

POLITICAL EDUCATION AS A STRATEGIC UNION ACTION

FORMAÇÃO SINDICAL COMO AÇÃO ESTRATÉGICA

FORMACIÓN SINDICAL COMO ACCIÓN ESTRATÉGICA



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How to reference this paper:

COSTA, Hélio da; ARRUDA, Lilian Rose. Political education as a strategic union action. **Estudos de Sociologia**, Araraquara, v. 31, n. esp. 1, e026005, 2026. e-ISSN: 1982-4718. DOI: 10.52780/res.v31iesp.1.21085.



| Submitted: 11/04/2026
| Revisions required: 15/04/2026
| Approved: 05/05/2026
| Published: 27/07/2026

Editor: Prof. Dr. Maria Chaves Jardim

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ABSTRACT: This article analyzes the union training policy of the ABC Metalworkers' Union and how, over the years, this policy responded to the needs imposed by changes in the world of work. Since the 1980s, the ABC Metalworkers' Union has prioritized union training in its congress resolutions; the 3rd Congress in 1999 emphasized this practice as a fundamental tool for implementing its organizational strategy. However, the union's training program had to adapt to changing labor dynamics, specifically addressing the productive restructuring launched by sector companies, mainly from the 1990s onward. In this sense, combining workplace organization, collective bargaining, international coordination, and targeted union training helped create the necessary conditions for the union to respond to the challenges imposed by neoliberal capitalism.

KEYWORDS: Union training. Trade union movement. Productive restructuring. Workplace organization. International trade union movement.

RESUMO: Este artigo analisa a política de formação sindical do Sindicato dos Metalúrgicos do ABC e como, no decorrer dos anos, essa política respondeu às necessidades impostas pelas mudanças no mundo do trabalho. Desde a década de 1980 o Sindicato dos Metalúrgicos do ABC colocou a formação sindical como prioridade nas resoluções de seus congressos: o III de 1999 priorizou a prática como ferramenta fundamental para implementar a sua estratégia de organização. A formação do Sindicato, contudo, necessitou acompanhar as mudanças que ocorriam no mundo do trabalho que envolviam o enfrentamento às reestruturações produtivas desencadeadas pelas empresas do setor a partir, sobretudo, da década de 1990. Neste sentido, a combinação de organização no local de trabalho, negociação coletiva, articulação internacional e formação sindical tratando desses temas contribuiu para criar as condições para o sindicato responder aos desafios impostos pelo capitalismo neoliberal.

PALAVRAS-CHAVE: Formação sindical. Movimento sindical. Reestruturação produtiva. Organização no local de trabalho. Movimento sindical internacional.

RESUMEN: Este artículo analiza la política de formación sindical del Sindicato de Metalúrgicos del ABC y cómo, a lo largo de los años, dicha política respondió a las necesidades impuestas por los cambios en el mundo del trabajo. Desde la década de 1980, el Sindicato de Metalúrgicos del ABC priorizó la formación sindical en las resoluciones de sus congresos; el III Congreso de 1999 destacó esta práctica como una herramienta fundamental para implementar su estrategia de organización. Sin embargo, la formación del sindicato tuvo que adaptarse a las transformaciones laborales, enfrentando las reestructuraciones productivas impulsadas por las empresas del sector, principalmente desde la década de 1990. En este sentido, la combinación de organización en el lugar de trabajo, negociación colectiva, articulación internacional y formación sindical sobre estos temas contribuyó a crear las condiciones para que el sindicato respondiera a los desafíos del capitalismo neoliberal.

PALABRAS CLAVE: Formación sindical. Movimiento sindical. Reestructuración productiva. Organización en el lugar de trabajo. Movimiento sindical internacional.

Introduction

“Overcoming the naive curiosity of popular groups through critical curiosity is a fundamental and permanent exercise to be tirelessly experienced. It is an exercise that implies living the dialectical relationship between theory and practice. And living it in such a way that we place ourselves increasingly farther from falling into the populist or grassroots temptation of denying the role of theory, or into the elitist temptation of, by denying practice, making the importance of theory exclusive. One needs the other as we need the air we breathe.”

[Paulo Freire speaking to educators at Cajamar Institute in 1995] (Freire, 2017, p. 378, our translation).

This article seeks to historically analyze the union education policy of Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union] (SMABC) and how, over the years, this policy responded to the needs imposed by changes in the world of work. To this end, relevant literature on the topic was used, as well as in-depth interviews conducted with union leaders of the Sindicato [Union] between 2020 and 2024. The interviews include leaders from different generations, from the one that founded Central Única dos Trabalhadores [Unified Workers' Central] (CUT) in the 1980s to the generation that operates in a very different context in the 2020s.

Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union], especially from the strike cycle of 1978 to 1980 onward, is regarded as one of the largest workers' demonstrations against the military dictatorship and was an important agent in giving a new direction to the political opening articulated by the regime. For the dictatorship, the opening would have to be “slow, gradual, and safe,” in a democratic transition conducted from above, without the political jolts provoked by the demands of the growing popular opposition³.

In the context of strong repression against the union movement, the ABC metalworkers' strikes had as their main objective the establishment of a negotiation process in which employers' unions would effectively take the strikers' demands into account. The 1980 strike, the longest one, lasting 41 days, was defeated economically, but politically it was extremely victorious, projecting the Sindicato [Union] as a reference point for the combative unionism known as “new unionism,” which was emerging on the national scene and raised its main leader, Luiz Inácio da Silva, Lula, as the country's greatest union leader. In several interviews, testimonies, and speeches, Lula recalled the importance of the 41 days of struggle (including

³ We do not wish, however, to downplay the silent (at times, not so silent) work that took place within the factories in the years leading up to the 1980 strike, as noted by Santana (2018), Negro (2004), French (2020), Martins (1994), Humphrey (1982), and Rainho (1980).

the entire strike preparation process) for the growth of union militancy, despite the failure to achieve the demands.

