

# The social production of the organization of the public bus system in Porto Alegre — 2012-14

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This paper analyses the social production of the public bus service in Porto Alegre, taking the Theory of Social Production (TSP) by Carlos Matus as reference. TSP explains how social reality is produced by actors acting under certain conditions and restrictions. Secondary data is interpretatively analyzed using categories from TSP. Considering social facts that resulted in accumulations and changes to the rules of the game, as well as the social actors involved, their motivations and the resources they mobilize, the study demonstrates the relevance of the Public Transport Struggle Front in the process of social production under analysis. It also highlights the contributions of TSP in the analysis of public policies as part of a process of interaction between social actors, located both within and outside the State apparatus.

**Keywords:** theory of social production; public transport; Porto Alegre; Carlos Matus; Public Transport Struggle Front.

## A produção social da organização do transporte coletivo urbano rodoviário de Porto Alegre — 2012-14

Este artigo analisa a produção social do transporte coletivo urbano rodoviário de Porto Alegre tendo como referência a Teoria da Produção Social (TSP) proposta por Carlos Matus, que explica como a realidade social é produzida por atores que atuam sob condicionamentos e restrições. O estudo analisa interpretativamente dados secundários a partir das categorias da TSP. Considerando os fatos sociais que resultaram em acumulações e na alteração da regra do jogo, bem como os atores sociais envolvidos, sua motivação e recursos que mobilizam, evidencia-se a relevância das ações do Bloco de Lutas pelo Transporte Público no processo de produção social analisado. Destaca-se, também, as contribuições da TSP para analisar as políticas públicas como parte de um processo de interação entre atores sociais, localizados no aparelho de Estado e fora dele.

**Palavras-chave:** teoria da produção social; transporte público; Porto Alegre; Carlos Matus; Bloco de Lutas pelo Transporte Público.

## La producción social de la organización del transporte urbano por autobuses de Porto Alegre — 2012-14

Ese artículo analiza la producción social del transporte colectivo urbano por autobuses en Porto Alegre tomando como referencia la Teoría de la Producción Social (TSP) propuesta por Carlos Matus, que explica como la realidad social es producida por actores que actúan bajo condicionamientos y restricciones. El estudio analiza interpretativamente datos secundarios a partir de las categorías de la TSP. Considerando los hechos sociales que resultaran en acumulaciones y en la alteración de la regla del juego, así como los actores involucrados, sus motivaciones y los recursos que movilizan, el trabajo evidencia la relevancia de las acciones del Bloque de Luchas por el Transporte Público en el proceso de producción social analizado. Destaca, también, las contribuciones de la TSP para analizar políticas públicas como parte de un proceso de interacción entre actores sociales, localizados en el aparato del Estado y fuera de él.

**Palabras-clave:** teoría de la producción social; transporte público; Porto Alegre; Carlos Matus; Bloque de Luchas por el Transporte Público.

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## 1. INTRODUCTION

The Theory of Social Production (TSP), developed by Carlos Matus (1997), explains how social reality is produced by social actors with projects and capacities that act under certain conditions and constraints. It is a procedural approach in which the central reference is action in situations of shared power. Although formulated as a support for a planning method (Strategic Situational Planning), TSP has been used by a few authors as a tool for analyzing public policies (see, e.g., Misoczky, 2002; Rosa Filho, 2007; Costa and Goulart, 2011).<sup>1</sup> This same path was taken in the study from which this article originated. Our objective was to analyze the production of the social actors involved in the dispute over the organization of the public bus system in Porto Alegre.

As of 2012, the *Bloco de Lutas Pelo Transporte Público* (the Public Transport Struggle Front, hereafter referred to as the *Bloco*) produced a series of events that had repercussions in the organization of the public bus system. The *Bloco* is “composed of several organizations united in the fight against fare increases and for a popular public transport system of quality in Porto Alegre” (Bloco de Lutas Pelo Transporte Público, 2014a). As will be seen in the process analyzed here, the *Bloco* proved itself to be a relevant actor, introducing onto the public agenda the issue of the organization of public bus system and the problems related to the how the fare is calculated, the lack of contracts, the absence of a bidding process for the concession, user participation, service quality and the profit margin of the companies involved. The year 2014 ended with an impasse in the bidding process for the public bus system concession and a tendency towards disorganization within the *Bloco*. For these reasons, the period selected for analysis was 2012-14. The criterion adopted when selecting the main facts of the period was their significance within the social game. We follow Matus’s (1996) proposition that the analogy with a game is possible because “social reality constantly shows how individuals and organizations struggle to open their own paths, pursuing goals that are sometimes complementary and at other times in conflict with those of others” (Matus, 1996:31).

While recognizing this research may be subject to criticism because only one author is used as a reference, we argue that an additional contribution of this research is that it draws the attention of scholars to the existence and quality of the work of this Latin American author who dedicated himself to analyzing public administration and government considering the particularities of the regional socio-economic-historical formations, while defending the need for planning methodologies that correspond to the specificities of such organizations.<sup>2</sup>

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<sup>1</sup> There are other instances of the application of Carlos Matus’s theory in the Brazilian context, as we found in a research carried out in the *Portal Periódicos Capes*. The publications to which we refer are: Soares and Silva (2011); Alves (2008); Vasquez and Prado (2013); Chrispino, Bayma and Rezende (2014); Mattos (2010); Rivera (2011); Kopf and Hortale (2005); Dias and partners (2012); Santana and partners (2014); Lana and Gomes (1996); Adriano and partners (2000); Tonini (2005); Vieira (2012); Roesse (2012); Andretich (2008); Gonçalves and Placo (2007); Dias (2002) and Echeverria (2004); El-Warrak (2008); Carazzato (2000) and Spinelli (2012).

<sup>2</sup> In recent years his ideas have been used in consulting activities by nongovernmental organizations in several Latin American countries (including Brazil) that syncretise Matus’s propositions with managerial ideas. Such propositions depart from the epistemological and political foundations of the author’s work, although they are very attractive from a marketing perspective. We also disregard interpretations that unjustifiably define him as a postmodernist author (Fortis, 2010).

