

The influence of the political attitudes of workers and the effect of the Great Recession on the decision to join a trade union in Southern Europe

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Abstract

One of the distinctive characteristics of the trade union model in Southern Europe is the clear political persuasion of the dominant confederations (mainly left-wing) and, with the exception of Italy, their low membership density. The Great Recession ushered in a period of confrontation between unions and governments over the application of austerity policies and radical reforms deregulating the labour market, creating a hostile environment for unions, which responded by intensifying their discourse and socio-political action in order to call for the support of workers and alliances with other left-wing organisations. This paper, based on data from the European Social Survey, analyses the importance of the political attitudes of workers as a determining factor of unionisation in Italy, Portugal and Spain over a significant period, from 2002 to 2018. The results obtained reveal an important influence of political attitudes on unionisation in Southern Europe, especially in Portugal. However, other variables also affected unionisation, notably the negative influence of precarious forms of employment and the conjunction of the recessionary economic cycle and neoliberal reforms that took place during the Great Recession.

Keywords

unionisation, political attitudes, Southern Europe, Great Recession, labour reforms.

Introduction

Trade unions in Europe have the highest levels of membership and the greatest representation and capacity to intermediate and conclude collective agreements in the

world. However, there has been a widespread decline in union representation over the last thirty years (Waddington, 2015; Gumbrell-McCormick and Hyman, 2013; Waddington et al., 1997, among others).

The study of this problem has led to analysing the factors that determine unionisation in order to find the reasons for the decline in the membership, representativeness and power, in general, of unions. The literature establishes that measuring union strength, that is, the degree of representation of the workforce, depends on the following variables: union density; composition of the union; unity; organisational concentration; centralisation; extension of collective bargaining; and representation in the workplace (Crouch, 2017; Martinez Lucio, 2017; Vandaele, 2019). Moreover, the unions obtain power and resources from their presence and political intermediation at the highest level (social concertation), influencing economic and labour policy. This entails a political dimension that has always been present in confederal unionism, with strategies for industrial and economic democracy (Gumbrell-McCormick and Hyman, 2019) and pronounced left-wing political affiliation, although not exclusively, as the Italian case shows. However, the literature shows that in recent decades class identities have weakened and the voting of workers is more fluid and less stable, blurring the traditional boundaries of the left-right spectrum (Trentini, 2022).

The countries analysed, Italy, Portugal and Spain, can be encompassed in a common and recognisable industrial relations system (Amable, 2003) and their union movements, of low membership density (except Italy), have large, highly politicised left-wing confederations (of remote and markedly political origins linked to specific political parties). These have the legal and organisational capacity to call general strikes (political by definition) and have considerable experience in social dialogue and political exchanges with governments and their employer counterparts.

Despite the political dimension and the capacity of mobilisation, unionisation continues to be the key factor as a source of power and finance. The fall in unionisation and union density limit union presence in the workplace and their capacity to exert pressure and negotiate in the institutions in these countries (Rigby and García Calavia, 2018: 141-142). However, the discourse and the political values of the unions are also an important influence on unionisation, and possibly more so in the countries analysed.

Different studies have analysed the predictors of unionisation in Europe (Checchi and Visser, 2005; Schnabel, 2013; Schnabel and Wagner, 2007, among others), encapsulated in the institutional and structural nature of employment, on the one hand, and the individual factors related to the worker, on the other. Among the latter, however, few studies have addressed the influence of political stance and attitudes on unionisation (Ebbinghaus, Gobel and Koos, 2011; Jensen, 2017; Kirmanoğlu and Başlevent, 2012; Trentini, 2022; Schnabel and Wagner, 2005). These studies have suggested a moderate importance or little relevance of left-wing political attitudes for unionisation. But none of these have analysed Southern Europe in comparative perspective, a region where the large union confederations register a higher level of politicisation and union competition, which also has its tradition and political and ideological connotations. Only the Italian case has been studied, and in isolation (Frangi and Barisione, 2015). The Great Recession and the economic policies focusing on austerity and the radical institutional reforms of deregulation introduced in Southern Europe created a context of debilitation to which the large unions responded by reinforcing their left-wing discourse and advocating political and social confrontation.

This paper examines whether left-wing political attitudes are an important determinant of unionisation in these countries during the period 2002-2018, taking into special consideration the impact of the Great Recession and the left-wing union response. Recessionary cycles in the economic sphere and neoliberal reforms and right-wing governments in the political sphere tend to have a negative impact on unionisation (Trentini, 2022). In order to examine the influence of political stance and attitudes on unionisation, this paper analyses the impact of this variable on unionisation in Italy, Portugal and Spain, on the basis of 9 rounds of the European Social Survey (2002-2018). The inclusion of 3 variables related to active employment and the fact that any response that does not include data or contains missing values is discarded ensures that the sample used is only comprised of responses from workers (in paid employment). This makes it possible to explore the relationship between workers and unionisation, as proposed in the title of the paper. The initial hypothesis, despite that indicated by the literature for other union models, expects a strong influence of left-wing political attitudes on unionisation. This presupposition is based on the peculiarities of the union model in these countries and their greater degree of politicisation, and the leftist tradition

of social democratic and communist origins of their large union confederations. The results obtained show an important influence of left-wing political attitudes on unionisation in Southern Europe, above all in Portugal. Furthermore, they show a general decline in unionisation from 2002 to 2018, which was intensified by the Great Recession. The unions' left-wing discourse and protests of a political nature vis-à-vis their governments were not effective in stopping this sharp decline, especially in Portugal and Italy.

The research is set in a theoretical framework that explores the literature on the determinants of unionisation and, among these, political attitudes in particular. Subsequently, the union models in the countries analysed are specified, focusing on membership, their evolution and the political persuasion of the dominant confederations. The data selected and the design of the research are subsequently explained. In the next section, the results obtained are presented. These are then discussed and incorporated into the literature in a further section. Finally, the conclusions of the paper are drawn.

The evolution of the determinants of unionisation in light of social and economic changes, and the importance of political attitudes

The literature has extensively analysed the determinants of unionisation, which may be encapsulated in the institutional and structural nature of employment, on the one hand, and the individual factors related to the worker, on the other hand. In recent decades there have been political and institutional changes, modifications to the production structure and working conditions, and also alterations in the ideological fidelity and sense of identity of workers with their unions that have had a negative impact on unionisation.