The concrete fact is that no one could withstand 41 days because, in practice, the comrade had to pay for milk, had to pay the electricity bill, had to pay for gas, his wife began asking for bread money, so he began to suffer pressure and could not endure it. But it is funny because in defeat we gained much more without winning economically than when we won economically. This means that money is not what solves the problem of a strike, it is not 5%, it is not 10%; it is what is embedded in a strike in terms of political theory, political knowledge, and political thesis (CUT, 2018, our translation)⁴.

The enthusiasm of the militants and the effervescence that took over the union, even with the frustrating economic outcome, constituted the strike's great political victory, demonstrating the importance of involving union militants in its preparation. They felt co-responsible for its outcome, taking part in picket lines, gathering workers in neighborhoods and at bus stops, and even strengthening already existing social networks (Macedo, 2010). This political gain needed to be channeled into the factories in a more organized way, and this perception was reinforced by the process of factory "downsizing," with mass layoffs beginning in 1982 and productive restructuring in the following years. In this sense, efforts began to establish factory committees and to train their members to face the challenges in the world of work that emerged from the 1980s onward (Barbosa, 2003).

One of the initiatives was the creation of a subsection of *Departamento Intersindical de Estatística e Estudos Socioeconômicos* [Inter-Union Department of Statistics and Socioeconomic Studies] (Dieese) in 1981, led by Osvaldo Cavignato, an economist who had already been performing advisory functions since 1975, supplying union leaders with data for negotiations through research. A few years later, the Sindicato [Union] incorporated production engineers to help understand productive restructuring and, consequently, its negotiation process with the Sindicato [Union] and its educational processes. The Sindicato's [Union's] press, through the newspaper "*Tribuna Metalúrgica*," was always a powerful voice for workers, and cultural actions, such as *Grupo de Teatro Forja* [Forja Theater Group], also joined the effort to organize and raise awareness among the metalworking base (Paranhos, 1999).

⁴ Read the full text of Lula's historic speech in São Bernardo by accessing: <https://www.cut.org.br/noticias/leia-a-integra-do-discurso-historico-de-lula-em-sao-bernardo-20e3>. Accessed on: 18 Mar. 2026.

The Sindicato [Union] also began an intense process of international exchange and solidarity, which deepened over time and became incorporated into its union culture (Magalhães, 2013; Costa, 2022)⁵.

A third effort, no less fundamental, was the structuring of Departamento de Formação [Education Department], which began to develop courses, workshops, and seminars with the objective of training leaders to intervene both inside and outside the factory. This set of actions, composed of research and studies, union exchange, partnerships with research institutions, and the structuring of regular union education courses, constitutes educational processes that train, each in its own way, leaders to face the challenges posed by different conjunctures. Evidently, the experience of struggle is a fundamental aspect of the working class's political education process, and it was no different with the ABC metalworkers. It is from this “making” of the working class that union education presents itself in its integral dimension⁶.

Within the limits of this text, it would be impossible to cover the broad repertoire of union education. In this article, we will focus on the educational activities developed by Departamento de Formação Sindical do SMABC [SMABC Union Education Department] and structured into training courses in different periods to respond to the organizational and political challenges posed to its leadership. Aware that we will be far from doing justice to the full richness of the ABC metalworkers' union education experience, we will initially highlight the legacy of popular education in the dialogues and partnerships established by militants, leaders, and advisors of the Sindicato [Union]; the fine tuning between organizational challenges and education programs; and some aspects of current challenges, which also challenge education.

The legacy of popular education

A close look at the many testimonies that make up the book *A geração que criou a CUT: história contada por quem a faz* [The generation that created CUT: history told by those who made it] (Nascimento *et al.*, 2023) gives us a sense of the awakening of the union movement in the late 1970s and in the following years at the national level, as well as how the strikes in the ABC region of São Paulo influenced that awakening.

⁵ Since the creation of the World Employee Committees at Volkswagen AG and Mercedes-Benz—Daimler AG, the São Bernardo do Campo plants within the ABC Metalworkers' Union have always played a prominent role.

⁶ Silvia Manfredi (1986, p. 22-26), in a pioneering work on trade union education, highlights this set of actions in the educational field combined with struggles both inside and outside the factory as constitutive aspects of a formative process from the workers' perspective.

The nationwide reach of the pastoral organizations enabled circulation and exchange among militants and leaders from several regions of the country, which might have been unlikely had there not been an aggregating center that made such encounters possible, as occurred with the workers' and peasants' organizations led by the Church. The popular education advanced by the pastoral organizations sought to combine a critical reading of reality with transformative praxis in factories, neighborhoods, the countryside, or anywhere militant action could be developed through the "see-judge-act" method, so popular in the 1980s and mentioned by several former leaders as a period of very consistent grassroots education, with courses, seminars, and meetings that proliferated throughout the country in a growing context of political agitation. "It is possible to state that the Catholic left was the path through which popular education, so well-known and debated based on Paulo Freire's theories, reached and decisively influenced union education" (Junior, 2025, p. 11, our translation)⁷.