The term ‘organization’ is used in the procedural sense of ‘the act of organizing.’ Therefore, we do not refer to the structure of the sector or the bus lines offered, but rather to the social dynamics that define the characteristics of this public policy as an undetermined synthesis of the relations among social actors.

Below, there is a brief presentation of TSP. That is followed by items containing information about the procedures adopted in the research; information about the basic rule in force in early 2012 and the social actors that produced social facts in the period covered; an analysis of those facts, the motivations and the resources used by the actors; a synthesis of the relations of cooperation and conflict established in the flow of production; and finally, the conclusions.

## 2. THE THEORY OF SOCIAL PRODUCTION

Carlos Matus, a Chilean, and a Government Minister under Allende and Economic Commission for Latin America and the Caribbean (Eclac) consultant, developed a theory of the process of social production carried out by social actors upon which to base his planning method. This theoretical proposition has great potential for use in the analysis of the production of public policies, assuming it to be a dynamic and conflicting process, which breaks with the usual structuralist and compartmentalizing approach. In addition, it allows us to understand situations in which social actors deprived of power resources originating from, or legitimized by the state apparatus, decisively influence events.

To better understand this theoretical reference in a synthetic presentation, such as that which follows, we begin with the concept of the social actor that refers to the valorization of action and the refusal of the existence of mere “agents reduced to reactive and mechanical behaviors,” as are found in structuralist interpretations. The actors are “the engines of change,” those who “declare dissatisfaction, who process or ignore theories that purport to understand the reality in which they live; accumulate desires, values, prejudices, ideologies, the power to change and capacities.” They are those who “create differentiated visions,” who “rebel against the avoidable and generate conflict,” who strive for power and rule in the private space of their domains.” Moreover, “they are the carriers and sometimes creators of ideas” (Matus, 1996:203). In the definition that we adopt, the social actor, to be analyzed as such, must meet certain requirements: (a) to act creatively; (b) have a project that guides its action, “even if it is inconsistent, erratic or partial”; (c) control a relevant part of the critical resources of the game in which he is interested and thus “have the strength and capacity to accumulate or de-cumulate force and therefore to produce social facts”; (d) participate in the game, “not merely as an analyst or observer”; (e) have an organization “that allows it to act with the weight of a reasonably coherent collective” or, in the case of it being a personality, with a “stable presence” which attracts, with his/her ideas, a social collective”; and (e) be “a producer of spoken acts and moves” (Matus, 1996:204).

The social production process, in turn, is “a network of historical human practices through which human beings, from their biological state, become people and actors,” [...] “in this process people and actors are both products and producers” (Matus, 2005:275).

The facts and things “are a creation not only because they constitute events and objects produced through human effort, but also because we believe that they exist and, by virtue of a social agreement, they are useful to us in the social game” (Matus, 2005:2720). Put briefly: (a) “all the functions of the objects that compose the world are assigned or imposed” by human beings; (b) some assigned func-

tions are created for the use that humans attribute them; (c) some functions, such as the physiological ones, are natural; (d) some, such as language, are of a special kind that symbolize and represent; (e) “collective facts constitute the production of institutions”; (f) “organized collective facts constitute the production of organizations” (Matus, 2005:278). The reference to support these propositions is found in the work of Searle (1995)<sup>3</sup> in search of the ontology that underlies daily social relations. To this end, he analyzes special objects, powers, functions, events, states and relations that belong to the sphere of institutions. His conclusion, in contrast to the concept of collective action of methodological individualism, is that all social and institutional reality can be explained through three notions: the attribution of functions; collective intentionality; and constitutive rules.

Matus (2005), borrowing from Searle’s work (1995), emphasizes that the rules, besides being a social product, are a space for possibilities within which each actor can guide their action in relation to the others. Among them, there is a kind of hierarchy: (a) macro-constitutive rules define norms that ensure a minimum of freedom and a minimum of equality, among those minimums there is space for ideological regulation; (b) the constitutive rules create institutions and organizations; and (c) the regulatory rules govern the activities of the two previous rules. Consequently, social production is carried out in the “competition between unequals” and is subject “to rules which, by their cumulative historical character, while preventing chaos in the process, serve to regulate the advantages acquired by some to the detriment of others”. That is, “the rules of the game are unequal” and “the freedom of the players” is “wider or narrower according to the initial inequalities enshrined and tolerated by the rules of the social game” (Matus, 2005:281).