The institutional and structural factors that determine employment are as follows: business cycle, union model and the representation of workplace, type of contract, type of working day, occupation, sector and company size. First, growth cycles and the creation of employment favour union membership and even union density, and vice versa (Schnabel, 2013: 258). In the same vein, the political cycles of left-wing governments and social policies also favour unionisation; while on the contrary this is curbed by neoliberal policies and labour market reforms (Trentini, 2022). In general, the economic policy and labour market reforms implemented in Europe since the 1990s, the decade of the

Economic and Monetary Union, have favoured the flexibility and unilateralism of companies, while being unfavourable to unions and their intermediation in the labour market (Waddington, 2015). Unemployment has been considered as a negative factor except for exceptions such as the Ghent system (Checchi and Visser, 2005), reformed and weakened in the 1990s and 2000s, especially in the case of precarious workers and young people (Shin and Böckerman, 2019).

Institutionally, the best-known positive effect is the aforementioned Ghent system (Schnabel and Wagner, 2007), where trade unions provide unemployment benefits. This system is based on voluntary membership of a union-linked insurance fund. In the Nordic countries that apply this system, despite the liberalisation that allows private insurance, an extraordinary tradition prevails that identifies social protection with trade unions, with the consequent boost to unionisation and general support of workers. Collective agreements and worker representation in the workplace, which obviously differ from country to country, and individual employment contracts should also be taken into account with respect to the type of contract. As regards collective contracts, the extension of the coverage of collective agreements favours union power, but also the “free rider phenomenon”. Nevertheless, the capacity of a union to obtain a collective contract is, in general, perceived positively by workers and strengthens the organisation, and this usually entails a positive relationship with unionisation (Scheuer, 2011: 69). On the other hand, the study of the centralisation of the bargaining system has encountered contradictory and, at times, insignificant results depending on the countries and time periods analysed (Schnabel, 2013: 266). It is clear, on the contrary, that the presence of collective representation of workers in the workplace strongly favours unionisation (Ebbinghaus et al., 2011; Schnabel and Wagner, 2007; Waddington, 2015). The combination of high collective bargaining coverage and high centralisation, despite the “free rider” effect, and a high degree of representation in the workplace are elements that strengthen the unions and, therefore, favour unionisation (Checchi and Visser (2005). In general, the reforms that favoured the flexibility and unilateral power of companies limited collective bargaining and are directly related to the decline in unionisation since the 1980s and, above all, 1990s (Ebbinghaus and Visser, 1999; Waddington, 2015).

Standard employment (full-time employees with a permanent contract) favours unionisation, while atypical employment has a negative effect (Blanchflower, 2007;

Ebbinghaus et al., 2011). The segmentation of the labour market and a high rotation of workers also reduce unionisation (Jensen, 2020). Thus, precarious work is a strong driver of de-unionisation, since it affects peripheral workers or outsiders with less incentives to join unions (Kalleberg, 2009). Moreover, this adverse effect is multiplied in the case of the informal economy, relatively more extensive in the countries analysed in this paper than in the rest of Western Europe.

In line with the institutional changes indicated, events since the 1980s have verified a profound transformation of the productive fabric that favours private companies over public, the service sector rather than the industrial sector and a widespread reduction in company size and an increase in their dispersion, all of which discourages unionisation (Kollmeyer, 2021). Thus, company size has had a direct relationship (or positive relationship) with unionisation that is quite clear and robust. This effect is equally clear and verified in the public sector as in the private sector. Less clear and more contentious is the impact of the reduction of industrial employment and the expansion of the service sector, which also differs according to the countries analysed (Schnabel, 2013: 259). In this respect, the reduction of unionisation found in the service sector in some studies could respond to the smaller size of companies in this sector compared with the industrial sector (Scheuer, 2011).

The nature of the occupation in companies is a factor that is related to another of an individual nature: the level of training of employees. Workers in more intellectual or “white-collar” occupations, particularly jobs which require high qualifications, have usually maintained historically low levels of unionisation (Schnabel, 2013: 260). However, the literature has not found absolute and undisputed evidence in the countries analysed that manual workers are more likely to join a union (Scheuer, 2011: 71). This may mean that this occupational distinction has lost importance in recent years due to economic and production changes in more advanced countries.

The individual characteristics of workers, which, along with workplace characteristics, are considered to be the main explanatory variables of union membership, have not been unaffected by this process of economic, social and institutional transformation. The literature has also explored the variables that determine unionisation at individual level (education, age, gender and political stance). In general, these characteristics, which are significant for practically all European countries, were not relevant in the study of

Southern European countries by Schnabel and Wagner (2007). Educational level is an individual characteristic closely related to employment and type of contract, but does not coincide absolutely, as there are usually problems of adjustment between the qualifications of workers (labour supply) and jobs available (company demand for labour), above all in the countries analysed in this study. In the case of workers' qualifications, Brady (2007) found a direct relationship between education and training and unionisation which, nevertheless, has been qualified by other studies. Ebbinghaus et al. (2011: 111) have shown that medium-skilled professionals are the most likely to join a union, while unskilled (untrained and with only primary studies completed) and highly-qualified (university studies) employees are related to a lower level of unionisation.

With regard to age, the literature estimated an inverted U-shaped relationship between age and the inclination to unionise. In this sense, younger and older employees are less likely to join unions, while intermediate-aged employees show a higher propensity to unionise (Blanchflower, 2007; Schnabel, 2013). This negative effect is multiplied in countries with high levels of unemployment and precarity and low levels of education and training among young people (Ebbinghaus et al., 2011: 110).

Some research has suggested that women are less likely to join a union (Brady, 2007). However, this effect disappears when atypical work is controlled (Ebbinghaus et al., 2011). Likewise, transnational studies have shown that gender becomes statistically insignificant in most countries. In some cases, such as the Nordic countries, the unionisation rate of women is even higher than that of men, although in other countries such as Germany or Italy the unionisation rate of women is still lower than that of men (Schnabel, 2013: 261).