Heloisa de Souza Martins (1994) provides a rich overview of the work of the workers' pastoral organizations in the ABC region from 1954 to 1975, a period in which the figure of Dom Jorge, "the red bishop," gained prominence in the strikes shortly after the 1964 military coup⁸. French (2024, p. 242, our translation) mentions the protest by Father Rubens Chasseraux in Vila Palmares, Santo André, on September 28, 1966, which called attention to "the world of the dominant minority of this false progress," and continued: "a world of hunger, misery, persecution, beatings, lack of freedom...".

One of the main forms of support that was built was the education of leaders and rank-and-file workers. To this end, the work of several institutions stood out, such as Fundação Casa do Trabalhador [Worker's House Foundation] (FCT), founded in 1978; Federação dos Órgãos para a Assistência Social e Educacional [Federation of Organizations for Social and Educational Assistance] (FASE), founded in 1961; and Centro de Educação Popular [Popular Education Center] (CEPIS), founded in 1977.

Popular education was analyzed from various perspectives in the context of the redemocratization process and the emergence of popular struggles, such as Movimento Contra a Carestia [Movement Against the High Cost of Living], the strikes of the Metalúrgicos do ABC [ABC Metalworkers] and the Metalúrgicos de São Paulo [São Paulo Metalworkers], at

⁷ In 1963, Paulo Freire encountered student movements for Christian renewal, such as the Catholic Student Youth (JEC) and the Catholic University Youth (JUC)—from which leaders like Frei Betto and Betinho would emerge—, as well as with labor movements, specifically the Catholic Working Youth (JOC).

⁸ According to the author, "until the end of 1970, the Church, as a body, sought to maintain its unity, containing the excesses of its members, while simultaneously asserting itself before the State, without giving up a critical stance, particularly regarding human rights violations" (Martins, 1994, p. 221, our translation).

the I Conferência Brasileira de Educação [First Brazilian Conference on Education], held in April 1980 at Pontifícia Universidade Católica de São Paulo [Pontifical Catholic University of São Paulo] (PUC-SP). On that occasion, the experience of popular education in the context of the 1960s was debated, when social movements and unionism gained relevance in relation to the dilemmas of development, as well as the fight against the country's structural inequality, at a time when Brazil was beginning to experience the boom of industrialization and urbanization. In this context of recovering popular education, the perspective emerged of resuming it as an instrument of the popular classes in building democracy and reconfiguring the role of the State as a result of civil society struggles that placed “new subjects on the scene”⁹.

CEPIS, in particular, was very close to the so-called “new unionism,” represented by union oppositions and by some unions, such as the metalworkers of São Bernardo and Diadema. Popular educators with notable involvement in opposition to the military dictatorship stood out in union work, including Frei Betto, Paulo Vannuchi, and Paulo de Tarso. The first two had close ties with the metalworkers of São Bernardo and Diadema (Junior, 2025, p. 12, our translation). CEPIS would later have a strong influence on the pedagogical conception of Instituto Cajamar [Cajamar Institute] (Inca), founded in 1986, which, in addition to having Paulo Freire as patron and president of its Governing Council, relied on the intense collaboration of Pedro Pontual and Frei Betto in its early years.

In addition to CEPIS members, Inca also benefited from the contribution of experienced cadres from the communist resistance to the military dictatorship, especially Wladimir Pomar, a former leader of Partido Comunista do Brasil [Communist Party of Brazil] (PC do B) and a political prisoner, who became a leader of Partido dos Trabalhadores [Workers' Party] and, as Secretary of Education, was appointed to the leadership of Inca from its foundation in 1986¹⁰.

Many union leaders linked to Central Única dos Trabalhadores [Unified Workers' Central] went through Instituto Cajamar [Cajamar Institute] from its foundation onward. Inca was a space of intense exchange among leaders from all over Brazil, from the countryside and the city, and from the public and private sectors. In this way, popular education gradually entered and became part of the training culture of the cadres of new unionism, who saw themselves represented in Central Única dos Trabalhadores [Unified Workers' Central] from

⁹ Several presentations from the First Brazilian Conference on Education were published in the book *A questão política da educação popular* [The Political Question of Popular Education], by Aida Bezerra and Carlos Rodrigues Brandão (1980).

¹⁰ In addition to trade union education, Instituto Cajamar provided political party training and education for social movements. The Landless Workers' Movement (MST) used the Inca facilities to train its cadres until the inauguration of the Florestan Fernandes National School (ENFF) in 2005.

its foundation in August 1983 and who also gave concrete meaning to CUT's class-based conception by bringing together experiences that were so different from the standpoint of work, yet so intensely shared in struggle and political perspective¹¹.

Inca was also the site of many historic events, such as the seminar on "70 years of the experience of building socialism," in 1987, which brought together different generations of socialists. The event included the historic presence of Luiz Carlos Prestes, Apolônio de Carvalho, Jacob Gorender, Fúlvio Abramo, David Capistrano, Marco Aurélio Garcia, Wladimir Pomar, José Dirceu, and Lula himself. Thorny issues for the left, such as the relationship between parties and unions, were debated at Inca among union and party leaders, who addressed delicate and challenging questions in light of the commitment to the principle of union freedom and autonomy that guided new unionism and, in a certain sense, shaped its discourse in opposition to old unionism¹².

Instituto Cajamar [Cajamar Institute] also played a prominent role in formulating and disseminating CUT's national education policy in its early years, until the founding of the Central's organic union schools, which began to dedicate themselves to training CUT cadres in their respective regions¹³. The Formação de Formadores [Training of Trainers] (FF) program was one of the strategic programs for disseminating "CUT education" throughout the country by incorporating Freirean pedagogy with the challenges of union organization based on its values and principles.