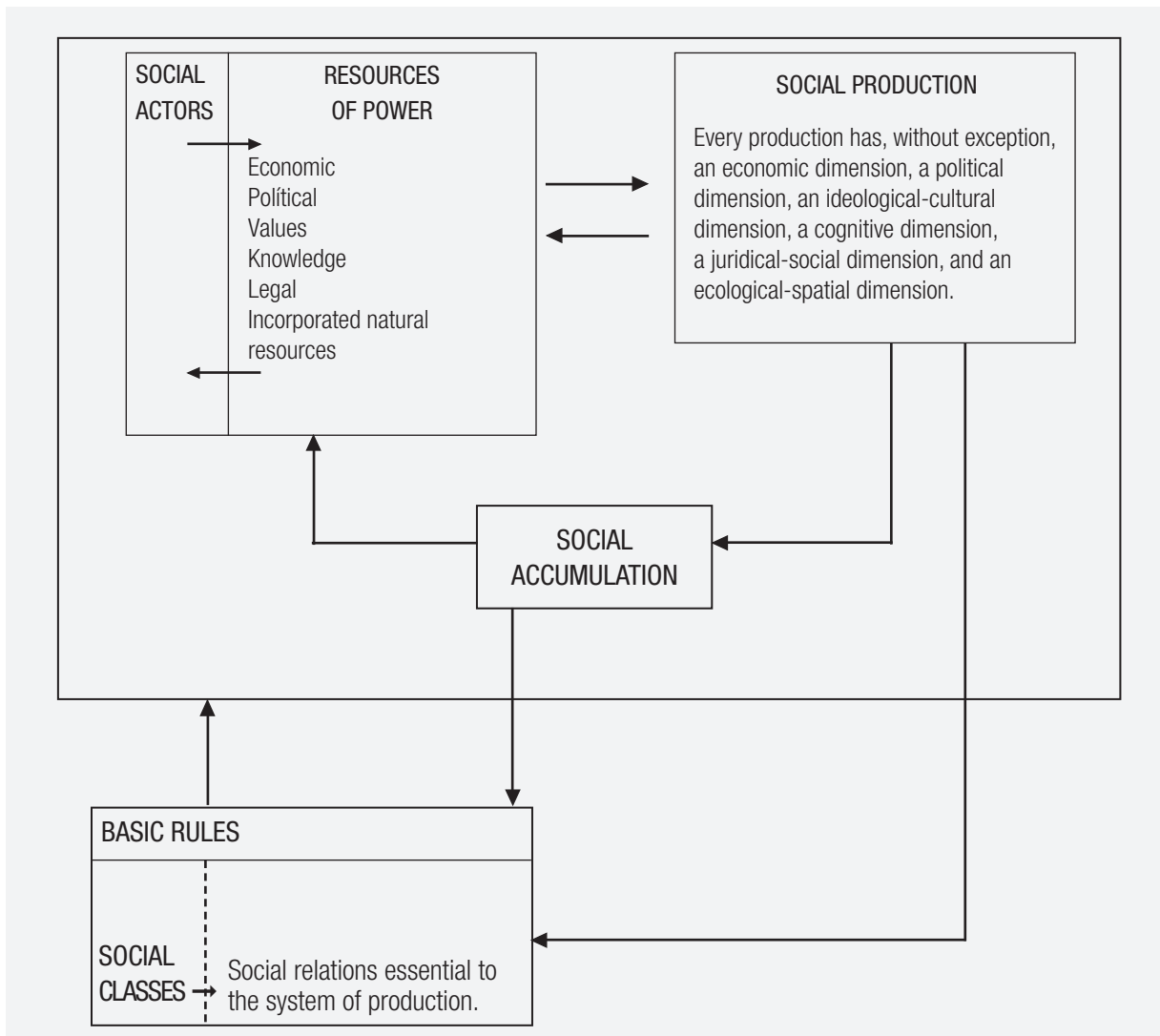
Social production corresponds to a circuit (figure 1) in which all action taken by a social actor inevitably presupposes the use of critical resources for that which is in dispute. The types of resources can be classified, *a priori*, into: political resources; economic resources; accumulated values; accumulated knowledge; and organizational resources. As social relations include creative action, in each production process there will be critical resources consistent with that process, and therefore other resources may be identified as relevant to the dispute and thus to the analysis. In the circuit, social production reverts to the actor-producer in the form of the social accumulation (or decumulation) of new resources or capacities for action (Matus, 2005: 283).

In the social game, an actor’s action corresponds to his capacities (the critical resources that he controls) and his motivation, defined as the convergence between interest and value. Interest represents the intention or the purpose, and is analyzed in each move based on three possible positions: support (+); rejection (-); indifference (0). In turn, the value considers the importance the actor confers in view of the objectives he pursues: Very High (VH); High (H); Average (A); Low (L); and Very Low (VL). Thus, by analyzing the positions of each actor, we can interpret their motivation (Matus, 2005). However, in the analysis of a particular game, these definitions are only accurate when associated with different degrees of open or hidden support or rejection. Transparent positions assume an open interest and indicate the actor’s intention. Disguised positions express a hidden interest and there is a certain difference between what is stated and what is actually done, because “hiding or manifesting positions sincerely is a resource within the social game” (Matus, 2005:374).

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<sup>3</sup> Searle further refined this ontology in book published in 2010, after the death of Matus (1998). That is why we do not use it in the text, but we include it in the references to facilitate the access of those interested.

**FIGURE 1** THEORY OF SOCIAL PRODUCTION



Source: Adapted from Matus (1993:110).

Each move produces a new accumulation or decumulation of critical resources, as previously mentioned. “Each move requires certain capacities and its execution results in change to those capacities” and, therefore, as the social game is being played there is “a process of differentiation between the players and the situation within the game is altered”. Of course, “at each moment, the state of the game represents different situations for the different players” (Matus, 2005:286). In the interactive game, cooperation and confrontation are two extreme poles, which is not to say that in a conflictive relationship between social actors there can be no forms of cooperation to achieve partial results that provide gains for both.

However, it is not enough to be motivated and have capacities to act. In fact, strength is needed. An actor’s strength consists of a complex variety of characteristics: (a) it is multidimensional; (b) it is not defined by the nature of the resource, but by the circumstance of its use; (c) its value is relative to the

objective of the action and the situation of the actor; (d) it is the product of social accumulation and derives from political efficiency in the social game; (e) it always has vulnerabilities; (f) “it is an installed or accumulated capacity that is used in a calculated and selective manner, according to its effective field of application, and according to the pressure required to produce a favorable result” (Matus, 1996:141).

It is also important to clarify the relationship between power, strength and pressure. For Matus (1996:137), power lies in the inequality in the rules of the game, the strength in the production capacity accumulated within the space allowed by rules,” and pressure or applied strength is the flow of production of social facts. The author articulates this relationship with the theme of social change, stating that it is produced “when those favored by power do not have the capacity to transform it into force, and those who have little power take full advantage of that capacity, to convert it into growing force” (Matus, 1996:137).

To conclude this brief presentation of TSP, we summarize the concepts that will be considered in the analysis of the organization of the bus service/urban bus transport in Porto Alegre in the period 2012-14: (a) social actor — “creative player, not subject to routine and stable conduct”, with capacities and motivations, and with objectives in the game; (b) social facts, plays or flows — actions performed by the actors, expression of the dynamics of the game; (c) accumulations — “indicate the resources that characterize the social actors and the production capacities created in the course of the game” that are used by them; (d) rules of the game — “determine the range of possible varieties” of accumulations and social facts (Matus, 2005:282).

### 3. METHODOLOGICAL PROCEDURES

The secondary data was collected through bibliographic and internet-based research. Newspapers, books, magazines, newsletters, individual publications, essays and theses were consulted in addition to material made available in oral (radio, recordings) and audiovisual (films, videos, television) forms. In accordance with the research objectives, information was collected on the organization of the public bus system in Porto Alegre: how it is planned, operated, monitored and who are responsible at each stage; as well as on the social movements, mobilizations and popular acts carried out in relation to the theme.

