

The impact of the Racial Equality Directive:
a survey of trade unions and employers
in the Member States of the European Union

Portugal

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1. Demographic background

Over the last two decades, there has been in Portugal a major change in relation to immigration. In 2007, 435,736 foreigners were legally living in Portugal, accounting for around 4% of the total population, while in 2000 foreigners totalled 207,587, having risen from only 107,767 in 1990. In 2007, foreigners accounted for 5% of the labour force, not including irregular workers. Brazilians and Cape Verdeans are the most numerous groups, followed by Ukrainians. The ranking by nationalities is also completely different from earlier immigration phases, with a clear trend towards diversification of origin countries: Africans lost their prevalence, whereas Brazilians and Eastern Europeans became more numerous (Peixoto and Sabino, 2009).

	1990(a)	2000(a)	2007(b)
Nationality			
Total	107,767	207,587	435,736
Europe	31,412	61,678	179,040
EU(c)	29,901	56,850	115,556
Other Europe	1,511 (1.4%)	4,828 (2.3%)	63,484 (14.6%)
Moldavia		15	14,053
Ucrania		163	39,480
Other		4,281	9,9511
Africa	45,255 (42%)	98,769 (47.6%)	147,959 (34%)
PALOP	43,297	93,506	136,694
Cape Verde	28,796	47,093	63,925
America	26,369 (24.5)	37,590 (18.1)	83,592 (19.2)
North America	8,993	10,195	10,446
Latin America	17,376	27,395	73,146
Brazil	11,413	22,202	66,354
Asia and Oceania	4,509	9,272	24,855
China			

(a) Residence permits.

(b) Residence permits (provisional data), extended stay permits and extended long-term visas. Data on new long-term visas not included.

(c) From 1990 to 2000: EU-15; 2007: EU-27.

Source: Peixoto and Sabina, 2009; INE and SEF.

Source: Peixoto and Sabino, 2009; INE and CEF

The *Migrant Integration Policy Index (2007)* reports that Portugal has recently witnessed decreases in migration for work and slight rises for study and family reunion. Newcomers, the majority of whom are female, originate mainly from former Portuguese colonies and Central and Eastern Europe. Non-EU migrants are slightly more likely to be employed than Portuguese citizens. However the unemployment rate for third-country nationals is above the nationals' unemployment rate. These findings on immigrants' situation regarding employment and unemployment are also stressed in the 2008 OECD report *Jobs for Immigrants: Labour Market Integration in Belgium, France, the Netherlands and Portugal*. Portugal is the only country of the four where the employment rate of immigrants is higher than that of the native-born, and for both men and women. This is

largely because recent migration flows to Portugal have been to meet labour shortages. But it has also taken an innovative approach to welcoming immigrants, through a network of immigrant support centres.

Portugal has witnessed a flurry of debate and legislative activity on migration and integration. The Law No. 18/2004 of 11 May 2004 transposed into national law the Directive No 2000/43/EC implementing the principle of equal treatment, irrespective of racial or ethnic origin, and aims to establish a legal framework for combating discrimination on the grounds of racial or ethnic origin. Proposed new immigration and nationality laws have aimed to simplify and facilitate access to family reunion, long-term residence, and nationality for legally resident third country nationals and their children born in Portugal. In 2006 important laws and measures to further immigrant integration were approved: Decree-law n.º 41/2006 and 42/2006 granted equal rights for family benefits and social insertion income and an increased role for National and Local Immigrant Support Centres ; New nationality law, Lei Orgânica n.º 2/2006 improved eligibility ; and the signing of 'Platform on integration and reception policies. In 2007 the Decree Law n 244/98, transposing EC Directives on family reunion and long-term residence and a Three-year integration plan were approved, with 123 measures to improve access to training, family reunion, housing, health, funding for associations, anti-discrimination enforcement mechanisms and equality policies.

In relation to public opinion, the Migrant Integration Policy Index (2007) reports that 'the Portuguese express some of the highest support for equal social rights for migrants (69.3%) and for the right to family reunion (72.2%). Its survey showed that 45.2% believe that migrants should be able to become Portuguese citizens easily. Six in ten Portuguese think diversity to be enrichment, although a significant one in ten do not know. 32.2% did not know that ethnic discrimination in the labour market is illegal. Only 37.8% believe that Portugal is not doing enough to combat discrimination, although six in ten believe ethnic discrimination is fairly widespread. The population was divided on whether foreigners are treated unfairly in the labour market. At 85.9%, the Portuguese are the most supportive in the EU-27 of positive action measures in the labour market based on ethnicity.'