In these brief notes, we call attention to the circulation of ideas and experiences that has always permeated the trajectory of new unionism. In this process, we highlight the strong presence of the ABC metalworkers in the collective construction of the principles of union education that would characterize the 1980s and remain present to this day in CUT education forums and in the various spaces where metalworkers are active, whose origins go back to the rich experience of popular education in Latin America, especially from the 1960s onward.

¹¹ Paulo Fontes and Valter Pomar (2021), in a brief and elucidating text, highlight the importance of Inca for the generation that founded the CUT.

¹² Regarding the seminar that addressed the relationship between trade unions and political parties, see the article in the journal published by Inca itself: "Relação Partido – Sindicato [Party-Union Relationship]. Cadernos de Debates 1, May 1988". Among the 47 participants, 7 belonged to the cadres of the ABC metalworkers.

¹³ The first organic school of the CUT was the Escola Sete de Outubro [October Seventh School] in Belo Horizonte (MG), founded in June 1990, followed by the Escola Sindical São Paulo [São Paulo Labor School] in August 1993. The latter operated within the Inca facilities until 1995.

Education, negotiated restructuring, and workplace organizations

We may state that union education has been adopted as a strategic element combined with other spheres of union action, organization, and reflection. For Gaban (2011), union education is part of a tradition developed by the Brazilian union movement throughout the twentieth century, and Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union] is part of that tradition.

Beyond economic and labor issues, the union and workers' movement that emerged among the ABC metalworkers in the late 1970s, and that a few years later would give rise to Central Única dos Trabalhadores [Unified Workers' Central], included among its demands issues related to citizenship rights.

[...] although the immediately visible issue of this movement was the struggle for wage replacement in the second half of 1977, as a result of the 1973 inflation rates, the purpose of union struggle was the right to citizenship. These demands permeated everyday factory life, the neighborhood, the housing question, better living and working conditions, better wages, and also represented the affirmation of a working class that no longer accepted limited citizenship (Rodrigues, 1997, p. 19).

Union education, in this sense, had to address a range of issues that encompassed the struggles of workers. To this end, the III Congresso do Sindicato dos Metalúrgicos do ABC [Third Congress of the ABC Metalworkers' Union], held in 1999, prioritized the practice of union education as a fundamental tool for implementing its new organizational strategy. The III Congress set as priorities for the union "1) defining the axes of action, 2) the policy for training new cadres, and 3) personnel management policy" (Gaban, 2011, p. 58, our translation). Also, according to Gaban (2011), that congress established two axes for the union's education policy: "Union in the factory" and "Union and society."

In its conception, union education among the ABC metalworkers was not detached from union action in the workplace. Called Comissões de Fábrica [Factory Committees], Comissões de Empresa [Company Committees], Comitês de Empresa [Company Committees], Sistema Único de Representação [Unified Representation System] (SUR), and taking different forms from the 1970s onward, as Rodrigues (1991) recalls, these organizations gained space in the discussions of Oposições Sindicais [Union Oppositions], ABC unionism, and later Central Única dos Trabalhadores [Unified Workers' Central].

Also, according to Rodrigues (1991), beyond the organization of committees created to support the strike movements of the late 1970s, workplace organizations became a permanent

and relevant tool of the ABC union movement. At the time, Sindicato dos Metalúrgicos de São Bernardo do Campo e Diadema [Metalworkers' Union of São Bernardo do Campo and Diadema] included workplace organization in the resolutions of its III Congress, held from October 6 to 15, 1978.

In the first half of the 1980s, with the military dictatorship in full decline, workers found in factory committees a way to confront workplace conflicts and the authoritarianism of management. Consequently, during that period, committees multiplied across several categories, especially among metalworkers. Still in the 1980s, in search of stability, many committees became institutionalized through the creation of regulations and statutes.

Since the 1970s, processes of productive restructuring had been unfolding in Brazilian companies. At first, this occurred with the introduction of Círculos de Controle de Qualidade [Quality Control Circles] (CCQs); the second moment lasted from 1984 until the end of the 1990s, when *just-in-time* was introduced; in the third phase, which began in the 1990s, in a context of national currency stabilization and the opening of new markets, “organizational strategies and the adoption of new forms of labor management more compatible with the needs of production flexibility and workers’ involvement with quality and productivity” were introduced (Leite, 2003, p. 71-79, our translation).

Beyond job losses and company closures, the ABC region gradually took on a different configuration. For a leader of Sindicato dos Metalúrgicos do ABC [ABC Metalworkers’ Union], in an interview conducted on June 17, 2020, over the years the ABC region has undergone a process of deindustrialization with several impacts.

It is not only in workers’ everyday lives, but it also has an impact on public revenue. If we take the ICMS here in the ABC region, we went from 9.5 billion in ICMS¹⁴ in 2014 to just over 6 billion in 2019. [...] In five years, we lost more than 3 billion in ICMS revenue. This compromises the entire local structure, so, in fact, we lost. [...] In those five years, we lost more than 4 billion reais in total payroll (Rodrigues, Ramalho; Lima, 2022, p. 35, our translation).

Union responses to confront these processes are diverse because of the different profiles of companies in the sector located in the region: large companies coexist with small and medium-sized ones, with distinct forms of organization, technology, and management. It is necessary to understand the metamorphoses of work in order to face processes of productive restructuring. In this respect, union education is a relevant element, as another leader of

¹⁴ This is a state tax: ICMS (State Value-Added Tax on Services and Circulation of Goods).

Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union] recalls in an interview conducted on September 5, 2024 (Rodrigues, 2025, n.p., our translation):

We have already gone through productive restructuring, which was something that, whether we like it or not, as much as we realize that new forms of work are emerging. But we need to be attentive, right? That is why the Sindicato [Union] here is often attentive to discussing with governments and with the companies themselves, because technology is not something we are going to prevent from happening; in other words, it is already a reality. So, we need to prepare current workers, but also future ones, so that they can keep up with this evolution through education.

In this complex scenario, in the large automakers, the factory committees and company committees play an important role in negotiating the restructuring imposed by companies. In the case of Volkswagen Anchieta, the actions of the workers' Comissão de Fábrica [Factory Committee] were relevant in the face of the changes that occurred internally. Created by the company in 1980, the internal workers' representation began to express opinions on what was happening in the factory and to conduct negotiations from 1982 onward, the year of the first election of representatives, when workers took control of the committee.

During the 1990s, this practice came to be called “negotiated restructuring,” or also “propositional union action,” and it became consolidated in the ABC region of São Paulo in the 2000s. Authors point to the construction of this strategy among the ABC metalworkers: Rodrigues (1999) emphasizes that new unionism was led to discuss the effects of the recession of the 1980s, shifting from conflict-oriented unionism to negotiation-oriented unionism, “that is, as far as possible, a concerted change between capital and labor” (Rodrigues 1999, p. 241, our translation). Blass (2001), in turn, highlights the importance and different trajectories of the Volkswagen Anchieta and Ford committees, both created in the 1980s, but notes the development of a negotiating characteristic on the part of the former.

The case of Volkswagen Anchieta is illustrative: the plant was affected by productive restructuring initiatives starting in the 1990s. In 1997, VW announced 10,000 layoffs and the closure of the Anchieta plant; negotiations between the union and the company, together with international coordination, prevented that outcome. A Programa de Demissão Voluntária [Voluntary Dismissal Program] (PDV) was planned, along with a reformulation of the time bank and, furthermore, the negotiation of the Novo Polo [New Polo] to be manufactured at the plant. In 1998, once again, VW Brasil announced layoffs—10,000 in Brazil and 7,000 at Anchieta—and the Sindicato [Union], together with the Comissão dos Trabalhadores [Workers' Committee], with international support from the German union IG-Metall and the Conselho

Geral dos Trabalhadores [General Workers' Council], negotiated with the company's global management the creation of the 32-hour weekly "Volkswagen week," preventing the layoffs (Costa, 2022, p. 88-90, our translation).

Entering the 2000s, VW do Brasil [VW of Brazil] implemented its restructuring processes based on product focus and the formation of production chains:

Examples include the Consórcio Modular [Modular Consortium], in which the entire transformation activity was outsourced; at Volkswagen/Anchieta, with the production of the "Novo Polo" ["New Polo"], beginning in 2002, part of the production process was outsourced and seven supplier companies set up inside the São Bernardo do Campo plant to produce tires and wheels, door assemblies, wiring harnesses, chassis components, fuel tanks, exhaust systems, and pedal assemblies (Arruda, 2010, p. 9, our translation).

Continuing this process, restructuring at VW was carried out in two phases: Phase I, which included maintaining the "Volkswagen week" in 2001 and the Autovisão Project in 2003; and Phase II, with the Programa de Demissão Voluntária [Voluntary Dismissal Program] of 2006. Representatives of the Comissão de Fábrica [Factory Committee] who followed these phases emphasized that the strategy was to negotiate. For the coordinator of the Comissão de Fábrica [Factory Committee] at the Anchieta unit at the time, in an interview conducted on September 7, 2009, "the best way is for us to negotiate, or else let the factory lay people off and for us to go out into the streets," or, as a member of the Comissão de Fábrica [Factory Committee] expressed in an interview conducted on June 15, 2009, regarding the 2008/2009¹⁵ crisis of capitalism, "Volks is not suffering from the crisis because the restructuring had already been done before, had already been negotiated before" (Arruda, 2010, p. 12, our translation).

However, the practice of negotiation does not exclude other forms of struggle, as the former vice-president of the Comitê Mundial [World Committee] recalled in an interview conducted on March 24, 2008:

So, you begin a negotiation process through negotiation itself, and no longer through a demonstration of strength by one side or the other. Of course, both within the union movement and within the business sector there are still people who have that same understanding, that same conception from back then. But for the most part, today the first aim is to exhaust every possible form of negotiation and, if that negotiation produces a negative result, then yes, you carry out whatever struggle you think should be carried out, that must be carried out. That is the example I just mentioned. We carried out the entire

¹⁵ During the 2008 crisis, small American investors used their properties as collateral for mortgages. Since these investors were unable to repay the loans, the banks collapsed, triggering a worldwide domino effect (Folha de S.Paulo, October 22, 2008).

negotiation process over profit sharing in 2005 at Volkswagen, and we went on strike for 28 days because of a difference of just over 300 reais (Arruda, 2010, p. 86, our translation).

Union education would have to accompany this movement, and this included workplace organization. In an interview conducted on June 25, 2021, a former leader of Sindicato dos Metalúrgicos de São Bernardo do Campo e Diadema [Metalworkers' Union of São Bernardo do Campo and Diadema] and one of the founders of CUT explains the importance of union education addressing everyday life on the shop floor and workplace organization (Nascimento *et al.*, 2021, our translation).

So that is why I am saying this: there was a distance [in education] between the needs of giving strength to union action, to union activity. That distance, you understand? So then, the union did not see itself there, it was not there. So, when I kept discussing OLT¹⁶ to discuss OLT from the standpoint of organization, of the workplace, is one thing; but we have to discuss how we are going to ensure that union representation is guaranteed inside the workplace, as a guarantee. That is the discussion about Organização Local do Trabalho [Workplace Organization].

