

Socioeconomic Contention and Post-revolutionary Political Change in Egypt and Tunisia: A Research Agenda

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ABSTRACT

This working paper outlines a research agenda that aims at studying the dynamics and consequences of socioeconomic contention during the current processes of political transformation in the Middle East and North Africa (MENA) region from a comparative perspective that includes an interregional comparison with South America. In doing so, the authors review the state of research on socioeconomic protests in the MENA region, sketch an overall analytical framework and critically discuss the contentious politics approach on which this framework draws on. Finally, the paper presents a multilateral research project that has precisely set out to analyze to what extent and how socioeconomic contention shapes the ongoing process of political transformation in post-revolutionary Egypt and Tunisia.

1 INTRODUCTION

It is widely acknowledged that socioeconomic grievances were among the major forces driving the uprisings in Egypt and Tunisia. Revolutionary slogans reflected these grievances, demanding a life in dignity, “bread, freedom and social justice”. Yet, since the overthrow of the dictators in early 2011, Egypt has experienced extreme ups and downs of labor protests and protests against shortages of basic goods and services (e.g. fuel, electricity). In Tunisia, workers of all kinds of sectors recurrently go on strike and protests for employment especially in marginalized regions paralyze production and everyday lives. However, the socioeconomic dimension of the transformation process is largely neglected – especially by local politicians, but also by academic observers. In Egypt and Tunisia, governments have asked for patience, since economic recovery will take time and needs, in particular, political stability. A political debate about economic policy or reform of the economic order has yet to take place. Instead, the reform of political institutions, conflicts over identity (secular vs. Islamist) and civil-military relations dominate the political agenda – and, likewise, academic research (Al-Anani 2012; Albrecht/Bishara 2011; Brumberg 2012, Zeghal 2013).¹

This working paper starts from the premise that the current transformation process in Egypt and Tunisia also involves a struggle over socioeconomic issues, including economic and social policies and the economic system in general. The ongoing socioeconomic contention in the two countries underscores the general finding from comparative research that the ways in which emerging political regimes respond to socioeconomic discontent are of crucial importance for political transformation processes. The present paper therefore proposes a way to gain a fuller understanding of the dynamics of contentious politics concerning socioeconomic issues in Egypt and Tunisia, and their broader political implications. It lays out a research agenda that investigates *to what extent and how socioeconomic contention shapes the ongoing process of political transformation in Egypt and Tunisia*. In order to answer this research question, the paper suggests to:

- (1) empirically assess socioeconomic protests since the fall of Ben Ali and Mubarak, including the issues being contested and the actors involved;
- (2) analyze political reactions to socioeconomic contention, including the ways in which the regimes deal with contentious actors and modify their economic policies;

1 For an overview of the literature on the transformations in the Arab World since 2011, see Weipert-Fenner (2014).

- (3) study the resulting dynamics of contentious politics – i.e., the patterns of interaction between state and contentious actors;
- (4) identify the effects of socioeconomic contention on the overall process of political transformation.

In order to do this, we propose to enrich the intraregional comparison of Egypt and Tunisia with an interregional comparative perspective. As transformation processes in the Arab countries are still very much ongoing, with unclear outcomes and little prior experiences with democratization, we specifically argue that it is promising to systematically draw on experiences from South America. This world region offers a wealth of well-researched insight into the relationship between contentious politics, socioeconomic dynamics and political change, both in the context of what (with hindsight) can be identified as transitions to democracy and, more recently, in the context of challenges to and transformations of the post-transition model of “neoliberal democracy”.