According to the Special EUROBAROMETER 263 'Discrimination in the European Union', 61% of the Portuguese have the perception that discrimination on the basis of ethnic origin is widespread, a percentage slightly below the EU25 average (64%). The percentage of the Portuguese that agree 'that people of different ethnic origin than the rest of the population living in Portugal enrich the Portuguese culture' is 61%, is also slightly below the EU25 average (65%). Nevertheless, the Portuguese consider that discrimination on the grounds of religion and beliefs is not as widespread as discrimination on the grounds of ethnic origin. The percentage of Portuguese (39%) that claim 'that the discrimination on the grounds of religion and beliefs is widespread' is below the EU25 average (44%). Additionally Portuguese show a more positive view (53%) than the average EU25 (45%) that 'enough effort is made in the country to fight all forms of discrimination.

2. Industrial relations background

The Portuguese system of industrial relations emerged in the process of the 1974 democratic revolution, which overturned the authoritarian corporatist regime, in place for almost half a century. Democratisation, decolonisation and economic and social development were central issues of the democratic revolution that played an important role in the configuration of labour movement values and practices.

Until 1978, when the UGT was created, trade unionism in Portugal was dominated by the trade union confederation CGTP. The organisational division brought about by UGT was the result of strong ideological differences. UGT built its discourse and practice in line with a consensus bargaining approach, while CGTP favoured an adversarial bargaining approach. Overall trade union density is now around 30%. Today CGTP, UGT and unaffiliated unions together may have between 700,000 and 800,000 members, with CGTP counting for about two thirds of the organized workforce. Overall average density is near to 20%, reaching considerably higher levels in public services and in some larger companies. Density is low in manufacturing and private services with precarious work relations and/or a high rate of SMEs.

The two trade union confederations UGT and CGTP are represented in the Permanent Council for Social Concertation (CPCS) a tripartite body created in 1984, which includes representatives from state, trade union confederations and employers' confederations. The scope of competencies of this political body includes not only consultation, but also binding agreements on a number of issues such as income policy, employment policy, labour legislation, social policy etc. Industrial relations' main actors take therefore formally part of the process of policy making. At the present, employers are represented by four confederations including the CIP; one representing the service and trade employers' associations, the CCP (Confederação do Comércio e Serviços de Portugal); one representing the tourism employers' associations, the CTP (Confederação do Turismo Português) and one representing the employer associations of the agriculture sector, the CAP (Confederação dos Agricultores de Portugal).

In Portugal there are no national collective agreements at central level. Trade union confederations are not engaged in collective bargaining but very often set out guidelines that can influence sector unions bargaining. Furthermore, they influence incomes policy as well as compulsory minimum wage, which in turn affect collective bargaining outcomes.

Branch agreements set pay and working time for about 94% of the workforce in the private sector. The rest of workers are covered by multi-employer and single employer agreements. The total number of workers covered by valid collective agreements, is about 2.7 million (approximately 93% of the workforce in the private sector in 2007). Collective agreements are published in the Labour Ministry's official Bulletin and are legally binding. Collective agreements can be extended. The Labour Ministry issues extension decrees on the signing parties' request. This is a common practice. With a frequently used extension capability of collective agreements, there is greater reliance upon sector agreements than on local bargaining.

Over the years, tripartism at national level became a major feature of the industrial relations system. Furthermore, the CPCS is, since 1991, an autonomous commission of the advisory body Economic and Social Council (CES), following the 1989 revision of the Constitution. Therefore, since 1991, industrial relations actors have been also involved with other social actors, such as NGOs in a more broad range of issues, through their participation in the CES.

Trade union confederations are represented as well in a number of other national bodies dealing with equality of opportunities, namely the Commission for Equality at Work and employment (CITE) and take part in the Consultative Council of the Commission for Citizenship and Gender equality (Comissão para a Cidadania e Igualdade de Género, CIG). Furthermore, they are represented in the national bodies which deal with ethnic and racial discrimination i.e. the Commission for Equality and Against Racial Discrimination (Comissão para a Igualdade e Contra a Discriminação Racial, CICDR) and the Consultative Council for Immigration Issues (Conselho Consultivo para os Assuntos da Imigração, COCAI), working in cooperation with the High Commission for Immigration and Intercultural Dialogue (ACIDI, IP).

