



Austerity and Anti-Systemic Protest: Bringing Hardships Back In

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Abstract

This article explores the relationship between hardships and protest in the world-system. Despite the history of discussion of anti-systemic protest, there has been little work that differentiates world-systems contributions to social movement research from others who examine social movements. We contribute to a theory of anti-systemic protest by re-introducing hardships as a crucial element that defines inequalities in the world-system; one consistent source of those hardships are austerity policies imposed in response to debt negotiations. In addition to our path analyses which demonstrate the clear link of hardships and protest, our case studies provide further historical analysis on when globalization, political openings, and long-term hardships also help explain the occasion of protest.

Keywords: anti-systemic, hardship, protest



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How can we understand varied protest responses to similar material hardships? Has world-systems analysis sufficiently examined social movement action responding to neoliberal policies? This article seeks to answer these questions using a cross-national comparison of anti-austerity protest in Latin America. Our argument builds on previous work examining the role austerity policies played in generating protest globally (Shefner and Stewart 2011; Almeida 2007; Shefner, Pasdirtz, and Blad 2006; Walton and Ragin 1990). The purpose of this article is also to further discuss the role of hardships in protest activity while pushing followers of the world-system perspective to more precisely articulate a world-system theory of social movements and its relationship to anti-systemic protest. We find that there are different *paths to protest* in different countries but the path to anti-systemic protest in all countries always includes hardship.

Not all social movement research must take material hardships into account. Rather than responding to material hardships, many movements emerge out of their interpretations of injustice or other political or social grievances. Our call to more precisely articulate a world-system theory of social movements is driven by foundational characteristics of the world-system – the system is defined by inequalities in economic and political power across nations and regions. World-system differences are then manifested in the material hardships suffered by people differentiated by region and class. Thus, we believe that any world-systems informed theory of social movements must take into account material hardships stemming from the inequalities and injustices endemic to contemporary moments of the world-system.

This is not a common focus in world-system research on social movements. Rather than focus on how movements were generated in response to exacerbated hardships, much of the focus is how movements reflected change within the world-system (Arrighi, Hopkins, and Wallerstein 1989), and how those movements demanded “greater democracy and greater equality in the world” (Amin, Arrighi, Frank, and Wallerstein 1990: 10). We agree with the world-systems perspective that the importance of these movements is as a lever for transformation, but we find equally important the question of why such movements emerge. We believe one key is the hardships suffered by protesters and the communities they represent. Our approach allows us to re-focus on protest itself, and how world-system driven hardships and inequalities help explain protest. The anti-systemic nature of austerity protest helps us understand in a more nuanced fashion how anti-systemic movements are generated. Up to now, much of the world-system perspective on anti-systemic movements has been linked to the preoccupation with cycles of change within the world-system, including long cycles of shifting hegemony. We add the understanding that movements cannot be sustained without protest (Piven and Cloward 1977), and protests against the world system cannot be understood without examining hardships created by short-term economic changes.

There are exceptions to the unwillingness to examine material hardships. One important exception is the work of Rory McVeigh (2009), who despite his ongoing use of the term grievance, hews much closer to our material focus than the ideational focus found in social movement framing research. Another important exception is Booth, Wade and Walker (2010), who argue (along similar lines to that of Shefner and Stewart 2011) that short, sharp decreases in living standards for certain social groups frequently lead to mobilization. According to Booth et al. “there is an important link between *becoming* impoverished and popular unrest” (2010: 17).

Perception of threat also structures social movement action. For example, writing within the political opportunity structure (POS) tradition, Almeida seeks to understand how threats, as opposed to opportunities, help us understand level and form of protest. Almeida considers threat “the probability that existing benefits will be taken away or new harms inflicted if challenging groups fail to act collectively” (Almeida 2003: 347). Like much POS literature, this wide concept includes “fear of losing current goods, rights, and safety” and is generated by any number of short-term political shifts. In contrast to this contribution that continues to focus on the interpretation process, we focus on hardships as clear and material protest spurs driven specifically by demands of the global political economy. Almeida pushes the POS paradigm to understand how threat changes political opportunities. This is an important project, but we are not focused here on how threats turn into collective action, but how a changed political economic environment makes life more tenuous in tangible material terms.

Dixon and Martin (2012) similarly seek to integrate threat into political opportunity theory. Threat here is seen as “state repression . . . and other actions by political elites or opponents that are counter to activist groups’ interests” (Dixon and Martin 2012: 949), and how they encourage mobilization of coalitions. Austerity protests are often coalitionary efforts, because a large proportion of national populations are demonstrably affected and subsequently mobilize and work in common cause. Yet here too, much of the examination, useful as it is, is on the political, legal, and institutional environment in which these actors circulate, as opposed to our issue of interest: how negative shifts of economic well-being influence protest.

Van Dyke and Soule (2002) are closer to our argument in their focus on the moment of mobilization. Like us, Van Dyke and Soule look back to those contributions lost when strain theory (Smelser 1962; Kornhauser 1959) was discarded, specifically the impacts upon movements of macro-structural economic change. We seek to move further, however, in addressing not only reactionary movements, but movements that are mobilized to specific protest actions by clearly tangible material hardships, not perceptions of impending or current grievances suggested by economic changes. Van Dyke and Soule write: “a group may feel threatened when its members perceive that social forces are developing in a way that will prevent them from realizing their interests . . . groups may mobilize in response to a threatened loss of

economic resources and/or political power” (2002: 499). This paper provides a different focus: we rely neither on perceptions nor only on movement formation. We use as a basis for our theorizing the real moments of people hitting the streets in protest against genuine changes in their material wellbeing, demonstrating that people experience more than threat, but engage in forceful responses to clearly imposed policy that reinforces world-system inequalities.

Finally, Hetland and Goodwin (2013) make the point that the social movement literature must better examine how capitalism affects movements, “sometimes constraining and sometimes inciting or enabling collective action” (2013: 85). For them, capitalist controlled institutions are often the “source or target of popular grievances . . . (which) . . . shape collective identities and solidarities” as well as distribute resources, create reasons to coalesce with or oppose others, in indirect and direct, short-term and long-term ways” (2013: 86). We, of course, agree and heartily endorse the integration of a political economy perspective to understand protest. But where Hetland and Goodwin pose a variety of ways that an analysis of capitalism furthers study of social movements, we are most interested in a world-systems linked theory that helps us understand how long-standing inequalities and short-term, policy-imposed, hardships interact to help us understand how and why protest occurs in certain nations. These protests define a certain kind of collective action that responds to the deepening of world-system generated hardships. The dynamics of capitalism we are most interested in include the policies that diminish welfare state capacity and increase physical hardships on a majority of citizens through the mechanism of debt and austerity.

This article proceeds as follows: first we discuss what we mean by hardships, and why this fits austerity protests in Latin America. Then we briefly trace the disappearance of hardships from social movement theory. Next, we review how world-systems researchers have discussed social movements, and how we think our approach makes a contribution. After discussing our theory and methods, we examine our models, and discuss the results.

What’s a hardship, and why think of austerity in this way?

Shefner and Stewart (2011) trace their interest in hardships and their impact on protest to the “work of Piven and Cloward, who emphasize that the wellspring of mobilization is the daily, lived experiences of regular people” (1979: 21).” In that paper, the authors defined hardships as “the everyday, economic deprivations experienced by individuals and households” (Shefner and Stewart 2011: 358). Social movement theory has ignored hardships for decades, as we discuss briefly below. Important research has examined grievances, but much less has been done about those material injuries that precede the articulation as grievances – what we call hardships.

Austerity policies, one of the most visible manifestations of global neoliberalism since the late 1970s, provide a clear exemplar of hardships, as the following discussion makes clear. We focus on Latin America, although similar arguments could be made of nations across the globe, and find austerity at the root of a 35-year long wave of protest.

The recent history of austerity and subsequent protest in Latin America began as these nations increased their debt levels during the late 1960s and 1970s. The loans came due simultaneous with the recession of the late 1970s and early 1980s. With declining export prices, increasing oil prices, and rising interest rates, many indebted nations found themselves unable to pay their debts, and entered into debt renegotiations with the International Monetary Fund (IMF). Following free-market fundamentalism and arguing for reduction in state control of national economies, while attacking welfare state and protectionist legislation that restrained profit accumulation, the international financial institutions imposed a variety of conditions as consistent elements of debt renegotiations. These policies (variously entitled austerity, stabilization, structural adjustment policies, and even shock treatments) included currency devaluation, reduction of social welfare spending and consumer subsidies, and privatizing state-owned enterprises and services. Stabilization policies also facilitate foreign investment by cutting or freezing wages, increasing export production, and dismantling protectionist industrial and trade policies (Walton and Seddon 1994; Soederberg 2004; Harvey 2005; Babb 2005; Cypher and Delgado Wise 2011).