The main bibliographic source was the written press. The choice of corporate media communication vehicles followed the following criteria: (a) largest circulation — according to the *Instituto Verificador de Circulação* (IVC) (Circulation Verification Institute); (b) widest distribution — corresponding to the geographical area of distribution of the printed newspaper (in this case, we only considered Porto Alegre); (c) influence — ability to influence readers through the opinions expressed and published information; (d) possibility of accessing the collection — availability for consultation in printed or digital format. For the selection of alternative media sources, item (a) was replaced by the criterion of conveying the interests of specific actors in relation to the disputed issue. The application of these criteria resulted in the selection of the newspapers *Zero Hora*, *Correio do Povo* and *Jornalismo B*. The registered period was from January to March 2012 and from January 2013 to September 2014, corresponding to the months in which the theme was most present in the news.

*Zero Hora*, a newspaper maintained by the RBS Group (affiliated to the *Organizações Globo*), was selected as the most widely circulated print media in Porto Alegre, according to the Latin American Advertising Association (the Portuguese acronym is Alap). A direct search was made in the collection, guided by an official from the newspaper’s Documentation and Information Center. Several

combinations of keywords were used in the search box: demonstration, fare, increase, bus, protest, students, vandalism, confrontation, *Bloco de Luta*, Porto Alegre City Hall and Public Enterprise of Collective Transport (the Portuguese acronym is EPTC). The material was made available in digital format upon payment of a fee. A search was also conducted in the online collection, through the portals clicrbs.com.br and g1.globo.com/rs.

The *Correio do Povo* belongs to Rede Record and, according to Alap, occupies the third place in the ranking of circulation in Porto Alegre. The second place is occupied by newspaper *Diário Gaúcho*, which also belongs to the RBS Group. Therefore, it was decided to consult the *Correio do Povo*. In this case, it was sufficient to do so through the portal correiodopovo.com.br, because the materials are fully there. The tool made it possible to search using keywords and the date of publication.

*Jornalismo B* presents itself as an alternative media, whose “fundamental agenda is to strengthen the alternative media and to struggle for democracy in communication, with the right to have a voice extended to the entire population, ending the discursive monopoly exercised by only eleven families throughout the country” (Jornalismo B, 2014). According to the Public Transport Struggle Front (*Bloco de Lutas pelo Transporte Público*), being open to alternative media is a form of resistance to monopoly and a form of democratization of the media (The occupation..., 2013). The printed editions are published every fortnight with the main reports, while the site is updated daily. The search was conducted through the portal jornalismoB.com, with the same keywords used in the *Zero Hora* search system.

Material available on the websites, blogs and social networks pages (Facebook and Twitter) of the actors involved were also consulted.

In addition to written information, photographs were also used as research sources, enabling the reconstitution of the environment and slogans at rallies, assemblies and other public events. Another source was the film “*Morar na Casa do Povo*” (Living in the House of the People), produced by militants belonging to the *Bloco*.

Having collected the material, it was subjected to a critical examination to detect any gaps or errors. The organizational phase involved cataloging the main events that occurred in the period. Due to the large number of recorded events, to facilitate the analysis, the facts and events related to the organization of the public transport in Porto Alegre were listed in chronological order. The observed and cataloged events were then interpreted based on the concepts that make up the TSP, as shown below.

#### 4. THE BASIC RULES AND THE SOCIAL ACTORS THAT PRODUCED SOCIAL FACTS IN 2012-14

In Porto Alegre, in 2012, the bus system was operated by the *Companhia Carris*, a joint-stock company with Porto Alegre City Hall (*Prefeitura Municipal de Porto Alegre — PMPA*) and by twelve companies organized in three consortiums that serve the south, north and east of the city. The operation of vehicles with wooden superstructures fitted onto the chassis of small trucks with a capacity for about 20 passengers was authorized in the 1920s. Since then, until the facts that will be described later, no contract was ever signed between the PMPA and the companies providing the service; the concession had never been put out to tender; and the permission to execute the service by private entities was authorized based on municipal decrees (EPTC, 2012).

Until 2012, the organization of the public bus system was not on the public agenda in Porto Alegre, with the scenario consolidated and repetitive practices. At each beginning of the year, the entities

representing the companies — the *Associação dos Transportadores de Passageiros* (ATP) (Association of Passenger Carriers) and the *Sindicato das Empresas de Ônibus de Porto Alegre* (Seopa) (Association of Bus Companies of Porto Alegre) — filed a request to adjust the value of the fares; The calculation was made by the *Empresa Pública de Transporte e Circulação* (EPTC) (Public Transport and Circulation Company) — responsible for planning, controlling and regulating traffic and transportation in Porto Alegre; the new value was sent to the *Conselho Municipal de Transportes Urbanos* (Comtu) (Municipal Council of Urban Transportation) — “responsible for controlling the quality of services and overseeing the acts of the other members of the Municipal Government, as far as public transport is concerned. Following its approval, the proposed fare increase was sent for sanctioning by the Mayor. It should be noted that Comtu is made up of 21 members that represent, for the most part, governmental and business organizations, as only four organizations can be considered representatives of the users (the Unified Workers’ Central — *Central Única dos Trabalhadores* (CUT), Metropolitan Union of Secondary Students of Porto Alegre — *União Metropolitana dos Estudantes Secundaristas de Porto Alegre*, Porto Alegre Union of Residents Associations — *União das Associações de Moradores de Porto Alegre*, and the Retired Pensioners Federation of Rio Grande do Sul — *Federação dos Trabalhadores Aposentados Pensionistas do Rio Grande do Sul*. One member represents workers in the sector: The Union of Public Transport Companies Workers of Porto Alegre — *Sindicato dos Trabalhadores em Empresas de Transporte Coletivo de Porto Alegre* (Porto Alegre, 1994).