As already mentioned, Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union] structured its education around two axes: "Union in the factory" and "Union and society"; this implied two lines of education: leadership education and mass education. Gaban (2011) emphasizes that the leadership education line included courses aimed at militants, leaders of the Comitês Sindicais de Empresas [Company Union Committees] (CSEs), Comissões de Fábrica [Factory Committees], SURs, and Comissões Internas de Prevenção de Acidentes [Internal Accident Prevention Committees] (CIPAs). Mass education was aimed at the community through the Sindicato e Cidadania [Union and Citizenship] program, in partnership with Serviço Nacional da Indústria [National Industrial Training Service] (SENAI).

Silvia Gaban (2011) surveyed the resolutions of the 3rd, 4th, 5th, and 6th Congresses of Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union], from 1999 to 2006, and notes that at the 4th Congress, the **emphasized agenda was the consolidation of the CSEs** and the struggle for the Sindicato Nacional [National Union]. Also, according to Gaban (2011), the resolutions of the 6th Congress of 2006 reaffirm education as an indispensable area of SMABC in preparing its leaders for the challenges posed by the union and by society. In this sense, three axes were defined for education:

¹⁶ OLT: Workplace Organization (Organização no Local de Trabalho).

the permanent education of militants and leaders, with courses to raise workers' awareness about participation in the union, **both aimed at consolidating Organização no Local de Trabalho [Workplace Organization] (OLT)** and the union's action in society; the professional education of metalworkers, considering cooperation with other entities; and finally, the education of metalworkers through the "Fundo de formação" [Education Fund] (Gaban, 2011, n.p., emphasis added, our translation).

As Gaban (2001) points out, in the course programs for the 2000-2009 period, the course Organização no Local de Trabalho [Workplace Organization] was included. In addition, the "Union in the Factory" axis unfolded into two core areas: productive restructuring and the new frameworks for action in the factory, including specialization courses in collective bargaining. The other core area was related to action in the workplace (CSE, OLT, grassroots work). Thus, education addressed the relevant issues of the context the Sindicato [Union] was experiencing companies' productive restructuring, the need for negotiation, and the role of workplace organizations in the face of impacts on employment and working conditions.

Including collective bargaining in education courses was not—and still is not—such a simple task. This is also because agreements became more complex with the weakening of collective conventions and the predominance of collective agreements, as explained by a leader of Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union] and Volkswagen employee in an interview conducted on October 14, 2020:

This is already a movement that occurs there at the end of the 2000s up to 2010—2007/2008... No!—2008/2009/2010, that is when it actually materialized. The automakers realized that following what was established by convention, following what was established for everyone, would not give them the flexibility they needed; therefore, the options were created to make agreements by company. And the union movement found itself in a very difficult position because the company announces there, "3,000 layoffs," "2,000 layoffs," and says to the union: "either I lay off this many people or we will produce an agreement on these terms." And then, in the agreement with "these terms"—as the company calls them—there is the PDV¹⁷, there is the increase in the health plan, there is the wage adjustment, there is the maintenance of social clauses or changes to social clauses; therefore, it already makes an agreement specific to itself, outside the global negotiation process, which gradually leads to a weakening. And this is repeated with all the automakers; so Mercedes did it; Volks did it; Scania did it; Toyota did it; Ford—and so on... And when you leave a joint negotiation, you have the smaller ones producing a collective convention (Rodrigues, 2021, p. 315, our translation).

¹⁷ PDV: Voluntary Severance Program (Programa de Demissão Voluntária).

As Gaban (2011) explains, in order to introduce collective bargaining into education courses, still in the 1999-2009 period, within the “Union in the Factory” axis, the pedagogical practice called “challenge-situation”, or “problem-situation” was recovered from popular education. It consisted of a challenge to negotiate a company restructuring proposal: the challenge was presented at the beginning of the course and taken up again at the end. After theoretical discussions on restructuring, the reflections moved through restructuring itself and workplace organization.

Many decisions related to productive restructuring originate at company headquarters. In this sense, international solidarity and joint bargaining among workers became a necessary strategy. The globalized operations of companies required equally globalized actions by unions. Costa (2022) emphasizes that, in addition to Brazil being the first emerging country to receive multinationals in the 1950s and 1960s, many of them established themselves in the ABC region. Within this context, Sindicato dos Metalúrgicos [Metalworkers’ Union] developed a successful international experience of confrontation by combining “thinking globally and acting locally,” thereby managing to establish an international dialogue among workers. The union strategy, however, became increasingly complex and internationalized, as could be observed through the Sindicato’s [Union’s] participation in the Comitês Mundiais de Empresas [World Company Committees].

Dialogue may be mediated by Federações Sindicais Internacionais [International Trade Union Federations] (FSIs), also called Federações Sindicais Globais [Global Union Federations] (FSGs) or Global Unions Federation (GUFs). The international federation that represents the metalworking sector is IndustriALL Global Union, founded in 2012 through the merger of Federação Internacional dos Trabalhadores da Indústria Metalúrgica [International Metalworkers’ Federation] (FITIM), Federação Internacional de Sindicatos de Trabalhadores Químicos, de Energia, de Minas e de Outros Setores [International Federation of Chemical, Energy, Mine and General Workers’ Unions] (ICEM), and Federação Internacional dos Trabalhadores Têxteis, de Vestuário e de Couro [International Textile, Garment and Leather Workers’ Federation] (ITGLWF).