Generally speaking the labour supply has been transformed, with a higher level of education, yet it is also far less homogeneous. This heterogeneity and fragmentation of the labour market hampers the identification of common objectives and group and class identity (Gumbrell-McCormick and Hyman, 2013). In light of this heterogeneity of interests, left-wing attitudes and political identity had been a classic cohesive factor of unionisation, overriding the lack of rational interest that some groups or individuals could have, as indicated by Olson. In recent decades, a number of changes have been consolidated that have not only debilitated unions institutionally, they have also actively contributed to favouring mentalities and attitudes of individualisation among workers

and, consequently, undermine their collective identification with the working class and the unions politically aligned to the left (Kollmeyer, 2021; Waddington, 2015).

Politics, on the other hand, has lost ideological value, the boundaries between left and right have become blurred and the voting of workers is more fluid and less stable with regard to left-wing parties (Mosimann, Rennwald and Zimmermann, 2019). Social and economic changes and the transition towards post-industrial societies have altered workers' political attitudes and their motivations, and the same has occurred with some unions, which no longer adopt such a markedly left-wing stance. In this respect, a reduction in the importance of political reasons as a determinant of unionisation could be expected (Jensen, 2017: 383-384). In fact, in Sweden, according to Palm (2020), the influence of aspects such as class and ideology on unionisation is diminishing.

Nevertheless, it is also plausible to expect, to the contrary, the prevalence of the relationship between left-wing political attitudes and unionisation, given that the unions embody the collective voice of workers and intervene politically and economically in order to favour economic redistribution and social policies (Kollmeyer, 2013). Political ideals could explain confidence in the unions when the material interest of some workers in unions is weakened due to the structural and institutional changes and workforce transformations indicated (Frangi, Koos, Hadziabdic, 2017).

The countries analysed in this research have not been studied in this respect, despite having a union model that is much more influenced by political attitudes, especially left-wing. Studies undertaken in other countries with less politicised unionism have apparently found a direct relationship between unionisation and left-wing political attitudes, and an inverse relationship with a right-wing political stance. These, however, only have a moderate effect within the set of variables considered to be factors of union membership in some countries, although not in all (Ebbinghaus et al., 2011; Jensen 2017; Kirmanoğlu and Başlevent, 2012; Kollmeyer, 2013; Schnabel and Wagner, 2005; Trentini, 2022). A slightly more important effect has been found in the Italian case (Frangi and Barisione, 2015), suggesting that this factor may have greater importance in the Southern European union model, which tends to be very politicised with dominant left-wing confederations. A favourable attitude of the public towards strong unions is also directly related to a personal left-wing political orientation (Turner and D'Art, 2012). In the same regard, in recent years unions have continued to actively discourage voting for any far

right options in political elections in Western European countries, while this aversion is not the case for the entire workforce (Mosimann, Rennwald and Zimmermann, 2019).

Unionisation, political attitudes and unions in Southern Europe, and the impact of the Great Recession

The southern countries under analysis comprise the so-called Mediterranean model and have common features: low and secondary or precarious labour participation of women in general and young men, dualism (insiders/outsiders), a high level of employment protection (against dismissal) for insiders and a low level of unemployment protection, especially for outsiders (Amable, 2003). Regarding union intermediation and representation, this area has been characterised by a low level of union membership (except Italy) and a high level of collective bargaining coverage (Vandaele, 2019: 22), social dialogue and union fragmentation.

	UD		CBC	
	<u>2002-2008</u>	<u>2009-2017</u>	<u>2002-2008</u>	<u>2009-2017</u>
Italy	33.3	35.6	80	80
Portugal	21.0	17.8	81.2	75.6
Spain	16.5	17.2	77.5	78.1
Source: OECD/AIAS Database (2021)				

Union density has fallen moderately in Portugal, and has increased moderately in Spain and rather more notably in Italy. This would suggest that the Great Recession has only had a negative impact in Portugal. However, these relative increases in Italy and Spain may be due to a statistical effect derived from the greater stability of unionised employment in a context of significant and rapid job destruction at the start of the Great Recession (which reduced the reference population of employees) and slow recovery (scant job creation) from 2014.

More worrying is the fall in collective bargaining coverage, a key element of the union model in Portugal. Meanwhile, this remains stable in Italy, and practically the same in Spain. Extensive collective bargaining coverage, meanwhile, benefited historically from

statutory (state) extension mechanisms for agreements between unions and employers' organisations, representative of all the companies and workers of the area of negotiation, in Spain and Portugal. In the latter country, extension was under ministerial approval (not automatic), and suffered restrictions as a result of the unilateral reforms adopted in this country under pressure from the Troika, that is, the European Commission, the European Central Bank and the International Monetary Fund (2011-2014). In Italy, extensive coverage has been achieved through collective bargaining itself (Koukiadaki, Távora and Martínez Lucio, 2016: 20-21).

The trade union system is competitive. Historically, there has been a strong link between confederal unions and social democratic and communist parties. Since the 1970s, the literature has emphasised a weakening of the links between (especially left-wing) political parties and the unions. In general, left-wing parties have needed to seek a broader base than that provided by the unions in view of the decline of Fordism and the fall in union membership. In Italy, the crucial dates are the 1980s and, above all, the 1990s, when the large parties that were a point of reference for the left-wing confederal unions abandoned the Marxist tradition. *Partito Democratico della Sinistra* and, subsequently, *Partito Democratico* clearly moved their ideology and programmes towards the political centre, thereby weakening the historical links that tied them to the *Confederazione Generale Italiana del Lavoro* (CGIL). The crisis of the Italian political party system fractured Christian democracy, with part of this ideological group joining the *Partito Democrático*. There was a partial rupture of the relationship between *Democrazia Cristiana* and its corresponding union, the *Confederazione Italiana Sindacati Lavoratori* (CISL). Nonetheless, since the 1990s, a shift of CGIL towards the left and a drift of CISL to the right have both been verified (Ceron and Negri, 2017).

As well as the internal factors in Italy, the fall of the Berlin Wall also contributed to the weakening of these links in the three southern countries. The policy of social pacts ("supply-side corporatism") and the project of European construction, in which the unions also participate (although critically), moderated the unions' political agendas (Sánchez-Mosquera, 2018). However, the large union confederations have continued to identify with the political left.

