the *Fundação para a Ciência e Tecnologia* for the four-year scholarship that supported me through most of my work. I am also thankful to Santander Bank, Wolfson College and the Cambridge Political Economy Society for funding the last stretch of writing.

I am thankful to the Carlos III – Juan March Institute at the Department of Social Sciences, University Carlos III in Madrid and its director Ignacio Sánchez-Cuenca for hosting me during my fieldwork in Spain and Portugal. I am also grateful to Donatella della Porta for her support. Not only did her work have a profound influence on the ideas developed throughout this book – Donatella was also generous enough to open the door of the *Scuola Normale Superior* and the Centre on Social Movements Studies in Florence, where I immersed myself in a vibrant community of social movement scholars.

Robert Fishman was kind enough to meet me and motivate me to pursue this study. Throughout my research, his generosity, support and mentorship were deeply inspirational and shaped much of the content of this book.

I would also like to thank Guya Accornero for always taking an interest in my work, but especially for her extraordinary mentorship over the last two years. Guya not only welcomed me into her project team, but made me a peer and trusted my experience and intuitions when studying the housing movement in Lisbon. Our conversations made me understand far better the part I want to play both in academia and in life. Also, a special word for Britta Baumgarten, who left us too soon. I saw Britta for the last time in the Summer of 2017, and it saddens me that I cannot hear her always kind thoughts on this book.

Special thanks to Swen Hutter for his support and advice, Teije Donker, and Filipe Carreira da Silva for always being available to advise me when

needed and for helping me to understand Cambridge far better. Also, to Manuela Caiani for supervising my work in Florence and introducing me to new areas of research. Thank you, as well, to Josh Booth for the excellent proofreading of this book. Furthermore, for their advice and conversations on my research I would like to thank Kostis Kornetis, Anastacia Kavada, David Bailey, Julia Rone, Kerman Calvo, Felipe González Santos, Enrico Padoan, Lorenzo Zamponi, and Loris Caruso. My fieldwork would not have been possible without the invaluable help of Irene Martín, Eduardo Romanos, Jorge Sola, Rubén Díez, Marcelo Moriconi, João Mineiro and Vanessa Almeida. Special thanks to Gomer Betancor who patiently commented on a previous version of the book, not only offering interesting insights but also correcting many mistakes regarding the Spanish case.

In Cambridge, to all my fellow colleagues for the fun and stimulating intellectual environment in the Department of Sociology. Especially Philip Luther-Davis, Naim Bro Khomasi, Damir Zhandossov, Rin Ushiyama, Katie Gaddini, Dilar Dirik, Peter Gardner, Mahvish Ahmad, Peter Walsh, Andrea Brody-Barre, Valentina Ausserladscheider, Ben Abrams, Asiya Islam, Gavin Stevenson, Olga Zeleneva, Arsenii Khitrov and Marcos Hernando. Furthermore, in Cambridge I would like to extend these thanks to Georgios Drakakis, Barzan Saadiq, Renaud Lejosne-Guignon, Veni Karamitsou, and Ana Dall'Agnol. Finally, a special thanks to Livi for everything.

To my friends, Bárbara, Rafael, Bruno, Ana, Pedro Candeias, Helena Lopes Braga, and Vasco Ramos. Finally, two friends contributed more than they know to this book. Tiago Moreira Ramalho, for his wisdom, knowledge and critical thinking, and who brought his well-informed heterodox insights about the European crisis and political economy to our many conversations. With Martín Portos, I had the luck to learn and improve my understanding of contentious politics and social movements.

Also, to my closest family, especially to my cousins José Manuel (rest in peace, Zé), Ana, Rui and Ana. Also, to my godparents Maria José and Manuel for their love and support.

Lastly, my father left us in July 2008, amid the turmoil that preceded the fall of Lehman Brothers in September that sparked the events described in this book. He never got to live through it, and throughout this research there was never a day that I did not think about him and what he would think of the political storm we have been experiencing since then. At the time, I was still an undergraduate student in Lisbon, and little did I know how my life would come to be shaped by these global events. I am sure he would be proud of what I achieved. Thankfully, I had the most supporting family. My mother and brother (and more recently my lovely nieces, to whom

I dedicate this book) kept and held me safe throughout this (not always easy) journey that is now coming to an end. I could not be more thankful for all the love they have for me.

Time now to move on to new (research) destinations. This is the culmination of a path: it is not the end, just a new beginning.

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Introduction

Abstract
This introductory chapter presents the dynamics of the contestation of austerity at the heart of this book, together with their historical context. Firstly, I introduce key elements of the political-economic context – such as the shift from embedded liberalism to neoliberalism – in which the Great Recession and Eurocrisis unfolded. Secondly, I describe how the crisis developed in Europe and how and why it affected the peripheral Southern European countries. I evaluate the anti-austerity contentious responses in Southern European countries, especially Portugal and Spain. Lastly, I present the structure of the following chapters and the book as a whole.

Keywords: austerity, protest, neoliberalism, Great Recession, Eurocrisis, Southern Europe

Starting point

In 2008, the collapse of the bank Lehman Brothers prompted the greatest world economic crisis since the Great Depression in 1929. The Great Recession, as it came to be known, spurred a transnational wave of protests and the emergence of new political actors across the world. Despite the differences in the political and economic regimes under which they emerged, protest movements across the world – from the Arab Spring and Occupy to new populist political parties – sparked and signalled new political dynamics. Even if in many ways similar to the political transformation of the "long 1960s" in Western Europe, these new movements led to the resurgence of economic grievances, long forgotten in social movement studies.