The Commission for Equality and Against Racial Discrimination (CICDR) has the mandate to:

- To collect all information concerning the practice of discriminatory acts;
- To issue opinion on sanctions to be applied by the High Commission against acts of discrimination (Standing Committee);
- To recommend the adoption of legislative measures, regulations and administrative provisions considered appropriate to prevent the practice of discrimination;
- To promote studies and research on the issue of discrimination;
- To make public, by all means available to it, cases of actual violation of law; to prepare and publish an annual report on the situation of equality and racial discrimination in Portugal.

3. Trade union and employers awareness

Both the unions and the employers consider the Racial Equality Directive and the implementing national legislation as a positive step to promote further racial and ethnic equality, on the grounds that it contributed to the systemisation of the already existing legislation, and that the process of its implementation contribute further for an anti-discrimination climate.

A representative of the CGPT was very clear about its importance:

'We have always addressed anti-discrimination. But the law provides a greater number of tools for our actions, and contributes to changing the cultural environment... In qualitative empirical terms, one can say that the fact itself that

the legislation was published, creating psychological and material constraints, enhanced workers' protection. Managers have to be more concerned... also because they do not want to be pointed out as those who do not comply with the law and show racist or discriminatory behaviour ... even just for commercial reasons. Nevertheless this demands a process involving a change of mentality.'

Consultation on the transposition took place through the national tripartite body CPCS and through the Consultation Council for Immigration Issues (COCAI) and the Commission for Equality and Against Racial Discrimination (CICDR).

The trade unions and employers are involved in both bodies and also in an organisation, the Immigration Platform (Plataforma de Imigração) created in 2006 with powers of direct or indirect intervention on welcoming and integrating migrants to Portugal. Besides the unions and employers, its members include other organisations from the civil society (Foundations, members of the Economic and Social Council (CES), and religious organisations).

The CGTP trade union confederation interviewee explained:

'The legislation is in general a good initiative, making rules clear and transparent and thereby defining rules and concepts, and creating a frame of reference that is quite a force for action in terms of creating a greater number of processes for the integration of immigrants in society.'

All those interviewed pointed that the previous national legislation (although dispersed) and constitutional provisions were already very advanced in terms of fighting discrimination based on racial or ethnic origin. The respondent from Portugal Telecom explained:

'We have always had non discrimination practices, and awareness regarding non-discrimination in particular in relation to issues such as recruitment, access to positions of management or leadership, and we have a particular attention in this area. Therefore, the legislation has not brought significant changes in what was our standard internal practices and regulation.'

The interviewees did highlight, however, that the major innovations made by the Directive to the national legislation were those regarding the burden of the proof, where the respondent has to prove that there has been no breach of the principle of equal treatment, and the introduction of the concepts of direct and indirect discrimination. Only one of the interviewed considered that it also helped promote the participation of the employee representatives.

Doubts were expressed, nonetheless, about the Directive's effectiveness, by both the employers and the unions. The CCP service sector employers' association interviewee explained that part of the problem lay with the fact that 90% of Portugal's employers are SMEs:

'In Portugal we always have the eternal problem: we have everything in the law, but then in practice there is absolutely nothing... How to reach the SMEs which are 90% of Portuguese companies? Those who have a reputation and image to promote comply with the law. The others do not comply with anything...that is the problem, and therefore it is urgent to make them aware. Anyway it is the national drama.'

This interviewee did not believe the problem was a lack of information about the new law:

'The labour Inspection participated in this campaign providing information in several languages about ethnic minority rights, labour contracts and the basic legal rules defined by the law. One cannot say that the public authorities did not do their best to give information to protect those persons.'

A respondent from the CGTP trade union confederation was more sceptical:

'Let me put it this way: in Portugal top managers, administration boards, human resources managers, and heads of department are very imaginative... in finding ways to avoid compliance with legal provisions; at the workplace things are quite different... in our country the problem is not the content of the law, the problem is compliance with the law'.