The paper starts by reviewing the existing literature on the Arab uprisings with a particular focus on the role of socioeconomic protests (2.). Then, we present an analytical framework for studying the relationship between socioeconomic contention and political change that draws on the contentious politics approach developed by Charles Tilly, Sidney Tarrow and colleagues (3.) and discuss the potential pitfalls of working with the contentious politics approach, especially in studies on countries from the Global South (4.). In the final section of the paper, we briefly outline a multilateral research project that has precisely set out to investigate the relationship between socioeconomic protests and political transformation in post-revolutionary Egypt and Tunisia (5.).²

The research agenda outlined here is primarily driven by an academic and political interest in Egypt and Tunisia. The following discussion, therefore, focuses on the Middle East and North Africa (MENA) in general and these two countries, in particular. Still, besides including references to democratization/transformation studies and research on contentious politics, we especially (if briefly) review research on South America – which is, of course, motivated by our overall interest in making use of insights from this region for the study of contentious politics in the Arab world. In this paper, we specifically draw on research on South America when justifying our focus on socioeconomic contention in Section 2 and when defining our core concepts and developing the analytical framework in Section 3. Furthermore, in the context of the research project outlined in Section 5, the identification of typical empirical patterns and causal mechanisms, based on existing research of South America, will serve to inform and orient the in-depth analysis of Egypt and Tunisia.

2 SOCIOECONOMIC CONTENTION IN THE MENA REGION POST-2011: THE STATE OF RESEARCH

The recent series of uprisings across the Arab world has shaken not only regional politics, but also dominant assumptions and theoretical perspectives that had hitherto guided political science research on the MENA region. This has sparked a process of critical reflection among scholars from which two interrelated themes have emerged that are crucial for the present paper (cf. Asseburg et al. 2012; Pace/Cavatorta 2012; POMEPS 2012; Valbjørn 2013, Hudson 2015).

First, with the successful toppling of dictators in Egypt and Tunisia, the paradigm of authoritarian resilience which focused on explaining the stability of autocratic regimes in the region (Fürting

2 The research project “Socioeconomic protests and political transformation: Dynamics of contentious politics in Egypt and Tunisia against the background of South American experiences” is a collaborative effort by scholars from the Arab Forum for Alternatives (AFA) in Cairo, the Peace Research Institute Frankfurt (PRIF) and the University of Sfax. It is generously funded by the *VolkswagenStiftung*. We thank the fellow members of this research team for their input as well as Thomas Demmelhuber, Thorsten Gromes, Hans-Jürgen Puhle, Achim Rohde, various colleagues at PRIF and the referees of the *VolkswagenStiftung* for comments on previous versions of this paper. The sole responsibility for this paper, however, lies with the authors who are the directors of the project. For further information, see <<http://www.hsfk.de/Socioeconomic-protests-and-political-transformatio.905.0.html?&L=1>>.

2007; Schlumberger 2007) has increasingly been questioned. At the same time, the complexities of political change since 2011 – most notably the 2013 military intervention against Egyptian President Mursi that was supported by many of the former “revolutionaries” – have defied expectations of straightforward progress towards democracy. The paper, therefore, departs from the assumption that elements of both continuing authoritarian rule and of democratization are crucial features of the contemporary political transformations in Egypt and Tunisia, but that the latter cannot be properly understood through the lens of either authoritarian persistence or democratization (Pace/Cavatorta 2012; Valbjørn 2013). We, therefore, need a more flexible, inductive perspective that enables us to conceptually and empirically grasp the “dynamic, ambivalent, and open-ended processes of transformation” in the region (Hoffmann et al. 2013:2).

Second, the Arab uprisings have placed more attention on the political role of non-elite social agency – whether individual or collective, organized or spontaneous, in the streets or through the new social media (cf. Bayat 2013a; Howard/Hussain 2013; Pace/Cavatorta 2012:128; POMEPS 2012). While the research on authoritarian resilience has provided important insight into the inner working of autocracies in the MENA region, its “very regime-centered focus” has caused scholars to pay “little attention to the society level” (Valbjørn 2013:2; cf. Bayat 2013a:589). Those researchers who studied social contention in the region prior to 2011 did not take macropolitical consequences into account, but focused on the micro-dynamics of everyday practices at the local level (cf. Bayat 2010; Bein/Vairel 2013; Harders 2003). With hindsight, the largely disparate protests by workers and labor organizations, urban poor and small farmers, students and local self-help initiatives can be seen as coalescing “by the end of the 2000s to form the backbone of what came to be known as the Arab spring” (Bayat 2013a:589; cf. Achcar 2013; Bush/Ayeb 2012). Grassroots protest, in this sense, created the political opportunities that allowed the protests to spread (cf. Bein/Vairel 2013; Bouziane et al. 2013). Yet, at the same time, emphasizing “the contingent nature of protest politics” (POMEPS 2012:7) should not lead scholars to disregard the structural features (neopatrimonialism, crony capitalism, patronage networks), the intra-elite struggles and the regime dynamics that, on their part, shape the evolving political and economic environment of such contentious action (cf. Schlumberger et al. 2013). In this sense, a general lesson drawn from the Arab uprisings is the need to study more intensively the interplay between politics from above and politics from below (Asseburg et al. 2012).