Unionism in Southern Europe, more politicised than in other parts of Europe and with low union density, has been conceptualised as "unionism of activists" (Gumbrell-

McCormick and Hyman, 2013; Visser, 2011). The Spanish unions, for their part, gain legitimacy through union elections of representatives and works councils: this could therefore be characterised as a “unionism of voters” rather than a unionism of “members” (Martínez Lucio, 2017: 91). This unionism of activists, subject to periodic union elections, means that a solid and recognisable political discourse is an important element of internal cohesion for union officials in the two large Spanish confederations, *Comisiones Obreras* (CC.OO.) and *Unión General de Trabajadores* (UGT).

The Great Recession created an unfavourable economic context for unions, as the theory indicates (Frangi, Koos and Hadziabdic, 2017). On top of this, there were radical unilateral reforms undertaken by the governments of these three countries under pressure from the Troika, pressure directed towards Southern Europe in particular (Koukiadaki, Távora and Martínez Lucio, 2016). This was much more intense and prolonged in Portugal than in Spain and Italy, and in fact Italy only received pressure in the spring and summer of 2011 when public debt interest rocketed.

Despite some agreements being concluded, conflict and confrontation also prevailed in the legal sphere (Leonardi, 2016: 163). There was thus serious confrontation between unions and governments, the maximum expression of which was a series of general strikes, and there was also an intense social movement of indignation in the cases of Portugal and Spain, which was also directed at the European institutions that endorsed the austerity policies: the “12th March Movement” (“Geração à Rasca”) in Portugal and the 15th May movement (“15-M”) in Spain (Campos Lima and Martin Artiles, 2014: 139 and 144).

The literature has shown that the unions in Southern Europe have a moderately strong mobilisation capacity and that this frequently affects more than just their membership. This enabled them to use general strikes effectively to put pressure on their governments, as the Spanish case shows (Barranco and Molina, 2021: 1239). Recourse to general strikes intensified in all three countries during this period. The discontinuation of social concertation and government agreements, moreover, led the unions to reconsider their political stance and, not without a measure of distrust, they sought alliances in the so-called national political “mosaic left” or “mosaic of left-wing groups”. In Portugal, there were five general strikes in five years (2010-2014), which was the same number as there had been in the preceding 35 years (1974-2009). *Confederação Geral dos Trabalhadores*

Portugueses - Intersindical Nacional (CGTP-IN) and União Geral de Trabalhadores Portugueses (UGT-P) jointly called three general strikes (24 November 2010, 24 November 2011 and 27 June 2013), when there was only one precedent of a joint general strike, in 1988 (Campos Lima, 2015: 20). There were three general strikes in Spain: one in 2010 as a response to labour market reform, and two in 2012 against the prevailing economic policy and further labour market reform. Finally, there were three general strikes in Italy in 2009, 2011 and 2014, although not all unions were united behind them.

Neither the social protests backed by citizens nor the general strikes reversed the reforms in any of the three countries studied, but they did increase the politicisation of the union agenda and they also gave greater internationalist momentum to the radicalisation of social movements and left-wing parties, with different nuances in the Italian case. The protests in Southern Europe were strongly marked by a defence of a left-wing concept of the state's social role as protector, and by the notable participation of those affiliated to unions and young people in general (Campos Lima and Martín Artiles, 2014: 167). Consequently, the dominant confederal unions, mainly pertaining to the left, radicalised their discourse and stance.

Table 2. Members of the union confederations in thousands					
	2002	2010	2018	Difference in thousands 2010-2002	Difference in thousands 2018-2010
ITALY	<u>11,266</u>	<u>12,162.9</u>	<u>11,967.3</u>	<u>896.9</u>	<u>-195.6</u>
CGIL	5,461.2	5,748.3	5,686.2	287.1	-62.1
CISL	4,153.1	4,542.4	4,050.7	389.3	-491.7
UIL	1,651.7	1,872.2	2,230.4	220.5	358.2
PORTUGAL	<u>727</u>	<u>714.5</u>	<u>574.5</u>	<u>-12.5</u>	<u>-140</u>
CGTP-IN	500	500	400*	0	-100
UGT-P	213	200	160*	-13	-40
USI	14*	14.5	14.5	0.5	0
SPAIN	<u>2,360.8</u>	<u>2,989.7</u>	<u>2,408.9</u>	<u>628.9</u>	<u>-580.8</u>
CC OO	918.8	1160	900	241.2	-260
UGT	915.7	1209.7	880	294	-329.7
ELA-STV	97.2	108	115	10.8	7
USO	92.1	112	118.9	19.9	6.9
CSI-CSIF	237	300	295	63	-5
CGT	60	60	60	0	0
CIG	40	40	40	0	0

The calculation in Italy is completed with *Unione Generale del Lavoro* (UGL), whose data are not reliable, and other grassroots organisations that are independent of the large confederations. The number of members of unions affiliated to the confederations represented, after subtracting pensioners, students and the self-employed, is reduced to an average of 5,490.6 thousand for the first period, and an average of 6,045.3 thousand for the second.

Note: (*) Data immediately before or after the indicated date

Source: Visser (2019) ICTWSS database

In general, compared with 2002, the number of union members was still greater in 2010, undoubtedly due to the accumulative effect generated until 2008. However, the effect of the Great Recession that started in that same year, 2008, and the neoliberal reforms implemented from 2010 had a negative impact, causing a sharp fall in membership. The slow economic recovery initiated in 2014 did not reverse this negative trend. In the case of Portugal, the trend was always declining, but this regression accelerated from 2010. This would seem to point to the aforementioned statistical effect as explaining the increase in unionisation rates present in Table 1.

In recent years, the decline has been especially severe in the large left-wing confederations (CGIL, GTP-IN, UGT-P, CC OO and UGT), although the Italian CISL also suffered a sharp fall in members. This organisation has Christian Democratic roots, but it is favourable to social justice and could attract workers who consider themselves to be left-wing. However, the growth of *Unione Italiana del Lavoro* (UIL), moderately left-wing, has been notable. In the Italian case, it should also be noted that there is a high number of members who do not work, especially pensioners. These pensioners are approximately half of the total number of union members, thereby the number of members in the labour market (pensioners excluded) would be around 6.5 million, and not around 12 million. Moreover, fierce competition between unions exists within a much broader spectrum than the political left, including the large CISL confederation, and *Unione Generale del Lavoro* (UGL), founded in 1996 on the basis of the post-fascist unionism of the *Movimento Sociale Italiano*. There is also a whole range of "autonomous" or "extra-confederal" professional unions reasonably established in the banking sector, public services, education and transport; and there are also radically left-wing unions. Such plurality has been considered as the basis of the relative success of union membership in Italy in the context of Southern Europe (Leonardi, 2017: 86-87).