The confederation also identified problems with the legal approach to combating discrimination:

'The major problem is always to substantiate the complaints. Additionally we have a problem in Portugal, because the procedures in court are very slow, and it takes a long time before we get an answer to a case. Sometimes when we get an answer it is too late'.

Another criticism of the transposition came from the UGT, whose interviewee criticised the fact that in Portugal the unions do not have the right to present cases in court on behalf of the victims of discrimination:

'Although trade unions can assist workers legally, they cannot represent them in court (judicial sponsorship). Only the public prosecutor is entitled to do this. Trade unions have always been fighting to have the right to represent the workers in court, but so far we did not succeed.'

Awareness of rights among workers, the CGTP interviewee went on to argue, is associated with whether the worker was a migrant or not, and whether they were working in the large informal sector:

'It is important to say that there are two segments of the immigrant community. Those who are in a regular situation (documented workers in formal economy) are aware and present complains whenever the case is. Among those who are

undocumented or who are in the informal economy there is less knowledge, but even when they are aware they do not complain because they are afraid.'

4. Comments on the Equality Body

The CICDR, i.e. the Portuguese National Equality Body was created following the Law No. 134/99 (August 1999) which prohibits discrimination in the exercise of rights for reasons based on race, colour, nationality or ethnic origin. The CICDR meets periodically, every three months, and in accordance with the law, the representatives are the following: the High Commission for Immigration and Intercultural Dialogue (Alto-Comissariado para a Imigração e Diálogo Intercultural, ACIDI, IP), acting as president; two representatives elected by the Assembly of the Republic; two representatives of the Government, designated by the government departments responsible for employment, solidarity and social security and education; two representatives of immigrant associations; two representatives of anti-racist associations; two representatives of trade union confederations (CGTP and UGT); two representatives of employers' associations (CCP and CIP); two representatives of associations for the defence of human rights; and three persons designated by the remaining members.

All the trade union and employers confederations that take part in the Equality Body were interviewed. As expected, these organisations have a clearer and in depth view of the Equality Body role and practices than the branch trade unions or the employers at the company level.

The CGTP representative was elected to the post and takes part in the Permanent Commission (CP) of the CICDR, the main competence of which is to assess the cases and make suggestions previous to the decision of the High Commission regarding sanctions and penalties. The interviewee from CGTP stressed:

'We have an institutional relation, and we use this space in terms of information, consultation and participation but also as a tool to influence political authorities and we explore fully its potential and competencies.'

The interviewee from the CCP service sector employers' association endorsed this position:

'The Racial Equality Directive and the national legislation have improved protection against racial/ethnic discrimination in employment. The existence of the national law is, in itself, an improvement. Additionally the law called people's attention to behavioural and attitude problems. Finally the important and strong campaigns launched last year reached the population, not only in the large towns but everywhere. Therefore it has been highly positive.'

5. Trade union and employers policies and measures

5.1. Trade union policies and measures

The trade union organisations interviewed had different possibilities and levels of action and competencies. The two trade union confederations CGTP and UGT do not carry out collective bargaining, while FESAT and FEVICOM play a central role on collective bargaining in their respective sectors. The trade union confederations participate in a number of national bodies dealing with labour market policy and anti discrimination issues, while sector trade unions such as FESAT and FEVICOM are not involved in that national framework.

Therefore, the CGTP and UGT are represented at the following bodies:

- Standing Commission for Social Concertation (Comissão Permanente de Concertação Social, CPCS), a tripartite body with a broad range of competencies regarding labour market policies and labour legislation.
- Commission for Equality and Against Racial Discrimination (Comissão para a Igualdade e Contra a Discriminação Racial, CICDR),
- Consultation Council for Immigration Issues (Conselho Consultivo para os Assuntos da Imigração, COCAI).
- Immigration Platform (Plataforma de Imigração) created in 2006.

Both the trade union confederations, the CGTP and UGT argued they had always been active in fighting against racial discrimination. Therefore, they state they did not change substantially their practices because of the Directive, or the national legislation. The UGT interviewee explained:

'The trade unions have always been in the vanguard of the fight for equality and against discrimination. Therefore the directive meets the demands and practices of the trade union movement.'