Looking specifically at socioeconomic contention, scholars generally acknowledge that socioeconomic concerns have been important drivers of the uprisings in Tunisia, Egypt and beyond, and speculate that addressing “citizen demands for material improvement and social justice” will be crucial for the future of political transformations (Burnell 2011:846; cf. Bayat 2013a; Costello et al. 2015:97; Dupont/Passy 2012:101; Schlumberger/Matzke 2012:107-108). More specifically, the Arab uprisings have been interpreted as the result of the breakdown of a previous kind of social contract in which the autocratic regimes had offered limited socioeconomic benefits in exchange for loyalty (cf. Guazzone/Pioppi 2012; Zorob 2013) – an interpretation which raises the question of whether a new (or renewed) social contract will emerge and what it might look like (cf. Karshenas et al. 2014).³ This is generally in line with comparative research on democratization processes, which tells us that struggles over the transformation of the political order are usually accompanied by disputes about socioeconomic issues (cf. Collier 1999; Haggard/Kaufman 1995; Rueschemeyer et al. 1992). This becomes particularly clear when looking at research on South America – which can, however, be only roughly sketched here. Drawing on South American developments in the late 1970s and early 1980s, O’Donnell and Schmitter (1986:45), for instance, explicitly identified the

3 This social pact was regarded for a long time as one explanation for autocratic persistence in the MENA region. While the neopatrimonial states (Eisenstadt 1973) essentially controlled economic, political and social affairs, the cooptation of corporatist organizations provided for some bargaining power vis-à-vis the state, yet without allowing for public dissent or bottom-up participation (Desai et al. 2009). Yet, liberalization and privatization reforms increasingly undermined this arrangement, which ultimately led to the increase in social protest cited above (Bein/Vairel 2013).

need for “some sort of socioeconomic pact” to supplement politico-institutional transitions from authoritarian rule. This, in particular, included the need to politically incorporate – and thereby tame – the labor movement (cf. Collier 1999; Valenzuela 1989). As the processes of (re-)democratization in South America in the 1970s and 1980s were, by and large, elite-centered, the political transformations and the (“neoliberal”) economic policies that accompanied it generally respected elite interests at the expense of broader societal claims for a reduction of mass poverty and social inequality (cf. Kurtz 2005; Peeler 2009:69-89; Smith 2005:239-244).⁴ After an upsurge in political mobilization during the struggle against autocratic rule, the 1980s and 1990s were nevertheless characterized by a general downward trend in socioeconomic contention – due to different combinations of formal and informal (clientelist) inclusion, selective repression, social fragmentation and frustrated demobilization (cf. Oxhorn/Starr 1999; Wolff 2009). In this sense, democracy in South America was effectively “tamed” indeed (cf. Smith 2005: Chapter 12; Wolff 2008). Yet the 2000s saw a general re-emergence of contention regarding economic and social policies and a return of the “social question” – with immediate political implications that are generally discussed as a “turn to the left”.⁵