Data and design of the research

The aim of the study is to respond to the question of whether left-wing political attitudes are an important determinant of unionisation in these countries during the period 2002-2018, with special consideration of the impact of the Great Recession and the union response that accentuated left-wing discourse and pressure. To this end, it takes into account all available rounds of the European Social Survey (ESS)¹. This is a biennial cross-national survey of attitudes and behaviour established in 2001. The ESS uses cross-sectional, probability samples which are representative of all persons aged 15 and over resident within private households in each country. In total, 38 countries have taken part in at least one round of the ESS since its inception. To ensure comparability, all countries must use random probability sampling. The topics covered at least once by the ESS since its inception include media and social trust, politics, subjective well-being, gender, household, socio demographics, human values, immigration, health and care, economic morality, family, work and well-being, timing of life, personal and social well-being and welfare attitudes, among others.

The first 9 rounds have been taken into consideration together (2002-2018) and a dummy variable was introduced into the analysis for each of the years in which different rounds of the survey were conducted. Only the responses where there were no missing replies (or missing values) in relation to the selected variables, which are indicated below, were taken into account. This condition and the inclusion of 3 variables related to active employment ensures that the sample used is only comprised of responses from workers (in paid employment), thereby discarding those not working, such as students, the unemployed and retirees. In Spain, this entailed 6,702 responses (round 6 is not available because there were no replies for the dependent variable); and in Portugal it involved 6,045 responses. For Italy, however, rounds 3, 4, 5 and 7 are not available, with the result that the number of responses to hand for analysis was only 2,835. Consequently, the results for Italy will presumably be less robust.

The dependent variable of the study is unionisation, with data obtained from the question “Are you or have you ever been a member of a trade union?” (with three possible responses: “yes, currently”; “yes, previously”; and “no”). For this study these have been grouped into two: yes (“yes, currently”) and no (“yes, previously” and “no”).

The focal independent variable is political stance or attitude as the predictive factor of unionisation. This variable had eleven possible responses from 0 (far left) to 10 (far right). In order to simplify the model, these possible responses were reduced to five groups: far left (0, 1 and 2), left (3 and 4), centre (5), right (6 and 7) and far right (8, 9 and 10). A post-estimation adjusted Wald test indicated that this was the best recodification for this variable, since the estimated coefficients of the original model with eleven categories did not vary when these five categories were used. With sufficient observations, the political centre is considered to be the middle ground of the different response categories.

Other regressor variables have been developed in order to obtain a balanced and controlled set in accordance with the determinants of unionisation indicated by the literature and described in the theoretical framework, and these have been processed as indicated in Appendixes 1 and 2. There are two types of these control variables. Individual: age, gender and education; and employment: type of contract, type of working day, occupation, sector and company size. After running different models including different variables, the type of working day and occupation variables were discarded because they diminished the significance of the models. The age variable has only been estimated between 16 and 64 years. The education and sector variables have been recodified. The former progressively, from primary to higher education, and due to the few observations obtained ISCED level 4 has been removed. On the other hand, the sector variable has been limited to six industries: Agriculture, Construction, Mining, Industry, Private Services and Public Services.

It has not been possible to take into consideration union representation in the workplace variable, despite this being a strong determinant of unionisation, because it was only recorded directly in round 1 and indirectly in round 5. In order to study this variable beyond round 1 (2002) (Ebbinghaus et al., 2011; Schnabel and Wagner, 2007), other studies have had to use supplementary national data (Toubøl and Jensen, 2014).

In general, the set of rounds conducted increases the data available, thereby strengthening the analytical models developed, above all in the case of Italy. The sample obtained without missing values continues to be representative. For all the variables selected, the percentage of each of the categories of reply of all the responses (complete bases), and after the responses with missing values have been eliminated (bases used in

the paper), is similar (Appendix 2). Subsequently, each of the databases obtained has been weighted with weights provided by ESS.

The analysis starts from a descriptive study of unionisation data in accordance with the political stance of the respondent and moves on to a logistic regression analysis that builds a probabilistic model in order to determine the likelihood of union membership by using a reference category, that is, the effect of a change from the base categories to another status. By utilising odds ratios based on reference categories (base categories), it measures the change in the probability of membership when comparing subjects from different categories. In this way, odds ratios around 1 imply minor effects of the change in the probability of affiliation; values below 1 indicate a lower probability of affiliation and values over 1 indicate a higher probability of affiliation. The models have been constructed using the logit function included in the survey package in Stata software. A total of 3 logistic regression models have been developed, once each for the cases of Italy, Portugal and Spain.

Following the review of the literature undertaken in the previous section and the research design, the following hypothesis is proposed whose confirmation or refutation will make it possible to answer the research question that guides the study. Unionisation, negatively affected by the Great Recession, has a significant direct (positive) relationship with a left-wing political stance.

Findings

First of all, the descriptive results are presented, with a classification of the percentage of union membership according to the political attitudes of the respondents from two perspectives. Table 3 presents union members as a percentage of the total number of survey respondents in each of the five political attitude references. Table 4, complementarily, presents the results of the union-member respondents only, distributed among the five political options analysed.

		Far Left	Left	Centre	Right	Far Right
Italy	Union members	15	14	10	9	9
	Others	85	86	90	91	91
	Total	100	100	100	100	100

Portugal	Union members	10	7	5	7	6
	Others	90	93	95	93	94
	Total	100	100	100	100	100
Spain	Union members	12	10	7	7	6
	Others	88	90	93	93	94
	Total	100	100	100	100	100
Source: European Social Survey (Rounds 1-9)						

Examining Table 3, there is greater unionisation among survey respondents with a left-wing and, above all, far left political stance. With the exception of Portugal, a slight decrease from the centre to the far right can also be observed, with the likelihood to belong to a union diminishing as we move from left to right on the scale of political attitudes of the population.

	Far Left	Left	Centre	Right	Far Right	Total
Italy	20	28	21	17	13	100
Portugal	19	28	23	18	11	100
Spain	22	34	25	13	6	100
Source: European Social Survey (Rounds 1-9)						

On examining Table 4, it should be noted that in the sample (result of the surveys carried out) there is a general predominance, in this order, of the left, centre, far left, right and far right political options. The fact that the centre is the second most common category of political stance among union members, ahead of the far left, along with the fact that the right and far right categories account for 30% of members in Italy and Portugal, could suggest a moderate impact of left-wing political attitudes. In the Spanish case, meanwhile, a notable negative propensity to unionise can be observed among the right and, above all, far right categories.