Upon the emergence of the transnational wave of protests, initial assessments advanced a culturalist, idealist and technophilic point of view that emphasised the break with past mobilisations such as the Global Justice Movement. In line with the new social movements theory, these assessments suggested that any movement emerging from the networked society in which

Carvalho, Tiago, *Contesting Austerity: Social Movements and the Left in Portugal and Spain (2008-2015)*. Amsterdam: Amsterdam University Press 2022
DOI: 10.5117/9789463722841_INTRO

we were living would be a networked movement in which information and communication technologies shaped the "bubbling up" of subterranean politics (Castells, 2012; Kaldor & Selchow, 2013). Ignoring the historical, cultural and political contexts, the stress was placed on the relative homogeneity of the movements across countries, as a new generation of precarious youth activists seemed to have spontaneously emerged with demands for democratic renewal and the recovery of the political sphere by citizens. From this perspective, social media allows autonomous communication and connects groups around the world (Castells, 2012). Still, even if formed on the Internet, it was by occupying public space that these movements manifested and became levers of social and political change. Although the role of the Internet cannot be denied, these movements' spontaneity was only a matter of appearance. However, many of these assessments focused on only one event or case-study, the movements' rejection of the existing party system, and their symbolic and cultural discourses and innovations in repertoire.

Contrasting with this perspective, and enlarging the scope of the analysis, in this book I analyse the contentious responses to austerity in Portugal and Spain in the context of the Great Recession between 2008 and 2015. Throughout this period, I will focus on the relations between different sets of players, their evolution over time, and the resulting outcomes. Contestation went beyond street politics: as a result of austerity policies there emerged an anti-austerity arena, which included both institutional and non-institutional players. Rather than being similar across countries, past mobilisations and interactions between players within specific countries are constantly making and re-making the patterns of protests found. Consequently, the anti-austerity cycle of contention results not only from the policies enacted and the opportunity structures and threats, but also from players' own strategies and interactions.

Rather than being spontaneous, in many ways the contentious responses to the Great Recession reflected previously existing structures of mobilisation and frames (Flesher Fominaya, 2014). Contestation of austerity during this period was a complex phenomenon in which movements were only one part of the story. The overall argument of the book is that the impact of structural adjustment programmes and austerity are not fixed. Rather, the formation of an anti-austerity arena is dependent on the history of past mobilisations and the interactions between institutional and non-institutional players throughout the cycle of protest. As such, we require a dynamic and relational analysis that considers not only austerity and the political opportunity structures, but also players themselves.

By analysing Portugal and Spain, and adopting a cycle-based approach, I show that anti-austerity contestation went beyond social movements: these players need to be situated within a broader landscape. As such, I make a series of interrelated arguments about how the cycle of protest develops in the two countries, showing that it can follow distinct paths depending on the configuration of anti-austerity arenas – i.e. the relationship between institutional and non-institutional players. In addition to considering the players contesting austerity, I analyse how frames and claims develop: as will be seen, anti-austerity discourses moved from a rhetoric of representation to demands on redistribution (which tends to be overlooked), as trade unions became increasingly visible.

The contentious politics of neoliberalism

Despite the apparent novelty of the wave of contention resulting from the Great Recession, there have been similar processes in other parts of the world over the last 40 years. The lyrics in the epigraph of this book remark on the interrelation between institutional politics and protests against internationally led austerity measures (*Riot shields/ Voodoo economics/ It's just business/ Cattle prods and the IMF*). Released in 1997, "Electioneering" addresses – among other topics – the divide between electoral politics and citizens, suggesting that low trust in institutions, protest and police violence are intimately connected to economic policies that widen inequality. Even if protest movements have been at the centre of the political landscape since the eruption of the financial and economic crisis, it is important to note that the structural adjustment programmes implemented by the International Monetary Fund (IMF) since the 1980s produced a similar crisis of legitimacy, intense protest mobilisations, political backlashes and the emergence of populist parties (Roberts, 2012).

Since the 1970s the turn from embedded liberalism to neoliberalism – which is understood here simply as policies that diminish the role of the state and boost the role of markets – led to the retrenchment of the welfare state and marketisation of public goods, accompanied by the rise of unregulated financial markets (Anderson, 2000; Harvey, 2007; Mann, 2013; Streeck, 2012, 2013; Tooze, 2018). This paradigm shift in political-economic policy has taken place not only because of the growing importance of International Financial Institutions, but also due to the influence of ideas closely related to those of the Washington consensus, where debt crises played an important role in transforming policy architectures (Babb & Kentikelenis, 2016; Hall, 2012; Kentikelenis, Stubbs, & King, 2016; Roos, 2019; Tooze, 2018).

As a manifestation of the economic transformation of the last 40 years, the Great Recession (understood here as a "triple crisis" of banks, public finance and the "real" economy) was the result of the financial expansion of unregulated shadow banks, global imbalances, and the private debt produced by "privatised Keynesianism," in which stagnant real wages led to dependence on credit for consumption in order to maintain living standards amid welfare retrenchment (Mann, 2013). As a result, frictions between capitalism and democracy increased (Barber, 2000; Fitoussi & Saraceno, 2013; Mann, 2013; Offe, 2013a; Streeck, 2012). Post-war democratic capitalism involves a tension between the interests of markets and those of voters: market requirements make democratic institutions less responsive to citizens' needs as states have primarily to fulfil the desires of markets. Citizenship is thus reduced to its electoral dimensions, ignoring, for the most part, social rights (della Porta et al., 2016; Roberts, 2008; Schäfer & Streeck, 2013).

As a solution to the Great Recession, governments implemented austerity, claiming that "there is no alternative" to market liberalisation, retrenchment and privatisation policies, which were viewed as a unique and mandatory solution in order to regain market trust (Blyth, 2015; Reis, 2013; Tooze, 2018). More than a precise concept, austerity is a buzzword used to disguise market liberalisation and class politics under the veil of morality, simplicity and virtue (e.g. live within our means, compensate hard-working people, etc.) (Blyth, 2015). As a policy regime, austerity involves the reduction of the state's budget through a combination of welfare retrenchment, privatisation, a roll-back of universal social policies and labour market protection. Thus, it incorporates the idea of extending market competition while limiting state activity, leading to outcomes such as diminishing labour costs and increasing capital accumulation. Austerity is not a new phenomenon, however, and it has been designated throughout history using terms such as "structural reform" or "liquidation" (Blyth, 2015).