Concerning the MENA region, there is still almost no research on contemporary socioeconomic contention and its political implications. As a result, we even lack reliable and comprehensive data on socioeconomic protest in Egypt and Tunisia before and after 2011. Multi-year statistics exist only on labor protests and these show that both countries have experienced high-to-extreme strike levels since 2011, if with different dynamics over the years.⁶ Regarding the main players who are driving socioeconomic protests, research points to crucial differences between the two countries. The Tunisian trade union federation UGTT (*Union Générale Tunisienne du Travail*), which had preserved certain autonomy from the Ben Ali regime (Erdle 2010), is generally considered strong and united; since 2011, the UGTT has played an explicitly political role, acting like an arbitrator in political negotiations (ICG 2012). In Egypt, the labor movement is described as relatively weak and divided among the still existing state-controlled Egyptian Trade Union Federation (ETUF), two newly established independent trade union federations (EFITU and EDLC) and independent trade unions outside these umbrella organizations (Abdalla 2012; cf. Beinín 2001). In Tunisia, social movements such as the *diplômés chômeurs* have moved toward formalization and even gained legal recognition (ICG 2012). Finally, a preliminary analysis of local newspapers suggests that both countries continue to experience what Bayat (2007) has called “social non-movements”: informal, mostly issue-specific collective action by unorganized actors. Important issues that provoke spontaneous protests include prices, shortages of goods and housing (cf. Abdelrahman 2013).

As regards the political response to socioeconomic contention, Schlumberger and Matzke (2012:108) conclude that, although the interim governments of both Tunisia and Egypt “have used deficit spending to alleviate the economic crisis,” “the immediate economic consequences of the

4 As Ruth Berins Collier has emphasized, a crucial difference between the “historical” cases of democratization in Western Europe and (re-)democratization in the 1970s and 1980s in South America is that, in the latter period, “the working class was decidedly on the defensive in the face of economic recession, [...] the debt crisis, and the reorganization of production at firm, national, and global levels” (Collier 1999:14). This, obviously, bears some important similarities to the socioeconomic context in the contemporary cases of political transformation in countries such as Egypt and Tunisia.

5 The scholarship on Latin America’s leftist turn is vast. Important comparative studies include Cameron/Hershberg (2010), Levitsky/Roberts (2011), and Weyland et al. (2010). On the reemergence of socioeconomic contention, and the general surge in social movements and protests that preceded the leftist turn, see, for example, Alvarez et al. (1998), Eckstein/Wickham-Crowley (2003), Johnston/Almeida (2006) and Silva (2009).

6 In Egypt, the annual number of strikes increased from 1,256 in 2011 to 2,161 in 2012 and skyrocketed as part of the broad mobilization against then President Muhammad Mursi with 1,972 labor protests only in the first half of 2013. Strikes came to a standstill after Mursi’s ouster but started again in the first quarter of 2014 with 250 labor protests during these three months (according to data provided by the Egyptian NGOs Awlad al Ard [for 2011] and Egyptian Center for Economic and Social Rights [for 2012-2014]). In Tunisia, official statistics of the ministry of social affairs show that the number of formal strikes was extremely high in 2011 and 2012 (567 and 524 respectively) and went down to 400 strikes in 2013.

Arab Spring in Tunisia and Egypt have so far been dire, and the expectations of the population are far from being fulfilled.” While systematic assessments are lacking and normative perspectives differ, scholars largely agree that governments in the two countries – the dramatic changes in government in the Egyptian case notwithstanding – have largely continued the social and economic policies of the previous regimes (cf. Paciello 2013; Roll 2013). For Hinnebusch (2015: 30), it is the dependency on international financial institutions that guarantees the continuity of “a neoliberal order” in Egypt, Tunisia and Morocco and, thereby, impedes substantial economic reforms that would respond to existing “demands for social justice”. Achy (2015), by contrast, points to two types of domestic actors that forestall change: the repressive apparatus and vested interests, especially former regime cronies. In general, or so it seems, the “networks of privilege” (Heydemann 2004) that informally connect state and business sectors were not seriously affected by the so-called revolutions and, thus, remain powerful until today.

Yet, this basic continuity in economic policy notwithstanding, the two cases clearly differ in the way they actually deal with protest, with Egypt’s different transitory governments being much more repressive. Already in 2011 the provisional military rulers in Cairo imposed a ban on strikes and demonstrations (Bayat 2013b:48) – and such restrictions have characterized the political process in Egypt ever since, also in areas not related to the political repression of the Muslim Brotherhood following the ouster of President Mursi in 2013. In the case of Tunisia, the level of repression is much lower, and political dialogue figures more strongly. Here, it is rather political violence by Salafi extremists against left-wing politicians and trade unionists that has recurrently endangered what is generally a fairly consensus-oriented transition process (Amami 2013).