The CGTP has a number of specific Departments dealing with anti-discrimination issues: the Department on Gender Equality; The Department on Equality and Multi-discrimination; and the Department of Immigration. For this confederation a focus on migrant workers is crucial to its survival, as well as basic to its ideological stance:

'The articulation of these two principles i.e. class and solidarity is crucial... If we had not combined these two principles in the construction and building sector we would not have been able to organise workers, because the large majority are immigrant workers (80% to 95%), while in manufacturing a third of the workers are immigrants.'

It publicised the legal framework and rights arising from the new laws to its members and workers through their system of information and training. The CGTP also studied the legislation and elaborated specific guidelines for information and training, following an approach that combined general information about the law at the national level to the general public and the workers with more specific and detailed information to the trade

union leaders (sector, regional, local) and to paid officials and representatives. In specific situations CGTP translated the information and guidelines into different languages (French, English, Russian and Ukrainian) so that immigrant workers have access to the information. Additionally several meetings were organized all over the country at the local level to discuss the law and its concrete implications with trade union activists in their area of intervention.

The CGTP regional structures have launched campaigns against racism together with other non-union associations and NGOs. The regional structure Union of Lisbon Trade unions (*União dos Sindicatos de Lisboa*) have been organising running races 'Run against Racism' in recent years. The more recent race, the XIV, in 2008, under the motto "Freedom and Democracy towards Equality, that had 500 participants had the support of several organisations, among them, the CGTP youth organisation *Interjovem*, the Anti-Racist Front, the Federation of sports and cultural collectives of the District of Lisbon, the Portuguese Council for Peace and Cooperation, the House of Brazil, the Movement of Democratic Women; the Catholic Workers League, the Movement of Catholic Students, and the Portuguese Association of Disabled (APD). To do sport for tolerance is seen as a healthy way to act jointly and collectively to defend the universal values of humanity, for progress, equality and social justice, against racism and xenophobia.

The UGT has one official responsible for migration issues and another for racial and ethnic discrimination. As part of its campaign, the UGT prepared a model collective agreement (*Contrato tipo para a negociação colectiva*), setting out guidelines in a number of issues, including those related to the fight against discrimination. This is intended to be used by trade union negotiators at collective bargaining rounds. In chapter three, Equality and Non Discrimination, the 'collective agreement model' provides UGT's recommendations on discrimination issues including:

- Rights of information
- Training and discrimination
- Equality and non-discrimination on the grounds of gender
- Equality and non-discrimination on the grounds of reduced capacity disability or chronic disease
- Equality and non-discrimination on the grounds of religion
- Equality and non-discrimination on the grounds of nationality.

The UGT also launched a special training programme on labour relations where equality and discrimination issues are considered.

The hotel and tourism trade union confederation has also introduced anti-discrimination clauses in its recent collective agreements. The FESAHT interviewee publicised the legal framework to its own members, and explained that:

'Additionally we have introduced new norms in recent collective agreements against all types of discrimination (age, sex, sexual orientation, marital status, family situation, reduced capacity for work, disability, chronic illness, nationality, ethnic origin, religion).'

The interviewee considered that there is a slightly positive impact on the levels of recruitment and involvement of minority ethnic workers in the union as a result of its actions. Thus a trade union representing workers in hotels and tourism in the north of Portugal set up a commission to support immigrant workers, and now has immigrant workers on the trade union's executive.

The building trade union federation (FEVICCOM) has also taken up the cases of undocumented workers and cooperates with NGOs to raise migrants and ethnic minorities' awareness of their rights:

'When the employers refuse to provide immigrants with the necessary documentation proving they have been working, we ourselves issued work documents in connection with Portuguese authorities.'

The interviewee explained also that this had led to recruitment, since *'very often the only document they have to prove their condition is the one of trade union membership.'* This federation has not participated in collective bargaining arising from the introduction of the Directive and the national legislation. However in the last global revision, the collective agreement addressed discrimination issues. They set up a rule whereby immigrant workers can accumulate the vacations of two years, to be able to spend two months on their country of origin.

5.2. Employer policies and measures

The level of commitment to anti-discrimination shown by the two employers' confederations interviewed varied. The service sector CCP appeared to have a more developed policy than the manufacturing-based CIP. The CCP interviewee recognised the main problem lay among the irregular, informal employers:

'Mostly the companies that do not comply with the law regarding minority workers are those which are based on "slave" work, that do not pay their taxes, do not pay social security and so on, which are a minority and whose profits are much larger than the profits of other companies. Recently the employers' confederations and business associations publicly denounced these companies, because they are aware that these companies are a threat to the others.'