Until 2012, the basic rule expressed a tacit agreement between the municipal administration and the companies, with the users and general population being excluded from its terms. In 2012, as mentioned at the beginning of this paper, the *Bloco* introduced the theme of the organization of public transport and several related problems onto the public agenda.

The analysis of the disputes led to the identification of the other social actors that produced facts in this process, in addition to the PMPA, EPTC, Comtu, ATP, Seopa and the *Bloco*. With the increasing demands made by the *Bloco* which questioned how the fare was calculated, and the ever more explicit involvement between public authorities and businessmen; two other actors became relevant, the *Tribunal de Contas do Estado* (TCE) and the *Ministério Público de Contas* (MPC) (Public Ministry of Accounts). In that context, the Socialism and Freedom Party (PSOL), through its two city councilors, produced an important fact by obtaining a court injunction, revoking the fare increase in 2013. The Porto Alegre City Council Chamber, besides being occupied by the *Bloco* in 2013, has key attributions to the theme. The public transport workers organized stoppages, strikes and protests. Initially, the newspaper *Zero Hora* (ZH) was only considered a source of information. However, when collecting the information, it became evident its open position in support of the interests of the sector’s entrepreneurs. Therefore, it turned out to be considered a social actor.

In the section that follows, we present the social facts produced in 2012-2014, selected because, during their course, they produced accumulations and also resulted in alterations to the basic rule.

## 5. SOCIAL FACTS AND THE ACTORS’ MOTIVATIONS — 2012-14

The social facts are presented synthetically. The motivation of each actor in relation to the facts is analyzed according to the recommendations of TSP. Figure 2 illustrates how the analytical synthesis of the actors’ motivations was made in relation to all the facts considered. In this article, we chose



to make this synthesis in the form of text immediately following the description of the fact. Due to lack of space, we cannot transcribe the information on which the analysis is based, instead it is only possible to indicate the events and declarations that support them.

### 5.1 MOBILIZATIONS IN THE FIRST QUARTER OF 2012

On January 26<sup>th</sup>, 2012 Seopa filed a request for a readjustment of 9.25% in the value of the bus fare - from R\$2.70 to R\$2.95. The amount sanctioned was R\$2.85, justified on the basis of the salary increase granted to public transport workers and the reduction in the Passenger Ratio per Kilometer (the Portuguese acronym is IPK). At that moment, among the state capitals, Porto Alegre had the third most expensive bus fare in the country (Passagem..., 2012). Five street demonstrations were organized by the *Bloco*, with emphasis on that which took place on the day the fare increase entered into effect (6/2) and the most expressive of 2012, held on February 27<sup>th</sup>, when the first acts defined as vandalism were reported, and clashes occurred between protesters and the Military Brigade (*Brigada Militar* — BM) (Protestos..., 2012). ZH published few reports related to the fare increase, but rather focused on vandalism.

Chart 1 shows the social actors involved, their interests, the degree of interest and the value attributed to mobilizations.

**CHART 1** ACTORS' MOTIVATIONS RELATION TO THE MOBILIZATIONS IN 2012

Social actors	Interest	Degree of interest	Value
ATP	+	Open	VH
Seopa	+	Open	VH
PMPA	+	Open	H
EPTC	+	Open	VH
Comtu	+	Open	VH
Bloco	-	Open	VH
TCE	0	Hidden	A
MPC	0	Hidden	A
PSOL	-	Open	VH
Chamber	0	Hidden	VL
Public Transport Workers	0	Hidden	L
ZH	+	Open	H

Source: Elaborated by the authors.

## 5.2 FARE INCREASE IN 2013

On January 3<sup>rd</sup>, 2013, even before the request to readjust the fare was filed, the MPC sent a precautionary measure to the TCE to prevent further fare increases until the maintenance costs of the reserve fleet were excluded from the calculation and the reduction in the social security contribution rate on payroll were included. Despite that, on February 16<sup>th</sup>, Seopa and ATP requested a readjustment of 15.8%, (Companies..., 2013a). Two days later, hundreds of demonstrators organized by the *Bloco* protested supported by Public Transport Workers who organized a go-slow operation (Passagem..., 2013) in support of their wage claim. Even so, at the end of the month, Comtu approved the requested increase by 17 votes to 1, which was immediately announced by the Mayor, setting the value of the ticket at R\$ 3.05.

Regarding the motivation of the actors who supported the fare increase, there is no difference from what happened in 2012: PMPA, EPTC, Comtu, ATP and Seopa continued to express open interest and very high value. However, the rejection presented a change due to the entry onto the scene of two new actors who opposed the fare increase with very high value /whose opposition to the fare increase was very high: the TCE and MPC. The public transport workers adopted an open position contrary to that of the entrepreneurs, strengthening the movement on the streets, but with a value that was only high. The *Bloco*, TCE, MPC and PSOL opposed the increase, with open interest and a very high value. The City councilors remained indifferent and ZH with a hidden interest and high value.

## 5.3 LEGAL INJUNCTION

The street demonstrations were not enough to reduce the fares. However, councilors from the PSOL filed an injunction on April 3<sup>rd</sup> and, based on the arguments that the contract had not been put to tender and the findings of the report conducted by the MPC, obtained an injunction requiring the increase be revoked (PSOL..., 2013). According to the Judge, who emphasized the popular clamor for fare reductions, there were “strong signs of abuse in the fare increase” (Reduction..., 2013). The fare returned to R\$ 2.85. The decision was announced shortly before a demonstration on April 4<sup>th</sup>, and was celebrated in front of the City Hall. Even while celebrating, the *Bloco* declared that it would remain on the streets until the value of the fare was cut R\$ 2.60, with the withdrawal of the cost of maintaining the reserve fleet being removed from the calculation (Manifestantes..., 2013).

The President of the ATP warned the population of the decrease in the quality of the service. The EPTC stated that the value of the fare was insufficient to cover the costs (Liminar..., 2013). That is, the actors who cooperated in rejecting the revised fare were the representatives of the entrepreneurs (ATP and Seopa) and the Local Government. ZH supported the entrepreneurs and the PMPA regarding the need to review the court decision, by reporting information on fare exemptions, fleet renewal, payroll and the profit margin of the companies, implying the fare increase was indispensable. These reports revealed the position that was previously hidden in the news at the beginning of the year, when the fare increase was considered a failure to comply with the demands of the inspection agencies.