3 UNDERSTANDING SOCIOECONOMIC CONTENTION AND POLITICAL TRANSFORMATION: AN ANALYTICAL FRAMEWORK

With a view to studying the relationship between socioeconomic contention and political change, the research agenda outlined in this paper draws on the approach to contentious politics developed by Charles Tilly, Sidney Tarrow and colleagues (cf. McAdam et al. 2001; Tilly/Tarrow 2007; Tarrow 1998). Contentious politics, in this literature, is understood as interactions between the state and recognizable sets of people who engage in collective claim-making.⁷ The latter include a wide range of social actors who can be more or less formalized and more or less stable (from business associations and trade unions to social movements and spontaneous protests). “The state” encompasses governments, agents of governments and polity members in a broader sense (judiciaries, parliaments, political parties). Here, we specifically focus on socioeconomic contention defined as all those instances of contentious politics in which actors’ primary claims are socioeconomic. “Socioeconomic” claims relate to the production/consumption or distribution/redistribution of economic resources, including the norms and institutions that structure these processes. Drawing on research of social protest in Latin America (Eckstein/Wickham-Crowley 2003; Johnston/Almeida 2006), we systematically distinguish between four kinds of socioeconomic claims: those that refer to

- (a) productive activities (e.g., access to land, subsidies, credits, taxes);
- (b) social consumption (e.g., public services, health, education, water, transportation, price/tariff subsidies);
- (c) income (e.g., wages, collective contracts, pensions, work, income transfers); and

⁷ Tilly and Tarrow (2007:4) define contentious politics broadly as “interactions in which actors make claims bearing on someone else’s interests, leading to coordinated efforts on behalf of shared interests or programs, in which governments are involved as targets, initiators of claims, or third parties”. We focus on those interactions that directly involve the state as target or initiator of claims.

(d) labor rights (e.g., the right to unionize, employment standards).

In responding to such socioeconomic demands, governments need to deal with contradictory claims for the protection of economic elite interests, which tend to be threatened by protest-driven processes of political transformation, and for a redistribution of socioeconomic resources (“social justice”), which tend to accompany demands for a redistribution of political power (Wolff 2008). This challenge may be limited to disputes about specific policy changes with redistributive consequences, but becomes particularly serious when the process of transforming the political order also gives rise to a more fundamental debate about changing the economic order. At the same time, the above-mentioned reference to labor rights such as the right to unionize already shows that socioeconomic contention is not only about *policy*-related demands, but also about *polity*-related claims. In this polity dimension, the question is how emerging political regimes balance respect for the autonomy of contentious actors and their interest in controlling them, and to what extent they establish institutionalized mechanisms of inclusion or choose strategies of exclusion. The analytical framework summarized in Table 1 therefore distinguishes between (1) substantial (policy-related) challenges related to redistributive struggles over “continuity vs. change” with a view to economic and social policies as well the shape of the economic order at large and (2) institutional (polity-related) challenges that include the polarities of “autonomy vs. control” and “inclusion vs. exclusion.”

Table 1: Analytical framework: Dynamics and consequences of socioeconomic contention

	Dynamics of contention <i>Range of options</i>	Effects on transformation <i>Selected dimensions of change</i>
Policy dimension <i>(substantial)</i>	Policy change vs. continuity	Effects on (a) political responsiveness and (b) social justice
	Structural change vs. continuity	
Polity dimension <i>(institutional)</i>	Inclusion vs. exclusion	Effects on (a) political participation and (b) institutional representation
	Autonomy vs. control	

Table 1 differentiates between dynamics of contention, i.e. the patterns of interaction between contentious actors and “the state”, which includes direct governmental responses to socioeconomic protests, and the broader (macro-)political effects that these dynamics may have on the overall process of transformation.⁸ With a view to the former, the fourfold range of options enables us to systematically identify and elucidate different dynamics of socioeconomic contention. In the policy dimension, the crucial question is to what extent socioeconomic contention produces changes in economic and social policies, including changes in the basic structures of the politico-economic order. In the polity dimension, ideal-type cycles of contention combine inclusion and autonomy (liberal-democratic inclusion), inclusion and control (cooptation), exclusion and control (repression) or exclusion and autonomy (marginalization). But, of course, mixed dynamics are also possible (i.e., inclusion of some, repression of other contentious actors).