The consequences of austerity and market liberalisation go beyond rising unemployment, low growth, and economic stagnation. The resulting crisis of redistribution, through cuts in social services and social rights, leads to an increasing distrust in institutions which brings back the "social question" and class politics (della Porta et al., 2016; Judt, 1997). These policies, which are detrimental to most of the population, also result in growing inequality and tensions between the national and global arena, diminishing the capacity of those with fewer economic resources to make use of state power to implement change (Mann, 2013). Since 2008, these conditions have led to rising political discontent among citizens and

protests against mainstream political parties and technocratic governments. Responses outside the institutional sphere emerged in the form of alternative political movements and counter-movements, with subsequent effects on the institutional sphere as populist parties emerged (della Porta et al., 2016; Flesher Fominaya, 2017; Crouch, 2004; Mair, 2006; Schafer & Streeck, 2013).

Consequently, the Great Recession provoked a resurgence of debates about capitalism in mainstream social movement studies, with scholars of the latter attempting to build bridges with political economy (Bailey, Clua-Losada, Huke, Ribera-Almandoz, & Rogers, 2018; Císař & Navrátil, 2017; della Porta, 2015, 2017; della Porta et al., 2016; Hetland & Goodwin, 2013). To do this, we need to account for how the interaction between crisis, market liberalisation and national contexts produced different types of counter movements around the world. A broad perspective combining the features of the socioeconomic crisis and austerity, the political cultures of these countries, and the reactions to political opportunity structures and threats is thus required.

Taking all of these elements into account, Polanyi provides a framework for understanding both the dynamics and counter-dynamics of market liberalisation at different levels. In *The Great Transformation,* he (1944) shows that in response to a movement of planned market liberalisation and domination over other societal spheres, a spontaneous and plural countermovement of protection emerges. As Burawoy remarks, in Polanyi's approach, society is in "contradictory tension with the market" (Burawoy, 2005, p. 199), and this generates multiple opposition actors. As such, in Polanyi's view "the market tends to destroy society, but on the other hand, society (re)acts to defend itself and to subordinate the market" (Burawoy, 2005, p. 198).

A Polanyian framework can thus be used to better understand the dynamics of the contentious politics of neoliberalism, allowing us to situate the anti-austerity cycle in context and understand the plurality of counter-movements for protection against further economic liberalisation that has emerged with it (Roberts, 2008). As with austerity, the so-called structural adjustment programmes led by the IMF in Latin America in the 1980s and 1990s led to protest mobilisations and political transformations (Ortiz & Béjar, 2013; Roberts, 2008, 2012). Thus, there is a need to consider the relationship between neoliberal globalisation and its counter-currents in a different way. Rather than focusing on the (dis)continuities between different waves, we should focus on the different levels at which market liberalisation happens and to what kind of resistance is it conducive.

If global justice movements were the core actors contesting neoliberal dynamics at a transnational level until the outbreak of the Great Recession, with the anti-austerity movements the academic literature shifted to consider national manifestations of the same phenomena (which could have been seen already in Latin America). Though we should not deny the difference between the global justice movements and anti-austerity cycles (della Porta, 2012), they are both reactions to processes of market liberalisation, albeit reactions that operate at different scales of governance. Anti-austerity and global justice movements can thus be seen as reactions at different levels to similar issues. Repertoires, strategies and discourses appear to be continuous over time, transferable and adaptable depending on the locus and phase of the conflict.

European crisis

The Eurozone crisis is, to a certain extent, part of the broader historical dynamics described in the previous section. The European financial and debt crisis was the most severe political and economic crisis since the creation of the European Union (EU), questioning both the nature and future of European integration, with repercussions that extended far beyond the crisis. It was not a simple extension of the global financial crisis, even if it followed on from it, but rather an unusual financial crisis that developed within a supranational monetary union among developed countries (Tooze, 2018).

The way the national crises evolved was deeply embedded in European dynamics. Three major phases can be identified, involving the interplay between markets, the EU institutions, and the responses of different member states – particularly those most affected by the crisis.[1] In the aftermath of the 2008 crash, the main measures of a first phase concerned the bailout of banks to protect the financial system. These expansionary policies were soon followed by a brief neo-Keynesian second phase that lasted until the beginning of 2010, with the EU institutions encouraging countries to use public investment to prevent recession (Copelovitch, Frieden, & Walter, 2016; Hall, 2012, 2014).

Nevertheless, the Greek debt crisis erupted after the country's 2009 general elections. The new Greek government revealed that their budget deficit was higher than previously predicted. This third phase triggered

1 See Appendix I for a full chronology of the events considered key in the literature for the development of the European Crisis.

a reorientation of policy at both European and national levels as market pressures started to rise. As the risk of contagion to other countries increased, the weakest links of the Eurozone – Portugal, Spain, Italy and Ireland – shadowed by the EU, followed a "budget consolidation" strategy to reduce their debts and deficits to "gain market trust." As the austerity phase began (Ramalho, 2020; Reis, 2013), these countries adopted programmes, either imposed or self-implemented, to pursue these objectives.