Nonetheless, Tables 3 and 4 cannot approximate the degree of individual conditioning that political stance has on union membership. The logistic regression incorporates a more analytical perspective. The study undertaken takes into account a series of reference base categories for the variables studied, chosen according to their greater capacity to predict unionisation according to the literature: male, far left, 2002, educational level ISCED 3, permanent contract, company size more than 500 employees

and public service. The odds ratios indicate the increasing or decreasing likelihood of unionisation of a category of the same variable with respect to its base or reference category (Table 5).

Table 5: Odds ratios. Logistic regression models							
Independent variables	Ref. category	ITALY		PORTUGAL		SPAIN	
		Odds ratio	Sig. Level	Odds ratio	Sig. Level	Odds ratio	Sig. Level
Age		1.2216	***	1.1910	***	1.2094	***
Age squared		0.9977	***	0.9980	***	0.9980	***
Female	Male	0.6011	***	0.7554	***	0.7068	***
Left	Far Left	0.7633	*	0.5851	**	0.7859	*
Centre		0.7252	n.s.	0.4121	***	0.5424	***
Right		0.6111	**	0.5139	***	0.6396	***
Far Right		0.6628	***	0.4662	**	0.6030	***
2004	2002	0.7485	***	0.9409	n.s.	0.8624	***
2006		(omitted)		0.6453	***	0.9558	*
2008		(omitted)		0.6588	***	0.8433	***
2010		(omitted)		0.4241	***	0.9280	**
2012		0.7135	***	0.3935	***	(omitted)	
2014		(omitted)		0.4455	***	0.8167	***
2016		0.4603	***	0.3443	***	0.7417	***
2018		0.5507	***	0.5184	**	0.8621	n.s.
ISCED 1	Education level ISCED 3	1.1369	n.s.	0.5857	**	0.9032	n.s.
ISCED 2		0.9164	n.s.	0.7011	*	1.0043	n.s.
ISCED 5-6		1.2019	n.s.	2.0776	***	0.8365	n.s.
Fix-term contract	Permanent contract	0.5356	**	0.3448	***	0.5060	***
No contract		0.1877	***	0.4515	*	0.1990	**
<10	Number of workers >500	0.2224	***	0.5318	*	0.3343	***
10-24		0.3419	***	0.6587	n.s.	0.5582	***
25-99		0.6948	*	0.9878	n.s.	0.6970	**
100-499		0.9507	n.s.	0.8137	n.s.	0.8337	n.s.
Agriculture	Public services	1.0263	n.s.	0.0666	***	0.2620	***
Construction		0.6398	n.s.	0.1428	***	0.3027	***
Industry		0.4330	***	0.4289	***	0.4436	***
Mining		0.8092	n.s.	1.1422	n.s.	1.3895	n.s.
Private services		0.5981	***	0.4685	***	0.4722	***
Constant		0.0333	***	0.0333	***	0.0193	***
Observations		2,835		6,045		6,702	
Goodness of fit		F(9.267)	7.12	F(9.375)	1.37	F(9.385)	1.57
		Prob>F	0.0000	Prob>F	0.1981	Prob>F	0.1233
<i>Significance levels: *p<0.05, **p<0.01, ***p<0.001, n.s. not significant</i>							
Source: European Social Survey (Rounds 1-9)							

As expected, the models of Portugal and Spain estimate much better than that of Italy, which is based on a much smaller number of responses, and therefore the results must be treated with greater caution. The analysis of the logistic regression indicates a significant far left influence on unionisation, greater than in the case of other political attitudes. This points to a verification of the initial hypothesis. However, having a far left political stance is a much more decisive factor in Portugal than in Spain or Italy.

The dummy variable indicates that the greatest probability of unionisation was in 2002. This points to a general and widespread decline in unionisation, more pronounced in Portugal and Italy, throughout the whole period analysed, and not only during the Great Recession. Nonetheless, the reduction in the likelihood of unionisation over time is sharper when it coincides with the years of the Great Recession, centre-right governments, the pressure of the Troika and neoliberal-style reforms until 2016, which marks the lowest probability of the series.

Other variables have had a greater impact on unionisation than political attitudes, given that more extreme significant relationships are produced between their categories. One is type of contract, with less likelihood of unionisation for the category of temporary contract and even less for workers in the informal economy (no contract). The sector variable also has a notable importance in favour of the base category public services, only exceeded by the mining sector in Italia. There is less difference between private services and industry, a result that will be discussed below. In the same vein, company size has a direct and increasing influence on the probability of unionisation, with the exception of the scant significance of this variable in Portugal. Gender also has an evident impact, with women less likely to join a union, a tendency that is much more pronounced in Italy. Age is of growing importance, but the age-squared variable indicates that at some stage in the working life there is a regression in the likelihood of unionisation, which could point to the inverted U-shaped behaviour referred to in the literature. The educational level variable appears to be less significant, except in Portugal. The level of education has a direct and increasing relationship with unionisation in this country.

However, the results need to be discussed in order to better understand the importance and evolution of workers' political attitudes in relation to unionisation in the countries examined.

Discussing the importance of political attitudes in relation to unionisation in Southern Europe

Overall, the results obtained are consistent with the literature. The cross-national study undertaken by Ebbinghaus, Gobel and Koos (2011: 118) had found a significant but moderate relationship in the 18 European countries analysed. Unionised workers consider themselves to hold, and are characterised by, left-wing political attitudes, something confirmed for Germany (Schnabel and Wagner, 2005) and more recently for the United Kingdom with a moderate effect (Trentini, 2022) and the Nordic countries, where it is even possible to detect a special influence among the far left (Jensen. 2017; Palm. 2020). These results are in opposition to the lack of significance of political attitudes and other individual variables encountered by Schnabel and Wagner (2007) for Southern European countries. However, this research shows that a left-wing political stance is significant and has a positive influence on unionisation in these countries, above all in Portugal. Thus, the fact that unionism in the countries analysed has or has had greater political importance (dominant left-wing confederations with historical roots related to communism and social democracy), a great capacity to mobilise (strikes and demonstrations) and, in general, lower union membership corresponds with this notable influence of left-wing political attitudes on unionisation.