Although presented as short-term policy actions necessary during crises, austerity policies have extended over years, and resulted in substantial hardships across most of Latin America. Currency devaluation increased food costs, while wage freezes amid inflation further reduced buying power. Reductions in, or privatization of, public spending diminished the quality and quantity of education, health care, housing, and other services. The removal of subsidies on basic foodstuffs and transportation cut an already thin margin of survival. Rising interest rates increased debt among the middle class, forcing drops in employment. Shrinking government employment harmed workers from both the working and middle classes. Finally, increasing the market access of foreign business, coupled with cutting protection for domestic industry, hurt local businesses and further reduced employment (Stiglitz 2003; Portes and Hoffman 2003; McMichael 2004; SAPRIN 2004; Lara and López 2007; Anner 2011).

The imposition of such policies resulted in protests around the globe, lasting from the 1980s well into the new millennium (Walton and Ragin 1990; Walton and Seddon 1994; Auvinenen 1996; Stiglitz 2002; Almeida 2008). Shefner, Pasdirtz, and Blad (2006) found that external economic pressure explains protest in Mexico and Argentina, as does deteriorating social conditions driven by IMF pressure. Importantly, short-term austerity policies continued to impose hardships well after the ‘lost decade’ of the 1980s; the probability of any developing

nation being part of an IMF program actually increased from 22% prior to 1986 to 51% from 1986-1997 (Evrensel 2002).

These protests were first documented in the 1970s, and have occurred in both spontaneous and highly organized ways across the globe. Despite the global roots of deteriorating social conditions, protesters targeted states as the most readily available and attributable agent of such changes. Few social dynamics have proven to have as clear a trajectory as the imposition of austerity policies followed by protest. In Latin America, the protests often became institutionalized into movements; the Pink Tide of elected left-leaning governments were often the outcome of those movements (Burbach, Fox, and Fuentes 2013).

The Absence of Hardships

Because many movements respond in organized political ways to either newly imposed hardships, or hardships that are a legacy of inequalities built into social structure, we believe it is important to examine how hardships spur activity. For the most part, however, there has been little theoretical focus on hardships in social movement literature. Piven and Cloward's classic work highlights the importance of hardships, arguing that they provide the impetus to move from ordinary resistance to collective action, especially when “. . . economic change may be so jarring as to virtually destroy the structures and routines of daily life” (Piven and Cloward, 1979: 10). For Piven and Cloward, hardships generated by social structure provide the rationale for protest, yet few have carefully examined how hardships influence protest.

Functionalist theory provided the exception, suggesting hardships stemming from rapid social change could lead to social movement mobilization (Smelser 1962; Kornhauser 1959). For functionalists, hardships were important inasmuch as the stresses associated with rapid social change became articulated grievances, which functionalists mistakenly interpreted as expressions of psychological distress. Other analysts such as Davies (1969), Gurr (1970), and Pettigrew (1971), found hardships important merely as potential indicators of relative deprivation, the gap between what one perceives one has and should have. Grievances were treated as expressions of discontent, relegating the importance of hardships to their translation through perceptions.

Resource mobilization and political process theorists understood hardships as a manifestation of inequalities and conflicts of interest built into society (Tilly 1969, 1970, 1973, 1978; McCarthy and Zald 1973, 1977; Useem 1975; Jenkins and Perrow 1977; McAdam, McCarthy and Zald 1996; McAdam 1982). However, the wide and consistent presence of structurally rooted hardships signaled to theorists that grievances are ubiquitous and so analytically unimportant. Indeed, the closest that political process theorists came to addressing

systemic hardships was to echo previous recognitions that protest emerges with large-scale political and economic shifts (McAdam 1982; Tarrow 1998; Kitschelt 1986).

Framing analysis emphasized the cognitive and interpretive processes involved in the expression of grievances, while maintaining that objective material conditions are far less significant than socially constructed perceptions of them (Snow et al. 1986; Snow and Benford 1988, 1992; Gamson 1992; Gamson and Meyer 1996; Nepstad 1997). Similarly, New Social Movement theories emphasized the influence of grievances rooted in the shared, socially constructed identities of protesting groups. However, the NSM approach is paradoxical in its willingness to examine articulated grievances, while maintaining disinterest in hardships that may be generating those grievances (Melucci 1985, 1989; Touraine 1985; Cohen 1985).¹

The most recent theoretical contribution, contentious politics, widened researchers' analytic focus to encompass almost all things political. Yet these theorists too have failed to re-examine how the hardships people experience influence mobilization or outcomes (Aminzade et al. 2001; McAdam, Tarrow, and Tilly 1996, 1997, 2001; Tilly 1986, 1995; and Tarrow 1994, 1996a, 1996b). Across theoretical traditions, discussion of material hardships disappeared, as the concept moved from being key for strain theorists to a phantom presence in later analysis. Analyzing grievances and identity has been resurgent, but with little regard for what, for many movements, underlay these expressions of discontent – the objective material conditions of people's everyday lives.

We do not argue for a mechanistic relationship in which hardships invariably lead to protest. But we agree with McVeigh's (2009) suggestion that sources of contention – which he terms grievances, and we call hardships – are much more important than is given due. The model this article builds examines how hardships affect protest when hardship-driven collective action does occur. We bracket the process of interpretation in the effort to examine how hardships affect protest.

We suggest that hardships constitute the raw materials from which grievances *may or may not* emerge – again, we are not making a mechanistic and inevitable causal argument. Hardships are partially derived from longstanding systems of inequality, such as the disadvantages suffered by peripheral and semi-peripheral populations of the world-system, but they are not static. Just like political opportunities, levels of hardship fluctuate over time. The effect of contemporary shifts may add to or subtract from the historical legacy of political and economic domination suffered by a disadvantaged group within the world-system.

¹ For many New Social Movement theorists, protest struggles had moved beyond class to identity-based grievances, a position we find largely indefensible. Class and identity have always been interwoven, and class remains foundational to much protest.

The hardships imposed by decades of austerity policies were widely encompassing, leading to extensive social movement activity. But they cannot be fully separated from the hardships leveled by historic relationships of nations in the world-system. Economic disadvantages of poverty, inequality, and unequal terms of trade exist as a legacy and ongoing manifestation of peripheral and semi-peripheral status in the world-system. Peripheral and semi-peripheral nations have been subjected to the additional hardship-inducing economic pressures of debt and austerity. Hardships characterize many in the periphery and semi-periphery; any world-system informed theory of social movements, then, must take hardships and their fluctuations into account.

World-Systems Theory and Social Movements

Is there a world-systems theory of social movements? This probably seems like a foolish question given the focus on anti-systemic movements using a world-systems perspective (Arrighi, Hopkins, and Wallerstein 1989; Wallerstein 1984; Amin, Arrighi, Frank, and Wallerstein 1990; Grosfoguel and Cervantes-Rodríguez 2002; Silver 2003; Hall and Fenelon 2003; Reifer 2004; Smith and Wiest 2011; Moghadam 2012). As we look at the literature, however, perhaps it is not so foolish a question after all.

Champions of the perspective articulate their “search for the system-wide structural processes that have produced certain kinds of movements and which have simultaneously formed the constraints within which such movements have operated” (Arrighi, Hopkins, and Wallerstein 1989: 1). World-systems analysts do not examine all movements, but only those with anti-systemic implications. What constitutes anti-systemic? According to Wallerstein, to be anti-systemic is “to argue that neither liberty nor equality is possible under the existing system and that both are possible only in a transformed world” (Wallerstein 1990: 36).² This high bar is somewhat moderated by Wallerstein’s question of whether movement action has been able to narrow the gap in provision of services, income, and liberties between those in higher and lower societal groups.