In 2010, two countries were bailed out (i.e., were given an official credit line) under the auspices of the so-called Troika.[2] The first bailout was granted to Greece in mid-2010; after this came Ireland, at the end of the year. In 2011, Portugal would join the club. Finally, in 2012, Cyprus and Spain requested assistance for their banking systems. Although Italy was never officially under assistance, since it was deemed "too big to bail" (Perez & Matsaganis, 2018), a technocratic government took emergency measures supported by a broad coalition of political parties.[3] By 2013-2014 a post-austerity phase had begun, with all the countries' assistance programs coming to an end, even if the restrictions associated with the Eurozone have been maintained to this day. Within this story, Greece continued to be the outlier; in 2012 it would receive a second bailout and haircut, and in 2015, after tense negotiations with the European institutions and a referendum led by SYRIZA, the country received its third bailout.

Even if almost all the costs of this crisis were imposed on individual countries, there were also measures taken at European level to facilitate the conditions under which the bailouts could operate at national level. Most notably, these measures included the creation of the European Financial Stability Facility (May 2010), the European Central Bank's (ECB) decision to buy sovereign debt on secondary markets, the establishment of a permanent crisis resolution mechanism (December 2010) by the European Council, and the beginning of quantitative easing (January 2015). Most importantly,

2 "The Troika" refers to the joint action decision group comprising the IMF, the European Commission and the European Central Bank (ECB), which imposed conditionality programmes on the countries under its auspices in order to lend money to them.

3 It should be noted that a variety of bailouts and technocratic governments existed in each country. For instance, even though Portugal never had a technocratic government, the finance minister Vítor Gaspar (2011-2013) had no party affiliation and held credentials with several of the international institutions (today he holds a post in the IMF). In Spain, the PP government elected in 2011 had Luís de Guindos, an independent close to the PP, overseeing the treasury and economy (today he is a vice president of the European Central Bank). For about six months Greece had Lukas Papademos as prime minister leading an independent government with the parliamentary support of the major political parties in the country (November 2011 to May 2012); previously he had been vice president of the ECB.

there was the declaration of the then president of the ECB, Mario Draghi, in July 2012, that the ECB would do "whatever it takes to preserve the Euro."

Overall, the Eurocrisis was a result of a combination of imbalances within the currency area, allied to deficiencies in the design of the European Monetary Union that had been known about since its inception, such as: (1) a macroeconomic divergence, resulting from imbalances between zones with different economic structures that provided incentives for the cash-strapped half of the union to borrow from the other half, reinforcing differences; (2) a lack of fiscal policy coordination; and (3) fragmented financial regulation (Copelovitch, Frieden, & Walter, 2016; Hall, 2012, 2014; della Porta et al., 2016).

The already existing differences in economic organisation within the Eurozone were reinforced by the creation of the common currency. While the northern countries have export-led economies, the southern ones have domestic demand-driven economies (Hall, 2014). Nevertheless, most of the southern countries, with the possible exception of Greece, had good economic performance indicators and reasonable budget deficits in the years preceding the crisis. Still, the consequent liberalisation measures taken under austerity came to reinforce a pre-existing liberalisation trend (e.g. levels of employment protection dropped more in these countries than in others). This crisis exposed the frailties and asymmetries within the Eurozone, especially trade deficits in the periphery and surpluses in the core. The asymmetric integration at the European level led to continuous trade deficits in the south and after that to debt. What Portugal, Spain, Italy, Greece and Ireland had in common before the crisis was not public sector debts but rather their growing trade deficits (Blankenburg, King, Konzelmann, & Wilkinson, 2013; Hall, 2014; Reis & Rodrigues, 2012; Tooze, 2018). The fiscal imbalance was thus a symptom, not a cause, of the crisis.

In sum, an economic and financial crisis with weak and uncoordinated responses led to a *political* crisis. In della Porta's (della Porta et al., 2016) view, rather than a typical crisis of scarcity or inflation, the Eurozone crisis can be understood as a crisis of redistribution, featuring state retreat from social service provision and the erosion of social rights, leading to an undermining of consent, with concomitant declines in the levels of trust in institutions. Sánchez-Cuenca (2014b) called this a top-down approach, whereby non-elected institutions imposed economic policies on national governments – in his terms, an expression of "democratic powerlessness."[4] Rather than an institutional crisis at the national level, *per se*, we are looking at the incapacity of the political system to respond to the international

4 Translation of *Impotencia Democrática*.

pressures and constraints imposed by non-elected technocratic institutions. This implicated different but interconnected analytical levels, such as the national context and broader European dynamics.

As a consequence, Offe (2013b) identified a spectrum of reactions to this crisis, involving both protests and transformation of the party systems across Europe. On the one hand, there was a collapse of the party system and a reinforcement of both the far right and far left. On the other hand, there was an emergence of protest movements alongside "ephemeral eruptions of mass violence" among the most excluded populations. Nonetheless, rather than viewing these reactions in isolation, I will later suggest that they should be interpreted as part of a longer contentious process involving the interaction between institutional and non-institutional players.

The politics of austerity in the Southern European countries

As seen in the previous section, the Eurozone crisis affected mostly the Southern European countries and Ireland due to imbalances within the Eurozone. Despite the economic resemblances between these countries and their similar positions within the Eurozone, the political impact of the crisis diverged due to their different political institutions, civil societies, and histories.

As Malefakis (1992; 1995) observes, scholars first grouped together the Southern European countries because of their common path towards modernisation and democratic politics since the 1970s. These countries can be conceived predominantly as a single socio-political and historical entity due to the remarkable historical parallels between them. A specific field of study was therefore established from the late 1970s onwards, and especially in 1980s. Constituting a semiperiphery (Arrighi, 1985), the Southern European countries are distinguishable from other European peripheries – like that of the Eastern European countries – due to their internal social and economic heterogeneity, rather than ethnic and linguistic conflicts (with only Spain displaying such conflicts (Miley, 2013, 2014)). These countries had a mix of rural, urban and industrial classes until the 1970s. After this point, following the emergence of democratic regimes and the welfare state, education levels rose and class structures changed: while the rural classes declined, the number of professionals and employees grew with the increasing importance of the service and public sectors. Even so, previous social dualities did not vanish; instead, they were transformed: though a change can be perceived, these continue to be the most unequal countries in Europe (Carmo, 2010).