Regarding the predictive weight of political attitudes compared with the other control variables, type of contract, sector and company size all have more importance in Southern Europe. However, the sector variable is only related to real differences in the case of public services, which significantly favour unionisation compared with other categories. There is no notable difference between industry and private services. Nevertheless, company size is a decisive factor with a direct and positive relationship with unionisation. These results are consistent with the lack of predictive clarity of the sector found by Schnabel (2013) and the considerable importance of company size as a determinant of unionisation demonstrated by Scheuer (2011). Only the educational level, with the exception of Portugal, has shown a lesser influence than political stance. In this case, the result is consistent with Brady (2007), but not with Ebbinghaus et al. (2011: 111), who had indicated the greater influence of medium levels of education.

The negative effect of informal (no contract) and temporary employment, as indicated by the literature, and as was to be expected, affects unionisation very negatively in these countries. Being a woman has a negative effect in this respect, and the age variable explains the lower affiliation levels among young people. This can be related to the high degree of precarity that women and young workers in general suffer in these countries, and this is precisely one of the characteristics of this model of capitalism (Amable, 2003).

The results for Italy are not in opposition to Frangi and Barisione (2015), who, based on data from surveys carried out in this country, found an influence of left-wing political attitudes on union membership, but this only became important if it was combined with survey respondents having a high level of interest in politics. Certainly, the data available for Italy are less robust, due to the absence of certain rounds (3, 4, 5 and 7). The impact of the Great Recession hit the large CGIL and CISL confederations especially hard (Table 2), and their appeal to left-wing values and discourse did not stem the loss of members. The broad range and variety of political options associated with unionisation has been indicated as an explanatory factor of the country's relatively greater union membership and density (Leonardi, 2017). The options range from the left represented by CGIL to the right represented by UGL. Moreover, around one third of Italian unionists belong to CISL. This confederation may encompass members who, deeming this association as representative of unions that wish to promote social justice and protect jobs, consider themselves to be left-wing, while at the same time including others of the political centre or right due to the organisation's defence of Catholic principles. The Italian data shows a notable growth of the third confederal option, UIL, which represents the moderate left.

On the other hand, unionisation of women emerges as a factor that Italian unions should take into account. This is in opposition to what was observed by Ebbinghaus et al. (2011) about the low significance of this variable. The negative predictive value of female employees for unionisation compared with men is much more conspicuous in Italy than in Portugal and Spain, despite having similar traditions and culture.

In Portugal, the predictive value of left-wing attitudes for unionisation has been higher than in the other countries. The explanation provided here is that the reduction in union membership has led to an overall shift in favour of unionised workers who identify with the left, who are those that have maintained their membership, much as has been pointed out for the Nordic case since the 1990s (Jensen, 2017: 392). This adjustment

experienced by Portuguese unionisation has affected the large left-wing confederations above all (Table 2). These unions suffered serious decline after the Great Recession until 2016 (with a probability of unionisation of 0.3443 in this year, that is, 75% less than in 2002). The Portuguese case, therefore, seems to have reinforced the trait of “unionism of activists” that some authors have described for Southern Europe (Gumbrell-McCormick and Hyman, 2013; Visser, 2011). For this type of unionism, it is essential to develop strategies of alliance with social movements and citizens, as occurred in the protests that took place against the unilateral reforms introduced during the Great Recession. Left-wing attitudes, including far left, the defence of the public sector and the protection of jobs (Campos Lima and Martín Artiles, 2014) have been factors upon which these alliances have been formed, and which augment the strength and power of Portuguese unionism. In fact, this strong movement of spirited activism and the greater presence of unionists in these protests may well have favoured the arrival of a progressive government in 2015 (Campos Lima and Martín Artiles, 2018: 212). This government had success and proved to be durable against the odds and this evidently favoured left-wing confederal unionism. This may be reflected in the increase in the likelihood of unionisation between 2016 and 2018. However, overall, the membership base of the large Portuguese union confederations has been limited, with these organisations more reliant on political work in the institutions, and with a smaller and more politically driven unionisation.

In the Spanish case, political stance has been a factor of unionisation, with a notable proclivity towards far left attitudes and with an almost perfect probabilistic ranking from the far left to the far right. The Great Recession and the reforms implemented limited the militancy of the large left-wing confederations (Table 2). Nevertheless, the regression experienced with respect to the starting point in 2002 is far less severe than in Italy and Portugal (Table 5). This suggests a more moderate impact of the Great Recession and its associated reforms, compared to Portugal, and greater union resilience in general. However, the presence of unionists in the citizen demonstrations and protests was lower than that recorded in Portugal (Campos Lima and Martín Artiles, 2018: 212-213), and employee representation in companies has also been weakened, which is the centre of their power (Martínez Lucio, 2017: 91). The two large left-wing confederations accounted for 76% of union representatives in companies in 2007 (Sánchez-Mosquera, 2018: 29), while by 2019 their joint representation had fallen to 67.4%². Political strategies of

strengthening left-wing discourse and alliance with social movements and the “mosaic of left-wing groups”, including a return to the socio-political origins of the organisations (Pérez de Guzmán, Roca and Díaz-Parra. 2016), could lead to an increase in political power resources. However, they have not proved to be effective in driving strong growth in membership or in employee representation in the tough context of the Great Recession, although they have been able to limit its effects compared with what has occurred in Portugal and Italy. In this respect, in the Spanish labour market, which is markedly dual, there is a notable disconnection between outsiders or precarious workers and the unions.

Overall, as other studies have shown indirectly (Mosimann, Rennwald and Zimmermann, 2019) and directly (Schnabel and Wagner, 2005), left-wing attitudes are predictors of unionisation, and even serve as important barriers to right-wing attitudes among workers. However, the unions have little capacity to directly influence the political stance of workers in order to make them sympathise more with left-wing attitudes especially in the difficult times of economic recession and right-wing political cycles, and at a time that also includes the rise of right-wing populism in the countries analysed. Developing a clear and concise left-wing discourse, establishing social alliances and left-wing policies may favour union cohesion and identity, which could ensure a core of workers, including union officials and leaders, who are fully committed and who are all “activists”, prepared to address the hard times of economic recession and neoliberal reforms, but this is not likely to help stop the decline of unionisation.