Early anti-systemic movements were differentiated as ‘social movements,’ those clearly limited to addressing class inequality, and national movements, which ‘defined the oppression as that of one ethno-national group over another’ (Wallerstein 1984: 31). The experiences of earlier

² Specific movements include “socialist or labor movements, nationalist or national liberation movements, peasant movements, women’s movements, peace and ecology movements, even some religious movements” (Amin, Arrighi, Frank and Wallerstein 1990: 10), so long as they express anti-capitalist and anti-imperialist positions.

anti-systemic movements problematize the “unfulfilled revolution,” juxtaposing the incomplete economic justice of some national governments against the incomplete political justice of others. The dilemma of anti-systemic movements, both classic and more recent, revolves around the challenge of acting nationally against a world-system based oppression. The dilemma is manifest by movements’ relation to class struggle; such “struggle is traceable to a class situation (that is, a given relationship to the means of production) of the participants in the protest” and “the struggle derives from, or creates a counterposition between, groups differently related to the means of production” (Arrighi, Hopkins, and Wallerstein 1989: 63-64).

World-systems analyses logically generate interest in transnational movements. Smith and Wiest (2012) examine the transitions possible during crises; currently the crisis of interest is the decline of U.S. hegemony. Roots of the crisis lie in the dissolution of the bargains that nations made with middle- and working-classes, as neoliberal policies channel monies away from welfare state expenditures. Even though most of this protest activity targets national governments, Smith and Wiest argue that the logic against which movements contend “are likely to strengthen movements for changes in the larger world-system” (2012: 6).

Thus, world-systems research provides tools to think about anti-systemic movements and transnational movements. “But there is much to explain between large-scale global structures and the sort of radical changes in states and societies anticipated by world-systems analysis” (Smith and Wiest 2012: 21). In other words, is there a world-systems theory of protest movements, separate from the classic and recent discussions?

When world-systems researchers theorize non-national or non-labor instances of social movements, they often rely on discussions of political opportunity. Smith and Wiest’s recent book serves as an exemplar, as they discuss the existence of increasing political opportunities or decreasing constraints; the presence of organizations and material resources to “support popular mobilization”; and, the framing of claims and demands to important audiences (Smith and Wiest 2012: 21-22).

The best, most nuanced, and precise world-systems informed work on social movements is that of Beverly Silver on labor unrest (2003). In a comprehensive analysis carried out across time and space, Silver examines changing sources of worker power and the ongoing strength of strategic labor roles, while accounting for increased mobility of capital and the influence of post-Fordist production processes. Silver makes it clear that “the historical trajectory of labor movements . . . has shaped and been shaped by global politics – especially the dynamics of hegemony, rivalry, interstate conflict, and war” (2003: 7). We wholeheartedly agree, and emphasize that all these dynamics have generated hardships to which labor, in Silver’s case, and austerity protesters from various nations, in ours, have responded.

We argue that one way to prioritize a world-systems perspective is to examine the political implications of the economic hardships that drive the emergence of anti-systemic protest. Similar events taking place in independent states does not mean these are independent events (Smith and Wiest 2012); indeed the simultaneity of such protest activity in response to the currently hegemonic disciplinary and extractive strategy confirms these actions as anti-systemic. The term hardships may not be used by many, but analogs abound: “inability of the system to continue providing benefits to key groups” (Smith and Wiest 2012: 5); globally-imposed austerity (Arrighi, Hopkins, and Wallerstein 1989); “rising food insecurity and water shortages” (Smith and Wiest 2012: 7).

A World-Systems Theory of Protest Movements

A world-systems movement theory should suggest that protest is more active and with potentially more significant outcomes in a cyclical fashion – moments of changing hegemony may provide that cyclic impetus and make movement action more likely. Smith and Wiest (2012) suggest that as hegemony shifts, so too may political ideologies and other resources crucial to mobilization. As hegemony shifts also, so too may methods of accumulation and expropriation (Arrighi 1994) which may affect reasons for mobilization. The long history of austerity, however, suggests that even if hegemons may be changing, hegemonic policy is not.

As a lens on global history and development, world-systems focuses on inequality, and inequality is manifested in hardships. The appropriation of peripheral and semi-peripheral surplus value by the core is a crucial expression of power in the world-system and results in hardships historically and currently. Hardships change over time, of course. Earlier moments of capitalist penetration and consolidation stole people and materials from peripheral nations; methods of extraction have become subtler, more indirect, and at times less visible since the days of slavery and colonialism.

The question about hardships, then, is whether and how such fluctuations in hardships drive protest, especially during moments of hegemonic change. This question is important even though most modern social movement theory ignores the fact that people indeed protest because of hardships. A world-systems informed theory of social movements cannot avoid addressing hardships. The existence of a hierarchically organized world-system, built on the pursuit of ever-accumulating profit, has leveled enormous damage globally, and the social movement responses to it clearly address issues of immiseration and inequality.

We remain sensitive to the importance of history to world-systems analysis. That is, at any point a variety of economic, political, and cultural trends are at work, including specific world-system shocks and the uneven application of austerity policies. Complex historical differences

make general causal modeling difficult, but we continue to prioritize hardship as an indicator of long-term world-system inequality and short-term imposition of immiserating policy. Finally, because regional differences are foundational to world-systems analysis, explanations of core, semiperiphery and periphery differences in protest are important. This is the next step in our analysis – for now, our data reflects a model based on four semi-periphery countries: Argentina, Brazil, Mexico, and Venezuela. Further examinations will prioritize peripheral and core nations, and comparisons among them.

Data and Methods

Our data for protest was drawn from a larger database generated through a Lexis-Nexis newspaper search examining austerity protest events. Newspaper accounts were coded for protest events and severity, spread, and duration, as well as variety of participants. This data was added to a database derived from a variety of sources that detailed political and economic conditions in the nations under examination. Time series indicators in the database were used to generate indices for short-term hardship, long-term hardship and the other indexes created. For this paper, we were interested in a Latin American set of cases selected by the juxtaposition of the similarity of their experiences with austerity and their similar positions in the world system.

The objectives of the study were to develop causal models of austerity protests in Latin America for the period 1990-2000. The overall methodological strategy was to develop initial models that closely fit the historical experience of Mexico. The senior author's fieldwork in and long study of Mexico during the period provided first-hand observation of causal processes. The causal models developed in Mexico were then cross-validated (Efron and Tibshirani 1997; Kohavi 1995; Snee 1977) in other Latin American countries.

The strategy used here for establishing causality had three components: (1) historical analysis, (2) time series testing of Granger causality (Granger 1969) and (3) causal modeling (Pearl 2000) using path analysis (Fox 1980; Pedhazur and Kerlinger 1982). Path model estimation would be limited to models that exhibit Granger causal ordering. The rationale for the methodological strategy was that (1) the histories of Latin American countries during the sample period had many unique aspects that should not be lost in the statistical analysis, (2) causal ordering could only be established on the basis of data aggregated to the yearly level and (3) because economic shocks, political shocks and protest happen in real time, path analysis would be needed to establish the instantaneous causality beneath the yearly time series data. Indexes were constructed for IMF pressure (IMFP2), Long-term Hardship (LTHARD2), Globalization (GLOB), Short-term Hardship (STHARD2), Civil Liberties (CIVLIB2) and Protest (PROT1) using principal components analysis (PCA) (Jolliffe 1990). The numerical suffix attached to an

index name indicates which component was used to construct the index. For secular time series data, the second index typically captures cyclical fluctuations (Granger and Newbold 1974).³

Path Model Explanation

We explain the impact of hardships on protest through a series of paths linking our indices (see Figure 1 below). We separate our discussion of hardships into long-term and short-term hardships. The long-term hardships index (LTH) was constructed to reflect the costs of being a semi-peripheral nation, as indicated by variables such as long-term unemployment, infant mortality, life expectancy at birth, access to potable water and sanitation, among others. Although the variables that make up this index, like short-term hardships, are measured across the decade of the 1990s, we see these as hardships resulting from longstanding structural results of semi-peripheral status. That is, we argue that although these kinds of measures can vary by year or even decade, they still provide defining characteristics of semi-peripheral status, longstanding economic harm resulting from world-systemic rooted inequality. The persistence of LTH, even as it varies across the decade, makes the shorter-term hardships more likely, we hypothesize. We examine two models hypothesizing pathways to protest: one demonstrates a direct link between LTH and protest (not reflected in the multi model Figure 1, but in Figures 3, 6 and 7), and the second an indirect link of LTH through short-term hardships.