The potential effect of socioeconomic contention on the overall process of political transformation is more difficult to grasp conceptually. This is because, first, a transformation process is by definition in constant flux. Second, as seen above, we are concerned here with ambivalent, multidimensional and open-ended processes of change that cannot be captured easily by predefined alternatives such as the dichotomy of autocracy versus democracy. We therefore propose to follow an inductive and focused strategy to assess the macropolitical impact of socioeconomic contention.⁹

⁸ In terms of existing research on the political consequences of social movements, the first dimension, thus, includes governmental policies – such as repression or concessions – that directly respond to a given challenge (cf. Franklin 2009); the second, in contrast, refers to broader, and usually more indirect, effects that social protests and entire cycles of contention may help bring about (cf. Tarrow 1998:175). For an overview of different typologies of the (potential) political consequences of social movements, see Giugni (1999:xxi-xxiii) and Tarrow (1998:161-162).

⁹ The two clusters of dimensions (participation/representation; responsiveness/social justice) have been selected (a) because they are arguably crucial for the kind of (more or less and differently democratic) process of transformation

In the polity dimension, the question is whether the dynamics of contentious politics lead to changing patterns of political participation and institutional representation. While the former refers to any – formal or informal, democratic or otherwise – mechanism through which contentious actors may participate in political will formation and decision making, the latter concerns their official representation in political institutions (e.g., through political parties or corporatist arrangements). In both cases, an inductive strategy is needed because changes in the patterns of participation/representation do not involve only quantitative increases or decreases but also qualitative changes in the dominant types of participation/representation. In the policy dimension, it is to be studied whether socioeconomic contention contributes to making the emerging political order more or less responsive, including the crucial “responsive to whom?” question. Going beyond the mere political output of socioeconomic contention, the “social justice” dimension focuses on the actual socioeconomic outcomes. The question here is to what extent policy changes produced by socioeconomic contention effectively satisfy which kinds of socioeconomic claims. This said, social justice will not be measured according to some external standard of justice but in terms of the perceived entitlements actually claimed by actors.¹⁰

4 REFLECTIONS ON THE CONTENTIOUS POLITICS APPROACH: STRENGTHS AND WEAKNESSES

The contentious politics approach is, of course, not without criticism. With a view to the research agenda outlined here, two charges are of particular importance: (1) that it is characterized by a structuralist and rationalist bias and (2) that it has been developed mainly based on empirical research on social movements in the Global North. In this section, we discuss these two issues in order to clarify the strengths and weaknesses of the contentious politics approach and, at the same time, specify the ways in which our own analytical framework draws on this approach.

The contentious politics approach as coined, in particular, by Tilly and Tarrow has emerged from a broad research program that, for some decades now, has been dealing with social movements and related phenomena of unconventional collective action (cf. McAdam et al. 2001; Tarrow 1998; Tilly/Tarrow 2007). Its roots can be found in the polity model introduced by Tilly (1978) that emphasized the crucial role of political opportunities and constraints in shaping processes of mobilization and demobilization (cf. Tarrow 1998). What became known as the “political opportunity approach” or “political process theory” (Goodwin/Jasper 1999) essentially explained the dynamics of contentious politics by focusing on changes in political opportunities and constraints that incentivize or deter collective action.¹¹ This emphasis on the (changing) political context in which contentious collective action takes place constitutes an important correction to those theories that, in the tradition of Ted Robert Gurr (1970), regard perceived discontent, grievances, or “relative deprivation” as the core drivers of contentious action (cf. Schock 1996:98-105). In fact, there is little doubt that it is of crucial relevance for the dynamics of contentious politics whether protest actors that challenge a given political regime are confronted with institutional access or with extensive repression, whether rifts among elites create potential allies or whether political, economic, and military elites are unified in rejecting the challenge. Yet, the approach originally put forward by Tilly and colleagues, indeed, had a structuralist and rationalist bias, which also made it rather static.¹² Competing approaches to social movements, therefore, highlighted the relevance of agency, of