The transition to democracy in the mid-1970s is considered to have been a turning point for Portugal, Spain and Greece (Fishman, 1990a; Gunther, Diamandouros, & Sotiropoulos, 2006). Gunther, Diamondourous and Sotiropoulos (2006) argue that democratisation, socioeconomic modernisation, and Europeanisation led these countries to approximate Western politics and social patterns – thus a certain leapfrogging occurred, both in economics and politics. Despite some convergence, European integration nevertheless led to asymmetric modernisation, due to the specificity of these countries' integration and position in the EU, which resulted in a debt crisis and austerity (López & Rodríguez, 2011; Reis & Rodrigues, 2012).

Regarding the Euro crisis, Hall (2012, 2014) contends that if there was a concerted response by the EU, it was still slow and insufficient, with the majority of the costs being imposed on Southern European countries in order to reduce their budget deficits. Furthermore, the EU demanded an acceleration of previous structural reforms to the Southern European countries: the focus was mainly on internal devaluation by reducing labour costs to restore international competitiveness (Perez & Matsaganis, 2018). With that said, even if these countries are demand-driven, this does not explain the differences between their austerity policies. Greece and Portugal were tied to programs dictated by the Troika, while Italy and Spain, due to the relative size of their economies in the EU context, had more leverage to implement their own responses (della Porta et al., 2016; Perez & Matsaganis, 2018). Yet the government in Spain implemented a harsher program than in Portugal.

In both Portugal and Spain, budget cuts were announced in the public sector throughout 2009 and 2010 (later extending to the private sector through taxation and labour reforms) (Reis & Rodrigues, 2012; Salmon, 2017), particularly after the Greek debacle at the end of 2009. These measures were undertaken by centre-left parties (the PS – *Partido Socialista* and the PSOE – *Partido Socialista Obrero Español*) who happened to be in government until the election in 2011 of right-wing governments in both countries. The new conservative governments delivered similar plans to those formulated by the previous governments and influenced by the markets and the European institutions (Moury & Standring, 2017; Salmon, 2017). These measures included labour reforms in both countries at the beginning of 2012, the privatisation of strategic sectors and bailouts of banks.

At the same time, there were also important differences. Apart from the external intervention, Spain – unlike Portugal – had a housing bubble that burst in this period. In addition, in Spain many policies were aimed

at privatising parts of the health and education sectors. Despite the labour cuts in these sectors in Portugal, such measures were never seriously attempted. Also, the Portuguese Constitutional Court blocked some of the measures undertaken by the government. By 2014, in contrast to Greece, as external constraints began to ease the economic situation improved in both countries.

A crisis that was initially economic and political became social due to welfare retrenchment. The impact on the labour market entailed declining income, rising unemployment and underemployment, and a general erosion of social rights. Labour devaluation measures led to a sustained wave of emigration from these countries to those of Europe's core. Perez and Matsaganis (2018) show that the policies of internal devaluation had distributive consequences, in that inequalities did not rise in Portugal, despite the consolidation measures. In this sense, in comparative terms, the crisis and austerity had a stronger impact in Spain.

As such, although imbalances contributed to the crisis within the Eurozone, the responses to it were aimed at national political institutions and hence varied across national contexts. The result was not only a decline in satisfaction with democracy, the economy, national governments and the EU, but also an increase in levels of discontent, disaffection and delegitimation among citizens (Morlino & Quaranta, 2016; Portos, 2021). These reactions were directed particularly towards national institutions, such as political parties and governments, in countries that were already marked by political disaffection (Magalhães, 2005; Montero, Gunther, & Torcal, 1997).

Given these findings, a comparison between Portugal and Spain becomes especially fruitful due to the similar political scenarios in a time of crisis, with no electoral instability until the 2015 elections, and with socialist governments being followed by right-wing majorities. At the same time, when it came to protest, in Spain new players emerged, creating disruptive dynamics, while in Portugal traditional actors were dominant. In fact, these countries displayed differences in both the frequency and nature of their protests (Accornero & Ramos Pinto, 2015; della Porta et al., 2016; Portos, 2019; Portos & Carvalho, 2022). As for the transition to democracy in Portugal and Spain (Fishman, 1990a), during the most recent crisis, though the semi-peripheral context of these countries (i.e. their positioning vis-à-vis Europe) certainly contributed to the paths followed, their political trajectories did not follow a "unified logic." Attention thus needs to be paid not only to features related to the socio-economic crisis, but also to the political reactions to it, understood with reference to the opportunities, threats, and political cultures in each country (della Porta et al., 2016).

Contesting austerity in Southern Europe

A sustained wave of protest emerged in all of the Southern European countries (Accornero & Ramos Pinto, 2015; della Porta et al., 2016; Portos, 2019; Portos & Carvalho, 2022; Quaranta, 2015). As with other processes of market liberalisation, the contentious responses to austerity involved multiple players (Roberts, 2008) such as precarious youth, and public and blue-collar workers (della Porta et al., 2016). In contrast to the anti-globalisation movement, protests were nationally grounded. Protestors made wide use of internet technologies as a means of mobilisation, maintained a horizontal character, and proved capable of expanding their bases beyond activists, incorporating new people into broad protests (Castells, 2012; della Porta et al., 2016; Flesher Fominaya, 2017; Gerbaudo, 2017). In the course of this wave of contention, a transnational, shared frame emerged and thereafter diffused – one based on the idea of "citizenship," and which developed not against democracy, but instead demanded its renewal.