Short-term hardships (STH), our path suggests, lead to protest directly. Short-term hardships are made up of measures such as inflation, consumer prices, household consumption, food prices, and other measures of poverty that we propose are driven by three causes pertinent to the time under study. Prior to STH are long-term hardships (in models 1, 2, 4, and 5), as we suggest that economic damage may be cumulative, a position shared by left and right political economists alike, and consistent with world-systems analysis. Additionally, and specific to our argument, we suggest that short-term hardships may also be caused by IMF pressure (IMFP), an index demonstrating the extent to which a nation has been subjected to stabilization programs. Our indicator of globalization impacts (GLOB) makes up our final exogenous index. The impacts of globalization are contested across the political and academic spectrum; one position is that globalization is nothing new but is instead a repackaging of world-system analysis (Wallerstein 2000). Others find globalization to be a relatively new phenomena, but relatively innocuous in impact, even ushering in new democratic forms of political participation (Boli 2005; Boli, Meyer, Thomas and Ramirez 1997). We expect that increasing globalization, defined

³ Further discussion of methods and measures, see the Statistical Appendices included with this article.

as the process of creating networks for the flow of surplus and factors of production, will cause hardship and protests, along with numerous political and academic analysts (Bello 2001; Broad 2002; Fisher and Ponniah 2003; Robinson 2004; Shefner and Fernández-Kelly 2011). This index includes cyclical measures of economic freedom, CO2 emissions, business cycles (GDP), cycles of energy use, cycles of employment and cycles of population growth, as well as the KOF index of Globalization (discussed more fully and evaluated in the Statistical Appendix, see Footnote 3). We interpret this as an additional exogenous variable that displays cyclical fluctuations of economic pressure from the global world-system, which helps us partition out effects on hardship related to IMF Pressure and long-term hardships.

We have documented the immiseration of Latin America in sections above; here the path models demonstrate our position that such hardships drive protest. Protest is not irrational, and in these cases is triggered by clear material hardships felt in the short-term, but also exacerbated by long-term hardships, IMF pressure and globalization. In addition, attention to these protest dynamics leads us to suggest that IMF pressure additionally has a direct path to protest. Examination of the protest events makes it clear that protesters are fully aware of the extensive role the IMF and other international financial institutions have played in imposing economic conditions on their home nations.

The other path to protest avoids hardship and operates through civil liberties, with the expectation discussed by Tilly (1978), that greater civil liberties will increase protest. Civil liberties provide a political culture that acts in a legitimating fashion by building systemic consensus, but also provide for protest because those mobilized have less fear of acting outside traditional institutions of politics, and hold less fear of state reprisal. Low civil liberties suggest an oppressive state, thus increasing likely costs to protesters if they take to the streets. Almeida (2003) and Dixon and Martin (2012) in some ways conform to this interpretation of protest. Addressing civil liberties without hardships allows us to examine the traditional political opportunity structure discussion, which ignores hardships in its explanation that political shifts are more important in explaining protest.

In addition to our indices, our model provides for the potential impact of shocks in addition to the cycle of austerity and hardship. We conceive of shocks as individual moments to which people respond as one-off events, as opposed to the patterned cycle of austerity and hardship to which people responded with a more sustained mobilization.

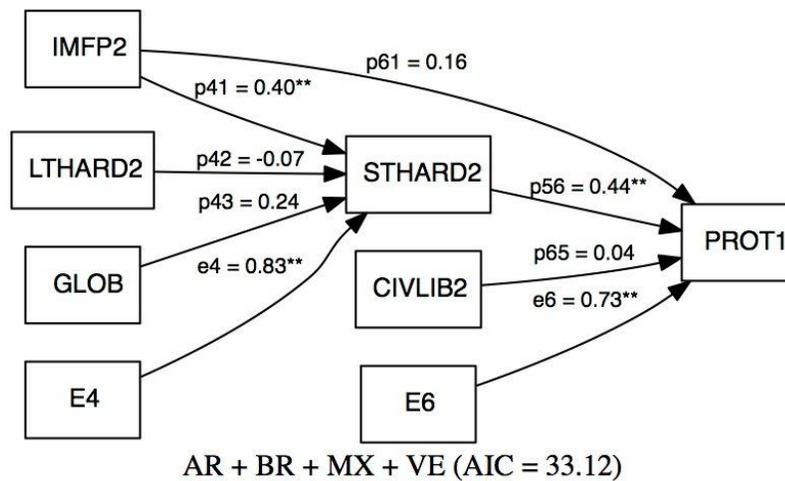
Path Model Analysis

Figure 1 is our best multimodel, estimated by combining the results of our four country models (AR Argentina, BR Brazil, MX Mexico and VE Venezuela). A multimodel path diagram is constructed by averaging together the correlation coefficients across countries (Burham and

Anderson 2002) and then re-estimating the model. It investigates general causal factors abstracted from the variable histories of the countries.

We find both confirming and surprising results. First, our expectations regarding the positive impact of short-term hardships on protest are strongly confirmed. Austerity protests are largely explained by the imposition of short-term hardships ($p56 = 0.44$, all path coefficients are standardized). Additionally, IMF pressure continues to be a clear generator of those short-term hardships ($p41 = 0.40$), a result that confirms decades of qualitative and quantitative study.

Figure 1. Best Multimodel (* $p \leq 0.05$, ** $p \leq 0.01$)



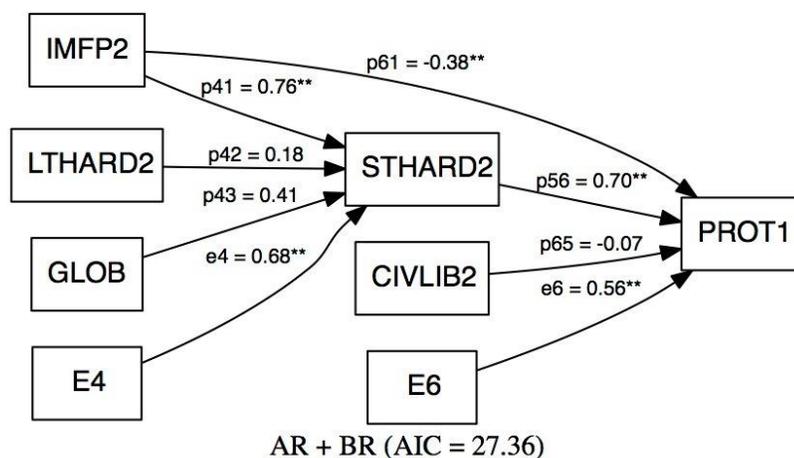
IMF pressure, however, does not have a direct significant link to austerity protest ($p61 = 0.16$), which suggests that it is the effects of the policy, not just the often well-publicized policies themselves to which people respond. Additionally, as others have noted (Harvey 2005), neoliberalism has been applied in uneven ways, and the same can be said regarding austerity policies. More surprisingly, neither long-term hardships ($p42 = -0.07$) nor globalization ($p43 = 0.24$) have a significant impact on short-term hardships. We will return to this seemingly problematic finding later. Finally, the long-theorized positive effect of civil liberties on protest (Tilly 1974) find no support in the multimodel ($p65 = 0.04$).

As we further unpacked our findings, we found that our multimodel could be refined based on our initial development of the MX model. When analyzing the individual country path models

(discussed below), we observed similarities between Argentina and Brazil and between Mexico and Venezuela. To investigate the similarities, we created two additional multimodels (AR + BR and MX + VE). Both of the new multimodels further reinforce our arguments regarding the importance of hardships to protest, but short-term and long-term hardships play roles we did not fully expect.

In Figure 2 (a multimodel for Argentina and Brazil), we find additional strong results for our original multimodel, as IMF Pressure again plays an important causal role both directly on protest ($p_{61} = -0.38$) and indirectly through short-term hardships ($p_{41} = 0.76$ and $p_{56} = 0.70$). Short-term hardships play a strong and significant causal role in determining protest events. Notice that the increase in IMF pressure decreased protest ($P_{61} = -0.38$) while the associated hardships strongly increased protest ($p_{41} * p_{56} = 0.53$). All other effects, except for shocks (E4 and E6) are non-significant.