To make its position clear the CCP's own code of conduct includes fighting against all forms of discrimination, and promoting solidarity, particularly in large and medium-sized companies:

'Where there is social responsibility and which were already working with communities have been implementing specific measures in relation to discrimination. But in very small and micro-companies the message is difficult to pass.'

The interviewee from the manufacturing federation, CIP, did not consider any significant changes had been made as a result of the new laws, nor had there been any additional

awareness-raising training by the Confederation. For his Confederation, this was the responsibility of individual companies, who very frequently would choose to employ Eastern Europeans who were more skilled than many Portuguese. However, information was available on the CIP's website that its members could access.

Portugal Telecom has a Code of Ethics defining objectives and fundamental values and general standards of conduct, including promoting equality of opportunities. The PT interviewee stressed that *'the company is committed to disseminating good practices among providers and all agents with whom it relates, including best practices of non-discrimination'*, and reported that the company collective agreement (*Acordo de Empresa, AE*) signed with the trade unions *'is in itself an important normative on non-discrimination and prohibition of discrimination on basis of any factor'*. However, PT only has an estimated 20 ethnic minority employees out of some 10,000 in Portugal itself.

6. Views on how to tackle discrimination better

According to the hotel and tourism workers trade union federation FESAHT, 'the law could be more advanced in order to promote better information and to include more specific regulations to prevent and punish discrimination'. And the FEVICCOM trade union federation is very sceptical about the capacity of the Racial Equality Directive and national legislation to really improve the protection against racial/ethnic discrimination in employment, because

'What happens with this directive and with many others is that they are implemented because the government is obliged to do so, but after that the mechanisms for law enforcement are not activated'.

According to FEVICCOM:

'Additional measures should promote Labour Inspection resources and capacity to control the implementation of the law.'

Furthermore, there are institutions that should have a pedagogic approach instead of a repressive one, such as the SEF¹

However all the other interviewees considered that the national law was good enough to tackle discrimination. The problem, all the interviewees stressed, is the compliance with the law, a problem they consider is transversal to any kind of legislation in Portugal. Therefore, they highlight the important role and increased means labour inspection should have in this respect.

¹ SEF has the mission to implement the Portuguese policy for immigration and asylum in agreement with the provisions of the Constitution and the Law, and the Government's guidelines. SEF is a security service organised vertically under the Ministry of Home Affairs. It has administrative autonomy and its fundamental objectives within the internal security policy include border control of persons, leave to stay and the activities of foreigners in Portugal, as well as the study, promotion, coordination and execution of measures and actions related to these activities and migratory flows.

A particular issue mentioned by the trade unions refers to change the existing legal procedures in order to give trade unions the right to present cases in court on behalf of the victims of discrimination (judicial sponsorship).

Improving education appears also in first plan as a tool to tackle discrimination better, according to all. And combating informal economy is seen as crucial issue, to tackle discrimination, in particular, in the building and construction sector, as highlighted by CGTP and FEVICCOM trade union organisations but also by the employers' confederation CCP.

The CCP interviewee highlighted the importance of reflecting on and finding new approaches to deal with SMEs in order to promote their awareness. The CGTP respondent stressed the ways of fighting discrimination and the areas one should focus on to promote ethnic integration:

'This principle of class is the basis for the principle of solidarity with and among all groups of workers. Those who are more aware of their rights can help the others in a more fragile position. In particular, the immigrants in Portugal, which are working class communities, are in a very fragile position for different reasons: recent presence in the country; difficulties with the language; dependency of the employers; far away from their families; housing conditions provided by the employers; and very precarious work. Additionally a large proportion is undocumented, what increases their fragility. Therefore the articulation of these two principles i.e. class and solidarity is crucial.'

Working with non-union organisations and NGOs to tackle discrimination and to increase immigrants' awareness of their rights is a recommendation from the FEVICCOM interviewee:

'This type of work is also done by immigrant associations, which they trust more. Some trade unions have been working in articulation with those associations. Some NGOs have a very interesting work on raising public awareness, such as SOS Racism.'

The CGTP confederation has also been increasingly concerned with this approach, which has been adopted as well by some of its regional structures.

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