In the metalworking sector, workers organized the world committees of Volkswagen, Mercedes, Scania, General Motors, Ford, among others. The ABC metalworkers actively participated in this movement. Indeed, in June 2002, the VW and Mercedes Committees signed a code of conduct with the companies.

For the ABC metalworkers, this meant refusing the fate of other industrial centers.

The ABC metalworkers refused to accept the outcome experienced by Detroit. They invested in the organization of factory committees, strengthening union organization in the workplace. They invested in hiring technicians and advisors, producing studies and research on the transformations taking place in automakers and auto parts companies. Efforts were also made to **train leaders through union education courses**, in addition to international exchange with other union organizations, especially from Europe (Costa, 2022, p. 84, emphasis added, our translation).

Costa (2022) recalls that, in the case of Volkswagen during the processes triggered in the 2000s, there were intense international exchanges among Brazilian and German union representatives and the company's headquarters. Announcements of employee layoffs originating from headquarters during this period led workers' representatives to seek international cooperation: in 2001, in Germany, in the presence of the president of VW Brasil [VW Brazil] and the secretary-general of Comitê Mundial dos Trabalhadores [World Workers' Committee], Brazilian representatives secured the suspension of around 3,000 layoffs announced by the company.

In 2006, the company announced the elimination of 20,000 jobs worldwide. In that episode, workers coordinated internationally and, in May 2006, organized meetings of Comitê Mundial [World Committee] in Germany and another of Rede Sindical Alemão-Ibero-Americana [German-Ibero-American Union Network] in Puebla, Mexico. In the ABC region, the Sindicato [Union] and the internal workers' representation reached an agreement that renewed the employment stability agreed upon in 2001 and kept the Anchieta unit in operation.

The Volkswagen example helps us see that productive restructuring processes triggered on a global scale involve a complex network of international negotiations among unions, internal representations, Comitê Mundial de Trabalhadores [World Workers' Committee], company headquarters, and subsidiaries. International union relations were not initiatives only of German unions; they were also one of the objectives of the representatives of Comissão de Fábrica [Factory Committee] at the Anchieta unit and functioned as a strategy of resistance and strengthening of union organization. At the same time, Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union] invested in training leaders to understand and deal with the local and global transformations taking place in the world of work.

The neoliberal pandemic

The 2010s would bring new challenges for the working class and, especially, for the ABC metalworkers. The 2017 labor reform and the 2019 social security reform removed rights and shook union organizations. In addition, the ABC metalworking industry experienced the introduction of Industry 4.0 in automakers in 2017¹⁸ and the closure of Ford in 2019.

The structural transformations of capitalism have been causing changes in workers' profiles, which has created further difficulties for union action. Union leaders point to changes among metalworkers: among young people, there is no longer the idea of belonging to a company for the rest of one's working life. This change in profile may be related to the introduction of the flexible accumulation model, in which new generations show little concern for long-term planning of their professional trajectories. Two facts are evident: one is "the end of lifetime employment, the other, the disappearance of careers entirely devoted to a single institution; the same applies, in the public sphere, to the more uncertain and short-term character acquired by government support and social security programs" (Sennett, 2006, p. 30-31).

For the leader of Sindicato dos Metalúrgicos do ABC [ABC Metalworkers' Union], interviewed on June 12, 2024, this change in profile has an impact on union education:

Our Sindicato [Union] is a union that works a great deal on education. We even define this in our congress, what we call "militancy," which is not the union representative, but that person who carries out our militancy inside the factory. So our Sindicato [Union] invests a lot in this, in education. In political education. But when we encounter a generation that already seems to come with different ways of thinking, we see resistance to participating; perhaps many of us participated, but from one generation. These people are leaving, and we often did not realize that we needed new people in these activities, that we needed to bring new people even into the committee itself, which is a difficulty we face. So perhaps part of the blame is ours, indeed. But the generation we see today inside the factory does not have that desire. Perhaps it is a generation with different ways of thinking. I do not know if that could be it (Rodrigues, 2025, our translation).

The perception expressed in the testimony above becomes even more concerning after the 2008 crisis, which marked an increasingly strong partnership between neoliberalism and authoritarianism, creating an extremely inhospitable environment for combative unionism, going beyond the anti-union practices of other authoritarian periods. In its relentless attack on

¹⁸ The 4.0 assembly line inaugurated at Mercedes-Benz was a victory for the Metalworkers' Union following a long period of negotiations from 2013 to 2017, serving as an alternative to preserve the SBC plant, which was under threat of closure. However, the issues stemming from the labor process did not cease to exist. The same occurred at the Volkswagen and Scania plants.

the social-democratic edifice built in the postwar period, weakening unions' bargaining power became central to the war to precarize work and eliminate rights, reviving the experiences of the United States and England in the 1980s, as Streeck (2013)¹⁹ observed. In Brazil, this turning point materialized in the neoliberal reforms mentioned earlier.

Marilena Chauí (2019, n.p., our translation) perceptively observes what has been gestating over recent decades: another face of totalitarianism, neoliberal totalitarianism:

In previous totalitarianisms, the State was the mirror and model of society, that is, they instituted the statization of society: all social and political spheres not only as organizations; neoliberal totalitarianism does the opposite: society becomes the mirror for the State, defining the market as its central reference, as a specific type of organization: the company—the school is a company, the hospital is a company, the cultural center is a company, a church is a company, and, evidently, the State is a company.