Figure 2. Best Multimodel, Argentina + Brazil (* $p \leq 0.05$, ** $p \leq 0.01$)



The lack of a significant direct effect from short-term hardship to protest in Mexico and Venezuela country-level models (see below) led us to investigate the direct effect of long-term hardship on protest. In Figure 3 (a multimodel for Mexico and Venezuela), we removed long-term hardships from its exogenous position, and substituted it for short-term hardships. We

continue to find strong and significant direct results for IMF pressure on protest ($p_{61} = 0.80$). Neither IMF pressure nor globalization cause long-term hardships ($p_{41} = 0.04$ and $p_{43} = 0.33$), but long-term hardships do indeed have significant, if somewhat weaker, direct effects on protest ($p_{56} = 0.25$). In Mexico and Venezuela also, civil liberties have a strong and significant relation to protest – as civil liberties increased, so too did protest ($p_{65} = 0.58$).

Figure 3. Best Multimodel, Mexico and Venezuela (* $p \leq 0.05$, ** $p \leq 0.01$)

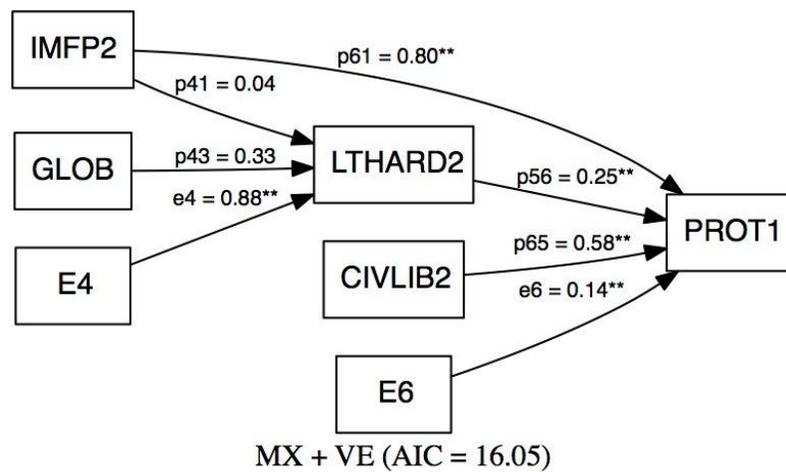
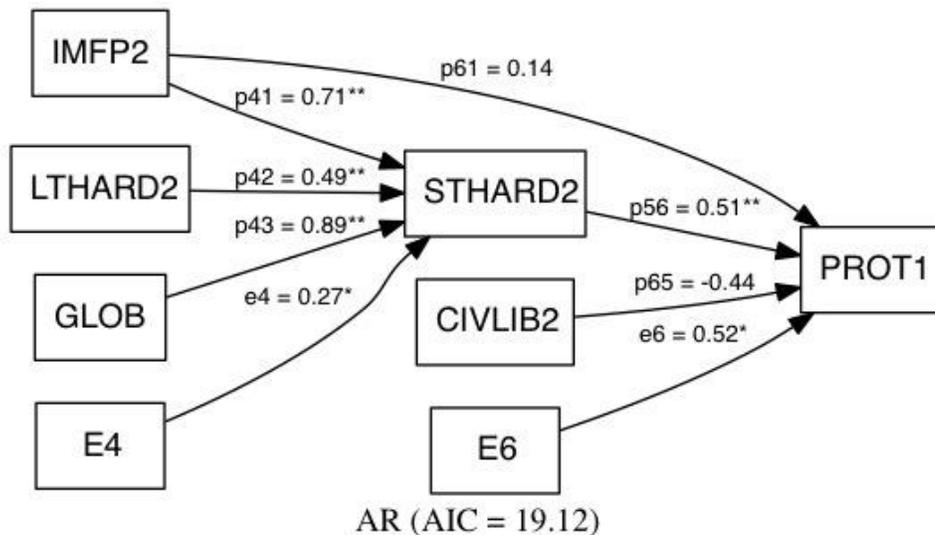


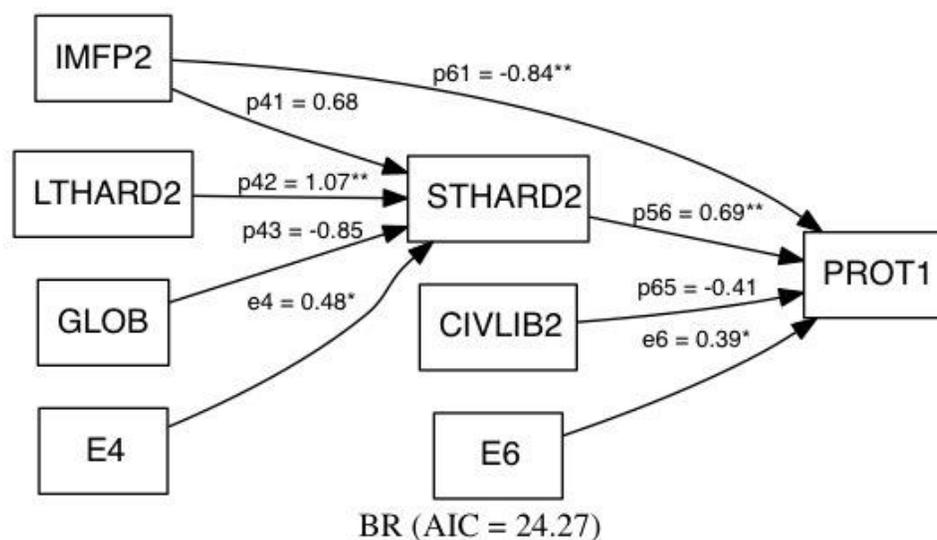
Figure 4. Argentina simplified FF Model (* $p \leq 0.05$, ** $p \leq 0.01$)



To summarize the two disaggregated multimodels: (1) In the AR + BR multimodel, IMF pressure creates short-term hardship which creates protest, and IMF pressure directly creates protest. (2) In the MX + VE multimodel, IMF pressure, long-term hardship and civil liberties each act as exogenous variables creating protest. As we turn to individual country path models, we note that we will elaborate further with two short case studies, but in general the hypothesized relationship of hardships to protest has been confirmed.

Argentina (Figure 4) reflects the aggregate multimodel, with some unique differences. Austerity protests respond to short-term hardships ($p56 = 0.51$), while short-term hardships are in turn explained by IMF pressure ($p41 = 0.71$). In contrast to the aggregate multimodel, however, protests in Argentina show no direct effect from IMF pressure. Again in contrast, long-term hardships ($p42 = 0.49$) and our globalization index ($p43 = 0.89$) demonstrate strong and significant links to short-term hardships as we expected. Civil liberties do not have a significant effect and the coefficient ($p65 = -0.44$) is in the reverse direction than the literature suggests – here increased civil liberties have a diminishing effect on austerity protest.

Figure 5. Brazil simplified FF model (* $p \leq 0.05$, ** $p \leq 0.01$)

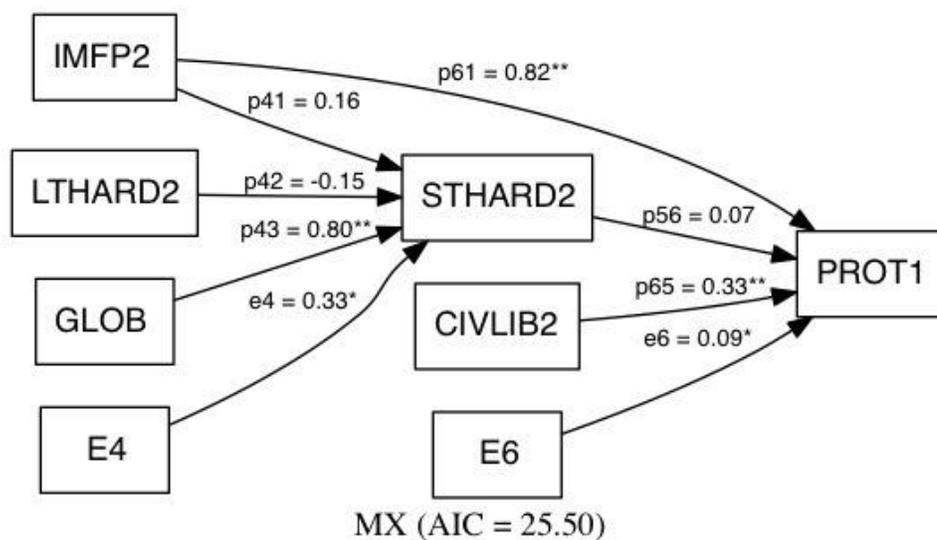


In Brazil (Figure 5), IMF pressure ($p61 = -0.84$) again has significant direct effects on protest but with a negative sign. IMF pressure does not, however, have significant effects on short-term hardships ($p41 = 0.68$). Long-term hardships have strong and significant impacts ($p42 = 1.07$) on short-term hardships, while globalization does not ($p43 = -0.85$). Finally, short-term

hardships have strong and significant impacts on protest, as hypothesized ($p56 = 0.69$), and the effect of civil liberties ($p65 = -0.41$) is not significant. In Brazil, the application of IMF Pressure reduced protest against the background of significant long- and short-term hardship.