Depending on the national context, contentious responses to austerity had different configurations. In Spain, in mid-2011, the 15M movement emerged, occupying squares in cities all over the country, which led to the creation of local grassroots assemblies and movements in defence of public healthcare and education, among other things (Castells, 2012; della Porta et al., 2016; Hughes, 2011; Portos, 2016). Forging links between parties and social movements was difficult, both because of the mistrust of the parties, particularly *Izquierda Unida* (IU), towards the movements, and also because of anti-party and anti-union sentiment within the movement (Castells, 2012; Flesher Fominaya, 2007, 2014; Ramiro & Verge, 2013). The links between these players developed only at a later stage of the cycle, with trade unions joining movements' mobilisations such as the *Mareas* (Romanos, 2016; Portos, 2019; Portos & Carvalho, 2022).

By contrast, in Portugal, even though different social movements also arose between 2011 and 2013, no new political party was electorally successful. Instead, "old" actors dominated the landscape. Baumgarten (2013) divides the 2011 protests in Portugal into union-led demonstrations and general strikes; independent protest events; and social movement platforms or occupations of public spaces. Throughout the cycle of protest, various links developed between institutional and non-institutional players. The *Confederação Geral de Trabalhadores Portugueses* (CGTP), the dominant trade union in the protests, is directly linked to the *Partido Comunista Português* (PCP). During the first phase of protest, these two players avoided giving organisational support to much of the movements' protests, but

later on, as their messages evolved, collaborations emerged, though more disruptive players remained sidelined (Carvalho & Ramos Pinto, 2019). The *Bloco de Esquerda* (BE) was a major player from the beginning, developing close connections with activists (Lisi, 2013). As Soeiro (2014) observes, poly-membership, or belonging to various groups, prevailed throughout the cycle. Players remained very close to each other, as the networks were small and groups such as *Que se Lixe a Troika* were very close to the political parties. In fact, the occupation of public spaces and the creation of public assemblies around Lisbon were merely momentary episodes (Baumgarten, 2017a; Carvalho, 2014). Autonomist and libertarian groups formed the basis of these assemblies, and even though they participated in protests, they never led any campaign successfully and were not able to reach the same level of success as comparable groups in Spain or Greece (Kentikelenis, 2018; Kotronaki & Christou, 2019; Portos, 2019).

In addition, stemming from this wave of protests, between 2009 and 2015 a range of transformation took place in the party system, with the emergence of new political parties and alliances, especially in the form of movement-parties (della Porta, Fernández, et al., 2017). Most notably, a wave of populism emerged with parties such as SYRIZA, *Podemos* and the Five Star Movement replicating, at least discursively, the idea of direct democracy that was advocated by the movements. As a consequence, by 2015 in all of these countries the parties that held majorities for several decades had lost their hegemony (Martín & Urquizu-Sancho, 2012; Rodríguez-Teruel et al., 2016; Rodríguez Teruel & Barrio, 2016; Vidal, 2018).

We can also distinguish among more and less stable countries vis-à-vis their institutional and electoral processes. On the one hand we have Portugal and Spain which, from the electoral cycle of 2010-2011 (Bosco & Verney, 2012; Verney & Bosco, 2013) up until the 2015 elections, did not change government; on the other hand, Italy and Greece had different governments during this period, some of them of a technocratic bent.

However, these countries diverged after 2015. In Spain, *Podemos* and *Ciudadanos* (Miley, 2017; Orriols & Cordero, 2016; Rodríguez-Teruel et al., 2016; Vidal, 2018) emerged, deepening the ongoing constitutional crisis in a parliament with no clear majority, with the PP remaining in power after a second general election in June 2016 (Miley, 2017). From 2014 onwards, *Podemos*, a new political party, took advantage of the political opportunity structure created by the movements, particularly after electing five MEPs in May 2014 (Miley, 2017; Orriols & Cordero, 2016; Ramiro & Gomez, 2016; Rodríguez-Teruel, Barrio, & Barberà, 2016; Sola & Rendueles, 2018). At the local and regional levels, new political forces such as *Ahora Madrid* and

Barcelona en Comú, closer to the activists, also emerged. In Portugal, by contrast, an unprecedented shift in terms of party alliances led to a parliamentary pact between the PCP, BE, Greens (PEV), and *Partido Socialista* (PS). For the first time in history, a minority PS government was supported by an alliance of left-wing parties (Accornero & Ramos Pinto, 2020; Lisi, 2016). Finally, in Greece, SYRIZA formed a government, replacing PASOK, the Greek Socialist Party, as the main force on the left of the political spectrum (Tsakatika, 2016).

As can be seen, contestation of austerity in the Southern European countries involved a plurality of players. It ranged from contestation in the streets – both by traditional actors such as trade unions and by newly formed social movements – to new political parties. In her cross-country processual comparison, della Porta (della Porta et al., 2016) points to a combination of institutional and non-institutional factors driving the contentious cycle, such as the political conditions amidst the crisis, the way left-wing parties absorbed and managed its fallout, and the declining trust in institutions (both national and European), the opportunities and threats resulting from the crisis, and the different types of protest that emerged. In line with this perspective, Roberts argues in a similar vein that it is "essential to think beyond the short-term political dynamics of crisis management to consider the longer-term institutional legacies and fragilities of the different political alignments forged around crisis-induced policy reforms" (Roberts, 2017, abstract).

When considering these cases and scenarios, two sets of competing hypotheses are plausible. On the one hand, a more classical, grievance-based model would view these divergent reactions and outcomes as the consequence of the different austerity measures implemented, specifically the unique set of grievances they generated. On the other hand, a second set of hypotheses focuses directly upon national-level political institutions and political processes to propose that, even if the crisis and its impact can explain at least some aspects of contention, the way that institutions and actors manage the crisis nevertheless remains key. Within this second type of hypothesis, a first step highlights the way austerity and the crisis are managed by institutional actors and representative institutions (political parties, parliaments, etc.), and a second step examines their responsiveness and openness to protest grievances: because institutions and actors are responsive to protest grievances and demands, they end up channeling discontent that leads to demobilisation. Therefore, in this perspective, to give an example, the lower number of protests by social movements in Portugal when compared to its Southern European counterparts, rather

than reflecting a less severe crisis impact, reveals not only the capacity of institutions to absorb and manage austerity to mitigate its harm, but also the capacity of existing left-wing parties in parliament to channel discontent.