Thus, the interest of the ATP and Seopa in opposing the injunction was open and of very high value; that of the PMPA and EPTC was open and with high value; Comtu's was open and with an average value; ZH's interest was open and expressed a very high value. The interest of the *Bloco* and

the PSOL in supporting the injunction was open, with a value very high; that of the TCE and the MPC was hidden, with a value high. The motivation of the Chamber remained indifferent and the interest of the public transport workers was open, with a very low value.

#### 5.4 DEMONSTRATIONS AFTER THE FARE REDUCTION

The fare reduction and its relationship with the *Bloco's* struggle served as an inspiration for other movements. In São Paulo, for example, at the beginning of the emblematic days of 2013 demonstrators raised a banner with the phrase “Let’s repeat Porto Alegre” (Porto..., 2013:29). In June, in Porto Alegre, about 20 thousand people attended one of the biggest protests because, even with the reduction in fares, there was a risk the injunction would be suspended. The actors’ motivations in relation to the demonstrations were similar to that of the previous social fact, with the only change being in that of ZH, which started to express open interest, with a very high value.

The *Bloco's* ability to resume the leading role of the movement and the transport issue in the context of the June Journeys is a characteristic of the social production that took place in Porto Alegre. The list of social facts that occurred until the end of 2014 shows this protagonism and the continuity of the mobilizations.

#### 5.5 THE ENTREPRENEURS’ RESOURCES

The ATP issued a statement claiming losses of R\$20 million and accusing groups with electoral interests of encouraging the protests and the use of violence, depredation and affront against a legally defined fare. Protesters and city councilors from the PSOL publicly repudiated the ATP statement. On July 27<sup>th</sup>, the ATP entered court against EPTC to challenge the position of the TCE (Empresas..., 2013b) and demand compensation for the accumulated loss of R\$ 26 million. According to the ATP, the TCE had demonstrated inexperience when performing the calculations. According to Seopa, the EPTC had committed irregularities and failed to comply with legislation (Ação..., 2013). On July 27<sup>th</sup>, the 22<sup>nd</sup> Civil Chamber of the State Court (*Tribunal de Justiça do Estado*) voted unanimously to maintain the fare at R\$ 2.85. Two weeks earlier, the TCE, with the support of a favorable opinion from the MP, had issued a precautionary measure guaranteeing that value for the fare (Justiça..., 2013).

On September 26<sup>th</sup>, the ATP filed an extrajudicial notice requesting compensation for the amount invested — R\$ 135 million. The PMPA alleged the companies would not be entitled to compensation because they were operating without having tendered for the concession and acted based on a temporary license. The ATP rebutted, blaming the PMPA for not having organized the tendering process. ZH emphasized the position of entrepreneurs (Empresas..., 2013c).

At that moment, there was a change in the relationship between the companies and the PMPA, which until then had been one of cooperation. That is to say, the *Bloco's* actions had provoked a social accumulation that modified the relationship between the actors that dominated the main power resources and had agreed and maintained the rules over many decades. For the first time the positions of the ATP and Seopa (with open interest and very high value) were opposed to those of the PMPA and EPTC. The indifference of the Comtu, who thus confirmed its irrelevance as an instance of social control is notable. The position of the Chamber was the same.

### 5.6 “OCCUPY THE CHAMBER”

On July 10<sup>th</sup>, the *Bloco* occupied the Council Chamber, restating the “demands for a free municipal pass for students and the unemployed and the disclosure of the cost sheets of the public transport companies” (Andrade, 2013a). The occupation lasted eight days and gathered about 600 people. On July 12<sup>th</sup>, after debates and negotiations, there was a conflict between activists and the Speaker of the House and an RBS TV journalist (belonging to the same group as ZH). After the incident, repossession was requested (Haubrich, 2013a). The TJ decided the demonstrators would have to leave the Chamber by 6 am on July 15<sup>th</sup>. However, the protestors decided to remain until the President “... handed over to the Executive the bill of law that grants a free pass on public transportation for students and the unemployed, as well as demanding the disclosure of the accounts of the companies in the sector and the referral, to the MP, of an application to break the financial confidentiality of the entrepreneurs” (Bloco..., 2013).

On the 15th the officers inspected the Chamber and the Judge in charge made the following order: “[...] confirmed the presence of more than 400 people, including children, in a peaceful and organized occupation. Also, there are no indications of depredation of the public property by the demonstrators. So, I understand that the drastic measure of forced withdrawal of these citizens is not the best way” (Andrade, 2013). On July 7<sup>th</sup>, the conciliation hearing mediated by the Judiciary and MP concluded with an agreement that included the resumption of the sessions and the protocol of two bills: that of the free pass and the transparency of the accounts/spreadsheets of the public transport companies (Acordo..., 2013).

ZH published several articles claiming the demonstrators were censoring the freedom of the press, violating the right of the parliamentarians to come and go, and that the Plenary could not continue being an “a space with access restricted to those who receive authorization from the group installed there” (Oliveira, 2013:8). While occupying the Chamber, the movement continued to count on the collaboration of councilmen who ceded their offices and helped to draft bills. Members of the Union of Public Transport Workers’ opposition were also present at the assemblies. Rejecting the occupation, the political parties and the councilors supporting the Mayor and most of the councilors made arrangements for repossession of the Chamber and later installed a Parliamentary Commission of Inquiry (CPI) to evaluate damage to the property.

The ATP, Seopa, PMPA, EPTC and ZH again shared the same motivation in opposing the occupation, expressing open interest with a very high value. The Comtu remained indifferent. The *Bloco*, PSOL and Union of Public Transport Workers’ opposition showed open interest of support with a very high value. The TCE and MPC demonstrated hidden interest. The Chamber was forced out of its position of indifference by acting, through its Presidency, for rejection with open interest and very high value.