As an unfolding of this process, it is worth emphasizing that the conditions for ideological confrontation inside and outside the workplace are increasingly challenging tasks for union leaders. First, there was the resurgence of right-wing and far-right militancy, which performs strongly on social media and has also shown the capacity to occupy the streets. In contrast to class-based, universal, and solidaristic aspirations, values such as entrepreneurship and meritocracy are exalted as the natural path to professional success. The president of Sindicato dos Metalúrgicos [Metalworkers' Union], Moisés Selerges, defined the post-pandemic period as the period of "Retomada" [Resumption] for the Sindicato [Union], reinforced by President Lula's victory in the 2022 elections and by the new leadership of the Sindicato [Union], elected in 2023 in an environment of extreme polarization and many difficulties for workers despite the election results²⁰.

In 2023, the Departamento de Formação [Education Department] took the initiative of conducting a survey with the entire Direção Plena [Full Leadership], newly sworn in, about the main challenges facing the category and how education could help in this process. From there, the idea was to structure a long-term, two-year education plan²¹. As an example, the main

¹⁹ According to the author: "The destruction of the air traffic controllers' union by Ronald Reagan in 1981, and Margaret Thatcher's victory over the miners' union in 1984, constitute dramatic and symbolically important turning points" (Streeck, 2013, n.p., our translation).

²⁰ This resumption means, in a broader sense, the resumption of direct contact with the federal government, of direct dialogue with the working class, of industrial policies for the region, and of popular participation." Moisés Selerges in the editorial of *Tribuna Metalúrgica*, 2023.

²¹ Out of the 155 representatives of the Company Union Committees (CSEs) elected for the 2023–2026 triennium, who constitute the Full Leadership, 125 answered the questionnaire. The research and the resulting course proposal were analyzed by Cappucci et al. (2025, pp. 8-13) from the perspective of Paulo Freire's liberating pedagogy, drawing from the critical branch of social psychology and the experience of the trade union movement.

challenges identified by the 58 survey respondents were the dissemination of *fake news* through social media in everyday factory life, followed by the process of depoliticization of the category, identified by 43 respondents. According to the representatives, these two issues are obstacles to discussing factory problems and the union with workers.

Based on the information provided by the survey, the following axes were indicated for education: the resumption and meaning of workplace organization; and the role of the CSEs as the guiding axis of the education project. In this sense, the political and cultural dimensions should be addressed, as well as union action and transformations in the world of work; union and society; and union and the environment.

What we wish to emphasize by mentioning the survey is SMABC's ongoing effort to ensure that its union education policy is not lost and does not become detached from the organizational demands identified by its own leaders, continuing in permanent dialogue with rank-and-file workers and, in this way, seeking to adjust and reinvent itself, just as union action itself does.

Final considerations

For more than five months, the ABC metalworkers debated the need to advance union organization by rooting union representation in the workplace and expanding the experiences of the Comissões de Fábrica [Factory Committees]. At the category's II Congresso [Second Congress], in 1996, after lengthy debates, the creation of the Comitês Sindicais de Empresas [Company Union Committees] (CSEs) was approved, and they began to be implemented in 1999. According to former Sindicato [Union] president Luiz Marinho, the CSEs "were the third revolution of new unionism,"²² because they broke with the corporate model of representation and deepened union democracy, insofar as all CSE representatives elected in the workplace automatically became members of the Direção Plena do Sindicato [Union's Full Leadership], overcoming the corporate model that legally limited the leadership to 21 members. In this way, the Sindicato [Union] became more present in the daily life of the factory, seeking to solve emerging problems more quickly and strengthening the Sindicato's [Union's] ties with its base, which began to interact permanently with its union representative.

²² For more information, see the interview with Luiz Marinho at: <https://smabc.org.br/comites-sindicais-de-empresa-a-3-revolucao-do-novo-sindicalismo>. Accessed on: 19 Mar. 2026. Luiz Marinho was the president of the Union from 1996 to 2003.

It was no coincidence that, at the category's III Congresso [Third Congress] in 1999, union education gained prominence in view of the enormous task of preparing CSE members to take on the challenge of implementing and consolidating the new “modelo sindical dos metalúrgicos do ABC” [ABC metalworkers' union model]. The structuring and valuing of an education policy by the ABC metalworkers are intrinsically linked to their political-union project of responding to the challenges posed to workers in different conjunctures, in parallel with the renewal of their union cadres.

Even in the face of the changes that have been taking place in the world of work, more than 20 years after the III Congresso [Third Congress] of 1999 defined the axes of union education, the ABC metalworkers have shown the capacity to combine workplace organization, negotiation, international coordination, and the training and structuring of union education programs to confront the difficulties imposed by neoliberal capitalism.

ABC metalworkers' union model] historically overcame the barriers imposed by the corporatist union model by planting its banners inside the factories, first through the Comissões de Fábrica [Factory Committees] and then, from 1999 onward, through the implementation of the Comitês Sindicais de Empresas [Company Union Committees], which are elected in their workplaces, reaffirming the democratic principle: anyone who is not elected in their workplace cannot belong to the union leadership. It is this commitment to rooting itself in the rank and file and to a project of transformation, pointing toward the renewal and improvement of union action, that gives meaning to the long trajectory of union education among the ABC metalworkers.

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CRediT Author Statement

- ☐ **Acknowledgements:** None.
 - ☐ **Funding:** This research received no external funding.
 - ☐ **Conflicts of interest:** The authors declare no conflicts of interest.
 - ☐ **Ethical approval:** Not applicable.
 - ☐ **Data and material availability:** Not applicable.
 - ☐ **Authors' contributions:** Both authors contributed equally to this work.
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Processing and editing: Editora Ibero-Americana de Educação
Proofreading, formatting, normalization and translation