In Mexico (Figure 6), the country in which we developed our model before cross validating in other Latin American countries, we did not find a significant relationship between short-term hardship and protest ($p56 = 0.07$). This result led us to reconsider the role of long-term hardship in the MX + VE multimodel, that is, substitution along a direct causal path in the model (the modified path model is presented in the Statistical Appendix, see Footnote 3). Figure 6 shows that there are significant links from IMF pressure ($p61 = 0.82$) and civil liberties ($p65 = 0.33$) to protests. The link between globalization and long-term hardship ($p43 = 0.80$) is also significant as are shocks E4 and E6.

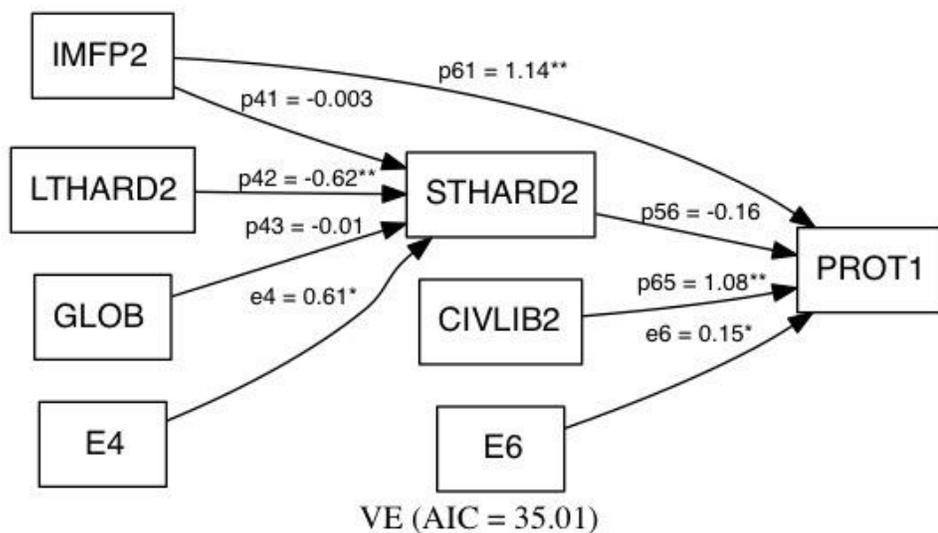
Figure 6. Mexico Simplified FF model (* $p \leq 0.05$, ** $p \leq 0.01$)



The same result is replicated in Venezuela (Figure 7). Here, IMF pressure ($p61 = 1.14$), long-term hardship ($p42 = -0.62$) and civil liberties ($p65 = 1.08$) all have significant effects. Globalization, however, does not have significant effect on short-term hardship ($p43 = -0.01$) and short-term hardship does not have a significant effect on protest ($p56 = -0.16$). (We have run models for both Mexico and Venezuela where long-term hardship has been substituted for short-term hardship as in the MX + VE multimodel. Since the results are the same as the multimodel they have not been reproduced here but can be found in the online Statistical Appendix referenced in Footnote 3).

The results of the national path models suggest three major conclusions: (1) the same generalized path model predicting a path from hardship (short-term or long-term) to protest fits the four nations examined, but (2) the path to protest in each country is somewhat different, as are (3) the effects of globalization, IMF pressure and civil liberties. Given the different histories of Mexico, Argentina, Brazil and Venezuela during the sample period (1990-2000), there is no a priori reason to believe that one model should fit each country. The fact that one generalized model did fit all the countries is a strong result, and confirms our theorizing of the impact of hardships. In all cases, this result is confirmed. The direct and indirect effects in the model, on the other hand, are rich enough to allow for different paths to protest, and we discuss those more completely in the two case discussions below.

Figure 7. Venezuela Simplified FF model (* $p \leq 0.05$, ** $p \leq 0.01$)



Mexico

The strong influence of IMF pressure, long-term hardships, and expanding civil liberties on protest in Mexico in the 1990s, we argue, has much to do with Mexico's position as an early experiment with neoliberalism and austerity. Mexico narrowly avoided harsh measures from the IMF and the U.S. treasury in the late 1970s when they discovered oil reserves that facilitated more borrowing and spending. By 1982, however, the Mexican government announced that it was unable to meet its debt obligations. The subsequent responses by the international financial

community ushered in a period of neoliberal policy that lasts to this day. The long-standing experience with neoliberal policy generated a long history of austerity-linked hardships, and left a legacy of organized groups willing to protest against IMF policy. The growing election losses suffered by the PRI, culminating in the 1988 presidential election in which the predominant party kept the presidency only through fraud, led the government to expand civil liberties, especially in the electoral sphere.

Since 1982, the Mexican government has followed IMF prescriptions, devaluing the peso, reducing social welfare spending, eliminating consumer subsidies, privatizing state-owned enterprises, and creating wider openings for foreign investment while reducing local industry protection. Prior to the crisis, Mexican economic development created an unequal distribution of wealth that allowed for a general increase in the standard of living among the urban working and middle classes. Throughout the 1960s and '70s, real minimum wages rose steadily, while prices of basic foods decreased. Survey data revealed that in the late '70s ". . . over 50% of the industries surveyed . . . paid wages high enough to allow their workers and their families to survive on a single wage" (Escobar Latapì and Roberts 1991:98). Debt and austerity reversed this relative prosperity, and brought decades of negative economic growth and reductions in social spending.

During the 1980's, Mexicans felt the pain of austerity policies in ways that ranged from unemployment and under-employment, to wage declines, to increases in food prices and subsequent declines in calorie consumption (Lustig 1990; Davis 1990; Cordera Campos and Gonzàlez 1991). Reductions in government spending also resulted in a general decline in health, as well as a reduction in quality and quantity of public health services (Cordera Campos and Gonzàlez 1991). The Mexican population suffered further when neoliberal policymakers slashed state jobs. By July 1985, cuts eliminated 20% of the personnel in local and regional governments (Gentleman 1987). By 1985 also, privatizations cut the state's industrial sector by 41%. The state's power as employer was clearly on the decline, leading to ". . . drastically reduced employment prospects and living standards . . . felt most by urban popular and middle classes" (Davis 1990: 353).

Neoliberals in Mexico also ended a tradition of protecting local industries, and opened the domestic consumer market to foreign industries. In this way, the Mexican middle class, a traditionally privileged sector, suffered a great deal of harm, and started looking for new ways to express political opposition (Williams 2001; Tarres 1987). Thus by the 1990s, Mexicans had already endured years of neoliberal hardships.

The struggle between opposition and state entered a new phase in the early to mid-1980s. The government's political crisis was rooted in its failure to serve the multi-class base upon which it had depended for support. New social movement activity challenged PRI (*Partido*

Revolucionario Institucional) dominance by forming alliances, and by adding democracy to the list of demands along with more familiar attempts to win urban infrastructure and better protesters' quality of life (Shefner 2008). The wider expression of dissent demonstrated the increased likelihood of the opposition to recognize similar demands, to work beyond community differences, and to cooperate rather than suffer divisions at the hands of the state. Wider coalition building also demonstrated the PRI government's failure to satisfy local needs and to channel dissent into venues that are safer for the system.⁴

The coalitions worked to further a common set of demands in ways previously unseen in the Mexican popular opposition (Carr 1986:15). CONAMUP (the National Coordinator of the Urban Popular Movement - La Coordinadora Nacional del Movimiento Urbano Popular) for example, united over 60 organizations in 14 Mexican states, and pressed demands for urban services and secure land tenancy while promoting self-help skills to the urban poor (Ramirez Saiz 1992). CONAMUP participated in several anti-austerity campaigns and actions, including two civic strikes in 1983 and 1984. The civic strikes were nationally coordinated “. . . activities ranging from work stoppages . . . to meetings, marches, encampments outside public buildings, land occupations, roadblocks, hunger strikes, boycotts of commercial establishments, and power turn-offs” (Carr 1986: 17).