### 5.7 THE PUBLIC TRANSPORT WORKERS STRIKE

On January 1<sup>st</sup>, 2014, the public transport workers went on strike to support their demands for a pay rise, a reduction in the working day and increased benefits. In the Regional Labor Court (TRT), the ATP obtained a decision that the workers should maintain 70% of the buses in circulation. In defiance to the position of the Union’s leadership, “workers extended the blockade to 100%,” on January 1<sup>st</sup>. Seopa filed a suit alleging the “abusive nature and illegality” of the strike and the TRT increased the fine imposed

on the union. After two days with no buses running, the workers agreed to operate 50% of the fleet. On February 2<sup>nd</sup>, although no agreement had been reached, they returned to work, but continued in a state of strike until the collective bargaining process achieved an agreement. ZH cooperated with the entrepreneurs, asserting the strike was abusive and disrespected the citizens. The *Bloco* supported the public transport workers, and even participated in the pickets at the garages (Haubrich, 2014b). Again, the ATP, Seopa, PMPA, EPTC and ZH shared the same motivation for rejection, expressing open interest with a very high value. The Comtu also abandoned its position of indifference. The Chamber returned to that position. Finally, the TCE and MPC continued with hidden interest.

### 5.8 THE FARE INCREASE IN 2014 AND THE BLOCO'S POPULAR INITIATIVE BILL

On February 21<sup>st</sup>, the ATP and Seopa filed a request to adjustment the bus fares without indicating the percentage. On April 4<sup>th</sup>, Comtu voted for a readjustment of 5.6% recommended by the EPTC, raising the fare from R\$ 2.80 to R\$ 2.95. There were protests led by the *Bloco* and confrontation between demonstrators and the Municipal Guard in front of the PMPA (Nova..., 2014). ZH continued to criticize the demonstrations.

In a new action, on April 7<sup>th</sup>, the *Bloco* held a popular assembly attended by about 400 people, which approved the general terms of the text of a popular initiative bill, which had originated during the occupation of the Chamber, and deliberated the collection of signatures. The bill stated that, within a maximum of ten years, the bus transport system would be 100% organized and provided by the municipality, the disclosure of the cost sheets, and there would be municipal free passes for students, unemployed, indigenous peoples and *quilombolas*.<sup>4</sup> In addition, the bill proposed the creation of a new Municipal Council composed mainly of popular and union organizations with deliberative power (Haubrich, 2014c). Besides the collection of online signatures, the *Bloco* organized a camp in front of the City Hall, and in the first three days collected more than six thousand signatures. For eight days, there were meetings, debates with demonstrators and public transport workers, protest vigils and pamphleteering. With the exceptions of the opposition within the public transport union and PSOL, the position of the other social actors was hidden or indifferent to this *Bloco's* initiative.

It is important to note that although there were no objective developments in relation to this action, the fact itself once again expresses the *Bloco's* strategy of occupying the public space and highlighting the issue of public transport in the city.

### 5.9 PUTTING THE PUBLIC TRANSPORT CONCESSION OUT TO TENDER

The first call for bids was opened from the February 11<sup>th</sup> to 25<sup>th</sup>, 2014. It was necessary to have a public hearing, which was scheduled to take place in the Chamber on February 27<sup>th</sup>. About 150 protesters summoned by the *Bloco* were prevented from entering; According to ZH “there was the beginning of a disturbance, and the Municipal Guard used crowd control weapons to restrain the demonstrators”

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<sup>4</sup> The quilombola people originated in the resistance against slavery in Brazil. The slaves who escaped organized villages known as “quilombos”. Contemporary quilombola communities an identity that constitutes a basis for organization and political action. Part of their struggle is for the recognition of property rights over territories that were, in the past, quilombos.

(Após..., 2014a:55). The public hearing was rescheduled for March 3<sup>rd</sup> at a local sports hall (*Ginásio Tesourinha*). About 15 minutes after the hearing started, “at least four firecrackers were hurled by protesters towards a table occupied by officials in the center of the *Tesourinha Gymnasium*.” Soon after, “there was a clash between demonstrators and the Municipal Guard” (Após..., 2014b:55).

In addition to condemning the *Bloco*'s action, ZH reported that if the companies lost their concessions, the ATP would request reimbursement from the PMPA “to indemnify the dismissed workers, to cover an investment of R\$100 million in electronic ticketing and to pay the outstanding costs of fleet renewal” (Após..., 2014b: 55),

For the Mayor, the *Bloco*'s action showed that the movement did not want the bidding to go ahead (Audiência..., 2014). For the *Bloco*, the hearing was nothing more than “a farse prepared by the Municipal Government and the entrepreneurs to legitimize an elitist model of public transport that only benefits the transport businessmen”. To inform the population, the *Bloco* pamphleteered the bus terminals (Bloco, 2014).

On the day determined for the opening of the envelopes with the proposals (June 3<sup>rd</sup>), the TCE suspended the bidding procedure due to the degree of uncertainty. Even so, the commission opened the envelopes and found that there were no bids (Licitação..., 2014a).

On September 9<sup>th</sup>, the MP delivered a document of preventive nature to the PMPA and EPTC recommending there would be no compensation paid to the current operating companies, suggesting it would constitute “an act of administrative misconduct, a civil and criminal offense” and “administrative irregularity that would lead to the rejection of the accounts, including the filing of the suitable lawsuits with Judiciary and the possibility of representation to the Court of Auditors” (Sob..., 2014). For the President of the EPTC, “the recommendation is contrary to the request made by the speaker of the TCE, who asks that a provision be made to indemnify the current operators of the public bus system” (MP..., 2014).

A new call of bids was issued on September 19<sup>th</sup>. The PMPA added items such as enabling foreign companies to bid, expanding lines, increasing the fleet and the installation of air-conditioning on all vehicles within 10 years. In addition, it complied with the recommendation of the MP not to indemnify the current operators (Licitação..., 2014b).

The ATP attempted to block the case by presenting a precautionary measure to the TCE. However, the MPC filed a motion to suspend the trial. The ATP's Executive Manager told ZH that “the companies will not make any proposals. If another company presents a bid and wins, Porto Alegre runs the risk of seeing the public transport system deteriorate in the future” (ATP..., 2014). On November 24<sup>th</sup>, the envelopes were opened and, once again, there were no bids. The Mayor announced a “plan B”, with a new call for bids to take place within six months in which bus lines rather than transport zones, thus allowing “greater democratization”, because small companies would be able to participate (Pela..., 2014).