Conclusions

The influence of political attitudes on unionisation in Southern European countries is higher than the literature has shown in transnational studies of Western European and Nordic countries. A left-wing political stance has a significant and positive impact in these countries, most notably in Portugal. Despite the lesser consistency of the data, the results for Italy are consistent with a prior study on this country based on other sources.

However, there are job-related variables (type of employment contract, sector and company size) and other individual variables (gender) in the majority of cases that also have an important impact on the probabilities of unionisation in these countries. These variables show the direct and positive relationship with unionisation of standard employment (indefinite contract), public services, male employees and larger company

size. On the contrary, unionisation is negatively related to precarious work, the informal economy and small and micro companies. Young people and women also have a negative relationship with unionisation.

The Great Recession had a negative impact on unionisation, although the trend was already declining beforehand. The recessionary economic cycle added to the political cycle of neoliberal reforms under the auspices of the Troika particularly damaged unionisation in Portugal, where the economic crisis and institutional reforms had a greater intensity. Unionisation showed greater resilience in Spain, also it also declined there. In general, a reinforcement of left-wing political discourse and the greater socio-political activism of the large general confederations of these countries in the form of (political) general strikes and demonstrations were unable to counteract the adverse effects of the economic and political cycle, which seem to have abated by 2018 and which need to be monitored and analysed in the future.

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Notes

1. European Social Survey. <https://www.europeansocialsurvey.org>
2. Gaceta Sindical. No. 432. junio 2020

Appendix 1. Variables and recodification description

Dependent variable	Unionisation	Binary: 1 if currently member of a union, 0 otherwise
Individual characteristics	Age	Continuous: 16-64
	Sex	Binary: 1 if woman, 0 if man
	Educational	Categorical variable with four categories: ISCED 0-1, ISCED 2, ISCED 3, ISCED 5-6 (ISCED 4 excluded) has been replaced by dummy variables for each category. Data for ESS 2012, 2014, 2016 and 2018 have been converted from ISCED 2011 to the 1997 edition. See https://ec.europa.eu/eurostat/statistics-explained/index.php/International_Standard_Classification_of_Education_(ISCED) (consulted on 10 December 2020).
	Political stance	Categorical variable with five different categories far left (0, 1 and 2), left (3 and 4), centre (5), right (6, and 7) and far right (8, 9 and 10) has been replaced by dummy variables for each category
Establishment characteristics	Size	A categorical variable was created to define five different categories according to the number of employees: less than 10 employees; from 10 to 24; from 25 to 99; from 100 to 499; more than 500 employees in the establishment. This has been converted into dummy variables for each category.
	Sector	Categorical variable accounting for the sector of activity of the establishment: Agriculture (1-3); Mining and Quarrying and Energy and Water supply (4-8); Industry and Manufacturing (9-30 in rounds 1-4; 9-31 in rounds 5-9); Construction (34 in rounds 1-4; 38-40 in rounds 5-9); Private Services and Sales including other activities not included in the previous categories (35-51 and 55-60 in rounds 1-4; 41-73 and 79-88 in rounds 5-9); Public and Community Services (31-33 and 52-54 in rounds 1-4; 32-37 and 74-78 in rounds 5-9). This has been converted into dummy variables for each category.

Working position characteristics	Type of contract	Categorical variable with three categories of workers in paid work: Permanent contract, Fixed-term contract, No contract (informal economy) has been replaced by dummy variables for each category.
Time	Year	Categorical variable that accounts for the year when the round of the survey was conducted has been replaced by dummy variables for each category.

Appendix 2. Comparison of percentages of the responses with and without missing values (NA) for each of the categories and countries

	ITALY		PORTUGAL		SPAIN	
	Database with NA	Database without NA	Database with NA	Database without NA	Database with NA	Database without NA
Type of contract						
Permanent	74.53	71.38	69.08	67.76	63.30	60.91
Temporary	18.27	21.20	16.96	21.52	28.92	32.42
No contract	7.20	7.42	13.96	10.73	7.79	6.66
Age						
Gender						
Male	47.90	48.73	40.36	41.45	48.56	49.29
Female	52.10	51.27	59.64	58.55	51.44	50.71
Education						
ISCED 0-1	16.48	6.83	53.53	40.18	33.47	20.94
ISCED 2	30.24	31.28	16.10	20.02	26.76	31.62
ISCED 3	39.37	46.29	16.91	22.72	17.13	20.65
ISCED 5-6	13.92	15.60	13.47	17.07	22.64	26.78
Sector						
Agriculture	6.36	5.06	6.55	3.38	8.82	6.32
Mining	0.32	0.24	0.35	0.20	0.46	0.32
Construction	6.65	6.51	7.40	7.62	9.16	9.36
Industry	17.92	16.22	20.98	19.64	14.99	13.06
Private services	46.96	50.47	43.54	46.37	48.09	50.97
Public services	21.79	21.50	21.18	22.79	18.48	19.97
Size of firm						
Less than 10 employees	48.69	49.91	47.17	45.14	47.85	46.70
Between 10 and 24	16.15	15.77	18.61	19.96	18.93	20.06
Between 25 and 99	14.99	15.19	17.75	18.62	17.41	17.44

Between 100 and 499	9.63	9.30	10.59	10.66	9.19	9.19
500 or more	10.54	9.83	5.88	5.62	6.61	6.61
Political stance						
Far left	15.39	14.98	13.07	13.52	16.14	17.30
Left	22.40	23.18	25.63	26.84	28.14	29.16
Centre	24.30	24.82	30.19	31.13	31.08	31.45
Right	21.34	21.08	17.78	17.10	16.06	14.90
Far right	16.57	15.93	13.32	11.42	8.58	7.19
Unionisation						
No and yes, previously	90.41	88.73	93.76	91.70	92.08	90.24
Yes, currently	9.59	11.27	6.24	8.30	7.92	9.76

Note: Figures for all variables are in percentages. In the Age variable all those under 16 or over 64 have been removed (10,975 responses), and age was not divided into categories. The responses of educational level OTHERS have been removed (51). The responses of educational level ISCED 4 have also been removed (1,267 responses), because this educational level is only adequately represented for Spain.

Source: European Social Survey, 2002-2018

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