Robert Fishman proposes that the divergence between Portugal and Spain is linked to the nature of democratic practice resulting from the divergent paths taken in the transition to democracy (Fishman, 2010, 2011, 2012a, 2012b, 2013, 2017, 2019; Fishman & Cabral, 2016; Fishman & Everson, 2016; Fishman & Lizardo, 2013). In the case of Spain, though protest was essential in shifting the public agenda and influencing institutional actors, Fishman points out that the potency of the protests was the result of institutional players' exclusion and delegitimation of protesters. As a consequence of the lack of institutional openness to citizens' demands and grievances, protest was the only remaining channel. Portugal, in his view, presents a contrasting scenario where the openness and inclusiveness of the institutions resulted in deeper collaboration and engagement among actors. As such, in Spain, movements must resort more frequently to disruption to attain their objectives, whereas in Portugal, institutional and non-institutional actors engage in a conversation,[5] as institutions are more open due to the institutional and cultural legacy of the revolution (Fishman & Everson, 2016).

Adding to this perspective, and building on Fishman's work, Tiago Fernandes (2016) highlights the importance of the specific political context – one that provided allies, voice, and resources for social movements – for explaining the singularity of Portuguese protest dynamics in times of recession. Another critical factor is the institutional settings that moderated the impact of the crisis. In particular, Fernandes points to the existence of a strong network of state-civil society partnerships for policy delivery to the poor, as well as the Constitutional Court action that overturned many of the harshest austerity measures. In other words, the Portuguese institutions were more inclusive, since the institutional left – comprising political parties and trade unions – was more receptive to hearing and articulating the demands of those protesting in the streets. A variety of other factors are important, too, such as the country's size (both in terms of population and area), the intensity of the austerity programs implemented and how they were managed, and especially the nature and quality of the political institutions that emerged with democracy. In Portugal, although there was a specific program of austerity under the auspices of the Troika, this program

5 Building on his transitional and culturalist argument, Fishman points out that in a typical conversation the demonstrations end up at the doorsteps of Parliament, and protestors are invited to the Parliament.

was not only less austere than in Spain, but the measures also attenuated its negative impact on those in the lower strata of the population (Perez & Matsaganis, 2018). The distributional impact was therefore comparatively less harsh, resulting in lower growth in inequality and unemployment, and thus fewer protests (T. Fernandes, 2016).

However, as the authors of the contentious politics approach propose, democratic regimes do not diminish the role of protest and social movements but rather have a crucial role in its expansion, because they are paramount in shaping and redefining the political sphere. Even if both the economic crisis and institutions can explain the different forms of contention, they do not fully explain variations in the cycle of protest. As such, it remains necessary to consider the inner workings of the political process and the power relations between players. Rather than assuming that protest is simply channelled, it is important to analyse the relationship between institutional and non-institutional players and understand how it shapes the cycle of protest and its outcomes. Even if the previous perspectives look at the way that different national political settings mediate the effects of the Eurozone crisis on contentious responses, they take a comparatively static approach. Ours, by contrast, will consider the internal power dynamics of the contention cycle, where agency plays a crucial role.

Contesting austerity: social movements and the left

This study of the dynamics of resistance to neoliberalism, crisis and austerity in Portugal and Spain will provide evidence of how political players reacted to, adapted to and managed the crisis, leading to the rise of an anti-austerity arena of contention. Moreover, this book will contribute to essential debates not only in the field of social movements in contexts of market liberalisation and crisis, but also on the nature of Iberian and Southern European democracies. The intersection of these topics will be crucial to understanding how social movements and contentious politics play a role in processes of political change.

Contesting Austerity is the first book to take a comparative approach to the Portuguese and Spanish anti-austerity mobilisations. While most studies focus on single case studies, this work benefits from a paired comparison that provides a broader understanding of the political processes and mobilisation in the two countries. In contrast to Fishman's work (2019) about Portugal and Spain, even if partially following and in debt to it, this comparison focuses solely on the period of the Great Recession. Moreover, Fishman interprets

the events of the protest cycle through institutions' degree of openness to civil society actors and political culture: political discontent is channelled through institutions in Portugal, while in Spain institutional closedness invigorates street politics. *Contesting Austerity*, meanwhile, proposes that the differences result from social movements' degree of autonomy from institutional players: if in Portugal institutional players curtailed movement actions by interfering in the development of the cycle of protest, in Spain movement autonomy vis-à-vis trade unions and political parties allowed for a reconfiguration of the anti-austerity protest arena.

The book combines the notion of "contentious politics" with recent concepts in social movement theory, namely those of "players" and "arenas" (which are defined in the next chapter). This articulation allows us to move away from the more structural aspects of the "contentious politics" perspective, while retaining a cycle-based approach, and introduces the idea that the interactions between players shape both the protest cycle and the formation of the anti-austerity arena. Most work on the anti-austerity contentious wave tends to focus on specific events, cases or groups without looking at the full range of forms of contestation. By taking a cycle-based approach, rather than focusing solely on social movements, this book looks to the interactions between institutional and non-institutional players. Its most original contribution is to show that a variety of players contested austerity and their interactions came to shape the contentious responses to it. Each country has a distinct configuration of relations between institutional and non-institutional players that explains the different outcomes.