It is evident that ATP and Seopa tried to blackmail the City Government, and with the support of ZH and the omission of the Comtu and the Chamber. The *Bloco*, TCE and MP shared the position of pointing out that mere putting the concession out to tender would not in itself ensure the introduction of new rules. We shall return to this topic in the conclusions.

Chart 2 shows a synthesis of the relations in light of propositions of the TSP.

## CHART 2 SYNTHESIS OF THE RELATIONS OF CONFLICT AND COOPERATION AMONG THE SOCIAL ACTORS

Social facts	In favor	Against
Facts in the first quarter of 2012: request for increase of 9.25 in bus fares	ATP Seopa EPTC Comtu PMPA ZH	BLOCO PSOL
Fare increase in 2013	ATP Seopa EPTC Comtu PMPA	BLOCO PSOL PUBLIC TRANSPORT WORKERS
Court injunction	PSOL BLOCO	ATP SEOPA EPTC PMPA ZH
Demonstrations after the fare reductions	BLOCO PSOL	ATP SEOPA EPTC PMPA ZH
Businessmen appeal	ATP SEOPA ZH	EPTC PMPA
“Occupy the chamber”	BLOCO PSOL PUBLIC TRANSPORT WORKERS	PMPA CHAMBER ZH
Public transport workers strike	PUBLIC TRANSPORT WORKERS BLOCO	ATP SEOPA EPTC COMTU PMPA ZH
Popular Initiative bill	BLOCO PSOL PUBLIC TRANSPORT WORKERS	EPTC COMTU PMPA CHAMBER
Call for bids for public transport concession	EPTC CITY HALL TCE	ATP SEOPA

Source: Elaborated by the authors.

## 6. POWER RESOURCES USED BY SOCIAL ACTORS

As mentioned above, the action executed by an actor assumes the use of critical resources for what is in dispute. The social facts and the resulting accumulations demonstrate the capacity of the *Bloco*, acting under rules that served to ensure the advantages acquired by the transport entrepreneurs in a cumulative historical process, to conduct creative actions and to transform its stock of values into strength: and to accumulate political, organizational resources and knowledge. Although not explicit, the cooperative relationships with other stakeholders with valuable power resources such as values and knowledge, and the legal and organizational resources of the TCE and the MPC, strengthened the *Bloco's* initiatives.

It also notable that the actors with the greatest capacity to intervene saw their power resources depleted over the course of the analyzed social production flow, especially the weakened alliance of the ATP and Seopa with the PMPA and EPTC.

## 7. CONCLUSIONS

Although the *Bloco* was not the main protagonist in many of the facts presented, there is no doubt that it was the actor that triggered the process and that, in the flow of social production, took decisive action. Likewise, the fundamental role of the TCE and the MPC in the rule changes is unquestionable, as there is also no doubt their actions were triggered following the *Bloco's* sequence of the actions.

Another point to be highlighted is the breakdown in tacit cooperation between the PMPA and the entrepreneurs. In view of the companies' requests for compensation arising from the injunction that prevented the fare rising to R\$ 3.05, the PMPA was obliged to comply with legally superior regulations and, therefore, to break with the historical alliance that constituted the rule. Disputes between public authorities and the businessmen about the bidding process continued throughout 2015. The first attempts were effectively blocked by the entrepreneurs who refused to participate. In the test of strength that followed under the watchful eye of the MPC, and in the face of the PMPA's threat to introduce a bidding process based on lines (instead of zones) to facilitate the participation of small companies and of allow foreign companies, the entrepreneurs finally tendered in the third call for bids, content merely with the assurance that the requirement to forecast future costs would be withdrawn.

Unsurprisingly, the same companies reorganized themselves into four consortiums and won the concession for the six basins under offer. Nevertheless, the gratuities (representing around 32% of the passengers) were maintained and major changes were foreseen in the 20-year contracts (as of April 2016), which deserve mention: 25% of the fleet with air conditioning, 100% in 10 years; a decrease from six to four passengers per m<sup>2</sup>; another 72 vehicles and immediate replacement of 270; average renewal of 180 buses per year; accessibility throughout the fleet; GPS on all buses to monitor travel time; the creation of a quality control system for the service with penalties in the case of non-compliance and criteria for reliability, security and relation with the users; the creation of a user council complementary to the Comtu (Fortuna, 2015).

Although the entrepreneurs' profits are ensured and the demand for a public and popular transport system has not been won, these transformations constitute evident changes in the rules. They would not have occurred without the decisive action of social actors that confronted the private interests



embedded in the State apparatus. They also clearly demonstrate that rebellion and conflict generated by a creative social actor not subjected to routine and stable behavior can produce instability and a dynamic process that results in changes in the conduct of a public policy.

It should also be mentioned that the June Journeys of 2013, when organized society took to the streets surprising many people, have been predominantly analyzed in terms of their political dimension. In this article, we suggest the importance of analyzing concrete demands in fields of intervention, bringing to light the circumstances that preceded the specific explosion in June and the impact these demands had and continue to have. In Porto Alegre a set of facts was produced with impacts on the organization of public transport. We believe this has also occurred in other places, and that it would be of great relevance to highlight this social production. Of course, these impacts are always limited due to an array of factors that fundamentally includes the unequal possession of power resources. The production of new moves and new flows tends to stabilize the rules of the game in a new configuration that does not meet the all the demands. Even so, it is important to highlight the ability and capacity of creative social actors to produce change and instability.

To conclude, we assert the contribution of Carlos Matus' Theory of Social Production. The application of which enables the identification of the interested social actors, their actions and motivations, the resources they put into play, the shifts in terms of alliances, moves and interests. It also allows us to understand that the production of public policies results from a dynamic interaction between different social actors, located within and outside the state apparatus. It is an original theoretical contribution, developed from the specificities of Latin American social formations, but little explored, given the potential it offers for shedding light on public policies, their genesis, formation, processes and social repercussions.

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