Uniting on demands, strategy, and mutual support, these alliances directly challenged a political system based on maintaining “. . . multiple sectoral, regional, political, and cultural cleavages” through clientelist relations and a corporatist state structure (Foweraker 1989:111). The coalitions' efforts to create centralized forms of mediation weakened the state's ability to channel and neutralize popular mobilization (Foweraker 1989). Civil liberties over the 1990s expanded largely due to the efforts of protesters and the new electoral gains won by opposition parties beginning in the mid-1980s.

Until 1988, the PRI had won every presidential, gubernatorial, and senatorial election since 1929 (Baer 1990: 35). The 1988 election decisively showed Mexico was no longer a one-party state (Guillèn Lopez 2001), and resulted in the lowest presidential turnout for the PRI in its history, barely electing the PRI candidate, if official results are to be believed. By 1988, the proportion of electoral districts dominated by the PRI dropped to 35% from the 1964 rate of 85%. For the first time the presence of three significant and alternative political forces was felt: the PRI, the leftist coalition, and the traditional conservative opposition, the PAN. Elections in

⁴ Urban neighborhood associations played a significant role in organizing dissent. The urban popular movement (MUP) grew out of the failure of traditional PRI-neighborhood relations to satisfy demands and represent the community. Urban residents in the popular movement have struggled over land tenure, housing, services and infrastructure, alternative urban planning, and metropolitan governments.

1991 widened the possession of elected seats, from congressional and local deputies, to senators and governors.

The 1994 elections yielded further opposition gains.⁵ From that point on, the strategy of the remaining PRI legislators, as well as their newly-elected opponents, was to increase civil liberties. Protest against austerity continued throughout the 1990s as it represented one of the most visible manifestations of the global economy.

Despite the impact of neoliberalism and austerity on long-term hardships, we found that other indications of increasing globalization did not lead to long-term hardships in Mexico. It is hard to reconcile these outcomes, but two important trends may help us understand why globalization as measured did not lead to long-term hardships. First is the safety valve that Mexico has used for decades, immigration to the United States. The number of native Mexicans living in the United States increased from 2.2 million in 1980 to 11.9 million in 2009, with the biggest increase in the period beginning in 1980. The option to migrate, as difficult as it was for individuals and families, relieved pressure on the Mexican labor market. Additionally, the remittances sent back by migrants further aids their families: approximately 1.6 million Mexican families relied on remittances as their sole source of income, and remittances to Mexican ranged from \$US 6 billion to \$US 13 billion annually over the 1990s (Cypher and Delgado Wise 2010: 145-148).

The 1990s were also a period of increased employment in the maquiladora sector. In 1983, 600 maquilas employed 151,000 workers; by 1994 over two thousand maquilas employed 581,000 workers. Maquila employment peaked in 2000 with 1.3 million workers, and none of these figures address the multiplier effects of those jobs (Cypher and Delgado Wise 2010: 80). As Cypher and Delgado Wise make clear, “in the period of rapid growth for the maquilas – 1994-2000 – the industry was considered a growth pole both in terms of exports and in terms of the 2,157,000 direct and indirect jobs created in those years” (Cypher and Delgado Wise 2010: 81).

The maquila jobs did not pay well, and migrants were hard pressed to send a great deal of money to their families. Nonetheless, the presence of both of these income flows helps us understand why globalization as measured did not lead to long-term hardships, even though neoliberalism and austerity clearly did.

⁵ 95 PRI senators, 24 PAN senators, and 9 PRD senators were elected in 1994; the national Chamber of Deputies resulted in 388 *priistas*, 57 *panistas*, 25 *perredistas*, and 3 deputies from the smallest party that showed sufficient strength to be awarded representation, the PT (Partido del Trabajo).

Argentina

Argentina provides an illustrative case of how long-term hardships, globalization, and IMF pressure are linked to short-term hardships, and how short-term hardships are linked to protest. Upon transitioning back to civilian rule in the mid-1980s, Argentina was burdened by the large debts incurred by the military junta over the previous decade. After a failed heterodox attempt by President Alfonsín's civilian government to stabilize the economy in the midst of rising inflation and the debt crisis, Carlos Menem of the *Partido Justicialist* won the presidential elections in 1989. Taking office ahead of schedule because of the hyperinflation crisis in 1989, Menem began an ambitious neoliberal program of reforms that transformed Argentina into an exemplar of a neoliberal state (Rowland 2013).

Though the military junta that ruled Argentina from 1976 to 1983 carried out a few partial neoliberal reforms, extensive neoliberalization of the country only took place under President Carlos Menem in the 1990s. Menem began implementing far-reaching neoliberal reforms as soon as he was in office, forming a coalition with traditional Argentine conservatives (Schwarzer 1998). In 1990, Menem announced "massive rises" in fees for public services and government-subsidized gasoline prices (Reuters 1990a). That same year, Menem's government cut 80,000 federal civil service jobs and another 80,000 contract workers from government-owned companies (Reuters 1990b; Jarvie 1990). He also cut and then capped the salaries of federal government employees. These job cuts were linked to the government's privatization efforts. Between 1990 and 1995, Menem's government privatized

most public utilities – telecommunications, airlines, power generation and distribution, gas transportation and distribution, water and sewage systems, and passenger and cargo railways – and sold off the vast majority of productive facilities (including oil and gas extraction, coal mining and steel mills). The remaining privatizations include four hydroelectric power stations... the airports, the post office and some petrochemical facilities (Economist Intelligence Unit 1996).

The government also partially privatized the pension system. Other government-run operations, such as passenger railroad lines, that Menem could not find buyers for were simply shut down for purposes of austerity (Pozzi 2000: 70).

Under Menem, the federal government stopped paying for provincial budget deficits while also partially devolving authority for education, pensions, and health care to the provincial level. This devolution of government resulted in a greater burden of social program costs on provincial

governments that were unable to pay, leaving them no choice but to cut back on the programs. The ensuing fiscal crises in many provinces led to government employees and pensioners receiving pay cuts and sometimes going months without pay (The Economist 1994).

All of these austerity reforms took place as part of a wider series of neoliberal reforms, which included large reductions on trade restrictions and tariffs (Fanelli and Frankel 1999; Lora 2001; Morley, Machado, and Pettinato 1999), reductions in worker protections (Patroni 2002), and financial liberalizations that made Argentina one of the most open capital markets in the world (Economist Intelligence Unit 1996; Fanelli and Frankel 1999; Rowland 2013). These reforms resulted in some positive outcomes: the consumer price index fell from 3,079.2 percent in 1989 to 4.3 percent by 1994 and GDP grew during this period (Starr 1997: 84). However, this was immiserating growth that failed to decrease poverty rates and actually led to increasing rates of inequality and unemployment (Shefner, Pasdirtz, and Blad 2006). The targeted, conditional cash transfer programs that Menem's government implemented to soften the hardships faced by the least well-off segments of the population did nothing to decrease poverty rates or to stop the growth of inequality in Argentina.⁶

One of the most immediate effects of austerity reforms—mostly from government job cuts due to austerity and jobs cut from the newly privatized firms—was a rise in both unemployment and underemployment. Throughout the “lost decade” of the 1980s, unemployment in Argentina averaged 6 percent. However, the average unemployment rate for the 1990s (when most neoliberal reforms were implemented) rose to 17 percent (Villalón 2007: 144). Some provinces suffered an even higher unemployment rate.

By 1993, austerity was beginning to take its toll on the poorer sectors of the society. The earliest collective actions attributed to austerity policies were what Villalón (2007) calls the *puebladas* [Pozzi (2000) refers to them as *azos*]. These town revolts began in Santiago del Estero in 1993 when, after three months without pay, government employees burned three government buildings and the houses of several political officials. This province's economy was largely fueled by the provincial government, which, like many of Argentina's poorer provinces, was by far the largest employer, employing 46 percent of wage earners (Auyero 2003: 124). After the *Santiagazo*, as the protests in Santiago del Estero were called, austerity, corruption, and privatization protests became more and more common. “After the *Santiagazo* there were town revolts in other provinces – in La Rioja, Salta, Chaco, Entre Ríos, and Tucumán in 1994, Jujuy

⁶ CCT programs are generally targeted cash transfers, conditional on the recipients completing some type of training program, attending school, receiving routine health check-ups, or other activities deemed important for their economic success.

in 1994-1995, San Juan, Córdoba, and Río Negro in 1995, and Corrientes in 1999” (Villalón 2007: 143).