Building upon the considerations outlined in this introduction, chapter one ("Cycles, Arenas and Claims") presents the analytical framework deployed throughout the empirical chapters. I explore conceptually how to analyse the plurality of claims and players that developed throughout a cycle of protest and how these are essential for our understanding of how broader political arenas are re-shaped. I also explore how concepts such as cycles of protest, players and arenas, repertoires and claim-making developed in social movements studies. *Contesting Austerity* differs from more conventional approaches to social movements by analysing contentious reactions to austerity as part of an arena characterised by the dynamic interaction of a plurality of players – including parties, unions, and the state. At the end of the chapter, I present this investigation's research design and methodology. Based on a paired comparison and process tracing, the extensive data collection allows for thick description (i.e. grasping various dimensions of social reality in detail), and involved a detailed reconstruction of the case countries' respective contentious dynamics, based on an

unprecedented protest event analysis database (over 4,500 events coded for the two countries) and on 44 interviews conducted by the author. The detailed description in terms of players, claims and repertoires allows for a full picture of mobilisation in the period under analysis.

In the subsequent chapters, this book follows the different phases of the cycle of protest in the two countries between 2008 to 2015. As we will see, at each phase of the cycle new claims, discourses, players and alliances emerged. As the cycle unfolded, the protest arena was reconfigured not only by the specificity of opportunity structures, but also by interactions between players.

Chapter two ("Preludes to the Anti-austerity Mobilisations") reconstructs the dynamics of mobilisation in Portugal and Spain from the transition to democracy to the austerity years. It is argued that rather than being spontaneous reactions to political and economic crises, many of the features identified throughout the following chapters were already present and were important in shaping the configuration of discourses and players during the austerity years. In Portugal, the principal conflict was centred around labour issues with protest dynamics dominated by trade unions. Movement players remained small, closed and conflictual, with a strong presence of political parties among them, and with small, reactive and more disruptive local movements emerging in response to changes in the welfare state. In Spain, the autonomy of social movements in relation to political parties and trade unions led to more open and horizontal repertoires, in which movements, in addition to focusing on labour precarity, also developed a critique of democratic institutions, later transferred to the 15M.

The next two chapters deal with different aspects of what I call mobilisations under and against austerity. These comprise two moments, involving different players and discourses, between 2010 and 2014. In the first phase, centred on 2011, which I have called "Turning Points" (the title of chapter three), we see a redefinition of the contentious arena, with the emergence of social movements directly contesting austerity. These brought new dynamics and claims into the political sphere of both countries. Nevertheless, after this turning point, the two countries follow different paths: in Spain there was a crescendo of mobilisations, with social movements becoming dominant, while in Portugal social movements never became leading players and emerged only within particular political opportunity structures. This reflected the capacity of social movements in Spain to go beyond their core of activists, while in Portugal the movements proved much less capable of doing so. Apart from the past trajectory of protests, this divergence relates not only to different conjunctural and contextual opportunities, but also

to the different capacities of emergent movements to establish an open and broad discursive repertoire and effective structures of mobilisation, penetrated to varying degrees by established institutional players.

However, this divergence does not paint a complete picture of the anti-austerity dynamics in the two countries. To account for the full cycle, other mobilisations must be taken into consideration. Thus, in chapter four ("Enduring Austerity") I deal with protest dynamics between 2012 and the end of 2013, during which new players and claims materialised. In Spain, multiple and overlapping dynamics developed, whereby the demand for social rights to education and health triggered an alliance between social movements and trade unions. In Portugal, by contrast, trade unions and political parties dominated street mobilisations. If trade unions were the main player, the re-emergence of social movements gave rise to a strategic alliance and the co-optation of these movements by political parties. Rather than developing a discourse critical of the regime, as occurred in Spain, mobilisations in Portugal were characterised by demands to protect the legacy of the 1974 revolution. Together, these two chapters advance a critique of the sole focus on social movement dynamics.

Lastly, chapter five ("From the Streets to Institutions") focuses on the dynamics within party systems – specifically in relation to the left-wing parties – as an outcome of the contentious cycle during the electoral period (2014-2015). While existing research has focused on the influence of the 15M mobilisations on the constitution of *Podemos* in Spain and the lack of a new party in Portugal, I show that these transformations do not result solely from the challenges introduced by the movements, but also from the internal dynamics of the institutional left. In this way, *Podemos* is the result of both social-movement dynamics and internal struggles within the pre-existing party *Izquierda Unida*. In Portugal, with the social movements domesticated and at the back of the stage, the debate on the left revolved around the unity of the left against austerity.

Portugal and Spain diverged in both the nature and intensity of the protests they experienced and the reconfiguration of the party system, a focus on which should help us to understand that the so-called anti-austerity protests cannot be treated as a single phenomenon despite their commonalities and linkages. When observing the political consequences of the Great Recession and austerity, we find different protest responses and outcomes in Portugal and Spain. We could expect the similar historical backgrounds of these semi-peripheral European countries – both of which underwent a rapid socio-economic transformation in the second half of the 20th century, and a transition to democracy followed by integration into European institutions

from the 1970s – to produce similar outcomes. Arguably, even if in a broader macro-historical perspective a certain parallel can still be observed – since both have gone through a crisis embedded in European dynamics – an in-depth analysis of the anti-austerity cycle reveals different trajectories. As I will show in the empirical chapters of this book, the shape of the cycle of protest was different in each case, and the lack of successful new political parties in Portugal contrasts with the plurality of electoral players that emerged in Spain.

Many seem to analyse the current epoch from an "end of history" perspective, whereby contention is disruptive of liberal democracies. But contention is no abnormality. Rather, it is at the very heart of processes of political change. Contention involves a range of actors that struggle to define meaning in the political sphere. The "turbulence" of the current period provides us with a valuable opportunity to examine these dynamics. By using a longitudinal cycle-based approach to analyse the dynamic configurations and reconfigurations of the political arena, I hope to contribute to our understanding of the intricate process of political change in the Iberian Peninsula – but also elsewhere – during the peak of austerity.

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