The protest tactic of creating roadblocks or *piquetes*, started in the Patagonian Province of Neuquén in 1995 (Villalón 2007). These roadblocks were a direct response to the desperate human conditions in the former YPF company towns of Cutral Có and Plaza Huincul where 23,500 people had fallen below the poverty line (Pozzi 2000: 65)⁷. About 5,000 *piqueteros* manned barricades around the towns and were besieged by security forces until reaching a compromise with the government where they received some emergency relief aid. This form of protest became a favorite of the unemployed, underemployed, and the informal sector workers. The popularity of these protests is evidenced by the fact that “by 1997 70 percent of the provinces registered at least one protest of this type” (Villalón 2007: 144).

In 1989 and again in 2001, several cities around Argentina experienced outbreaks of food riots in which groups of people engaged in the looting of grocery stores (Auyero 2006, 2007; Auyero and Moran 2007). Auyero (2007) argues that these protests were not connected to austerity reforms but as Auyero himself shows, the main participants in these food lootings were the very people that neoliberalism had left behind. Thus, the food lootings must be understood as collective action by the poor responding to a socio-political setting of financial and political crisis brought about in large part by neoliberal reforms, in which the existing clientelist networks failed to provide the essential material goods necessary to keep the poor under social control. As Shefner (2008) showed, neoliberal measures including austerity make clientelism a tenuous form of political control.

By 2001, the effects of austerity, privatization and other neoliberal reforms came to be seen as threats to survival even among members of the middle class. “With unemployment at nearly 20 per cent and underemployment pushing the population living in poverty to nearly 50 per cent, the national market was shutting down” (2006: 273). When the middle-class took to the streets in 2001, banging pots and pans and chanting *Que se vayan todos*, it was “a frontal rejection of what was now perceived as a self-serving and corrupt governing class and a loss of faith in neoliberalism, which was blamed for having brought Argentina once more to the brink of chaos” (Grugel and Riggirozzi 2007: 94).

⁷ YPF is the abbreviation of the now privatized Argentine state oil company *Yacimientos Petrolíferos Fiscales*.

Conclusion – Back to Theory

In this examination of austerity in semi-peripheral nations, we have explained protest as a response to cycles of hardship and world-system economic conditions. Economic and political shocks play different role in different countries. The path models we designed successfully separated cyclical factors creating hardship from external shocks. We have also demonstrated the negative effects of globalization, through immiserating growth, for some countries (Argentina and Mexico). Where globalization has not resulted in short-term hardships, and so protest, we have explained that by referring to specific national histories. The clear results of austerity as it is linked to hardship and protest is obviously in marked contrast to the position of neoliberal policy-makers that austerity provides the path out of debt and toward prosperity. Recent experiences in Europe, including the negotiations of the anti-austerity leftist party Syriza in Greece, reinforce our findings.

As our research shows, despite the position of much social movement theory of the past four decades, hardships cannot merely be assumed and so removed from an important component of understanding protest. Again, we do not deny the importance of ideology, framing, and the articulation of felt grievances. But our analysis demonstrates it is crucial to understand the influence of hardships in examining how protest emerged in these cases.

One may be tempted to say, “Well, of course – when people protest, they protest about something”. We have emphasized that this insight has been ignored by the parade of paradigms in recent social movement theory. Hardships count. What they may be, and how people respond is mediated through culture and political systems. Historical struggles differed in our cases, but the strength of the finding remains. This paper demonstrates that we have a great deal to learn about how hardships interact with mobilization, political systems, and the state in the occasion of protest. This insight is particularly important to world-systems researchers as we now see that the world-system differentiates the globe not only by wealth, inequality, and state systems, it also differentiates protest movement activity in response to the class project of neoliberalism.

The next steps in this work are, first, to separate out analyses of austerity protest in peripheral and semi-peripheral nations. The economic and material disadvantages imposed on peripheral nations are compounded by repressive political institutions, which adds another dimension to our examination of the impact of civil liberties and protest. Space to contest political and economic injustice appears greater among semi-peripheral nations than among peripheral ones given recent trends of electoral democratization. Second, an additional important part of a world-systems theory of protest is to understand if different kinds of hardships are more likely than others to drive protest. As we pursue this work, we emphasize that both a focus on

hardship and understanding the different ways protest emerges across world-systems regions continues to be an important piece of a world-systems informed theory of social movements.

Our examination of austerity protests also challenges the position that to truly push class struggle and significantly disrupt the world-system, popular movements must unite across borders. In both academic discourse and venues such as the World Social Forum, the need to transnationalize struggle is often voiced. Those that fail to do so will instead ‘strengthen the interstate system’ . . . as seemingly independent protests “ . . . probably will not in themselves prove to be a step or stage in the eliminating of the accumulation process as central organizing force of the modern world-system” (Arrighi, Hopkins, and Wallerstein 1989: 74).

Perhaps this position is mistaken. Perhaps it is the death by a thousand cuts that is a more likely strategy to debilitate the world-system. First, one of the strengths of the current mode of accumulation is the great mobility of capital. If this mobility is stymied by similar protest movements, place by place, then the real world geography of production may be resisted. This analysis is similar to Silver’s (2003) recognition of the ongoing strategic places certain workers play in the global economy – for her, the advantage is determined by worker’s crucial place in communication or transport, but the point is similar. Such protest may be coordinated globally, but it is difficult to do so. Our results suggest it may be the simultaneity of hardships, as opposed to synchronized protest, that may prove an effective source of resistance.

Second, the barriers to working together are many for movements, certainly across periphery/semi-periphery/core divisions. The different kinds of advantages, power, and resources that pertain may provide resources to protesters in the periphery at times, but may limit common action in other ways.⁸ Thus, national protests such as those against austerity may prove of great importance. Third, theory notwithstanding, most struggles remain national struggles even if they are replete with substantial antisystemic implications. These protests should definitely be understood as against an international order, but it is the *national* manifestation of such hardships that is targeted. That is, despite all the discussion of the Seattles, Quebecs, Washingtons, and Cancuns, people feel the hardships generated by world-systems inequalities nationally, and they respond to national governments imposing the international order. We still endorse the Piven and Cloward position regarding how people feel harm and act – for them, within variously-defined communities, in these cases as a result of an international policy imposed nationally.

Finally, such struggles may embolden national states in a way that they may resist more successfully than in the past. The more positive economic fortunes of many of the ‘Pink Tide’ nations during the recent crisis, in comparison to many nations whose governments did not resist

⁸ One discussion of difficulties of working together across borders is articulated in Shefner (2012).

neoliberalism, provides a significant indication of greater space for alternative policy than expected just a few years previously. And austerity protests played an important role in the resurgence of the left for much of Latin America. Perhaps these nations provide more of a model of the ‘new Bandung’ (Arrighi and Zhang 2011) than that provided by a Chinese hegemony.

The discussion of “Pink Tide” states and the extent of their possible resistance deserves more space than we can give here, and is a separate part of this project. There remains a reasoned concern that “states cannot alter the basic structure of the world economy that constitutes them” (Smith and Wiest 2012: 34). This is a reasonable interpretation if the singular measure of social movement success is its ability to bring a new force to power that would bring about a socialist transformation. This measure is difficult in part because such an assessment requires too much passage of history, but also in part because the goal may prove too far for this moment of entrenched neoliberalism.

Wallerstein’s comment is instructive in our thinking about additive effects of movements.

The achievement of power by given movements has had two important consequences beyond whatever reforms such movements were able to exact in particular states. These statements have, first of all, quite clearly served as inspiration and reinforcement for analogous neighboring movements, especially at the very beginning of their phase of achieved power. One cannot imagine the political history of the twentieth century without taking into account this spread effect. Mobilization has bred mobilization, and the success of one has been the source of hope of the other. Secondly, the success of the one has created more political space for the other. Each time an antisystemic movement has come to partial or total power, it has altered the balance of power of the interstate system such that there has been more space for other antisystemic movements (1984, 108).

Wallerstein further suggests we think of these changes as providing a “secular upward trend of the overall strength of antisystemic movement in the capitalist world-economy over the past 150 years” which “undermines the viability of the world-system” (1984, 109). It is in this spirit that we hope our analysis will contribute.

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