that may unfold in Egypt and Tunisia and (b) because it is particularly in these two areas that socioeconomic contention can be expected to produce significant effects.

10 This approach to justice follows PRIF’s research program “Just Peace Governance” (cf. Baumgart et al. 2011; Daase/Humrich 2011; Müller 2010).

11 “When institutional access opens, rifts appear within elites, allies become available, and state capacity for repression declines, challengers find opportunities to advance their claims.” (Tarrow 1998:71)

12 See, for instance, the harsh critique by Goodwin and Jasper (1999), the sympathetic discussion of the evolution of Tilly’s work by Tarrow (2008) as well as the self-critical reflections and theoretical modifications in McAdam et al. (2001: chapter 1).

ideas and ideologies as well as of the dynamic and creative nature of mobilization and interaction processes. From a constructivist perspective, for instance, scholars have pointed to the need to analyze framing processes and, in particular, collective action frames (cf. Benford/Snow 2000). From an actor-centered, rationalist perspective, resource mobilization theory has emphasized the role of economic, communication, and human resources, of preexisting organizational structures and of “movement entrepreneurs” (cf. McCarthy/Zald 1977).¹³

In taking up at least part of this criticism, in their more recent theoretical conceptualizations Tarrow, Tilly, and colleagues have integrated the dynamic role of agency and actors, social interaction and communication:

“But in the course of our work on a variety of contentious politics in Europe and North America, we discovered the necessity of taking strategic interaction, consciousness, and historically accumulated culture into account. We treat social interaction, social ties, communication, and conversation not merely as expressions of structure, rationality, consciousness, or culture but as active sites of creation and change. We have come to think of interpersonal networks, interpersonal communication, and various forms of continuous negotiation – including the negotiation of identities – as figuring centrally in the dynamics of contention.” (McAdam et al. 2001: 22)

As a consequence, in their 2007 book, Tarrow and Tilly include mechanisms such as “social appropriation” (the transformation of nonpolitical into political actors) or “identity shift” (the formation of new identities within challenging groups) in their analytical framework (Tarrow/Tilly 2007: 34).

These modifications make it possible to use the contentious politics approach, as outlined for example in *Contentious Politics* (Tarrow/Tilly 2007), without downplaying the significance of agency, ideas, or the dynamic (and contingent) nature of interaction processes. But, still, certain blind spots remain as does the structuralist legacy. These limitations of the approach become particularly clear when taking into account research that is dealing with societies outside the rather specific part of the world – “Europe and North America” (McAdam et al. 2001: 22) – on which the contentious politics approach is largely built on. It was only in the late 1990s that the approach was applied to other regions and thereby further developed. Major contextual differences such as the autocratic nature of many political regimes and different socioeconomic challenges in developing countries were generally identified as factors that shape state-society relations and thus effect the dynamics of contentious politics (Shigetomi 2009:6). In the following, we will highlight some selected insights from the two regions of the Global South this paper is particularly concerned with: Latin America and, of course, Middle East and North Africa.

In a review of studies on social movements and political change in Latin America, for instance, Kenneth Roberts has argued that democratization “may provide social actors with new channels of access to public institutions, but it can also remove authoritarian rulers against which opposition forces unified and mobilized, inject divisive forms of partisan competition into social organizations, and resurrect political parties and electoral activities that can siphon off energy from social networks” (Roberts 1997: 139). In this sense, political opportunity structures that, according to the contentious politics approach, should facilitate contentious collective action had, in fact, rather demobilizing effects in a series of Latin American countries (cf. Kurtz 2004; Oxhorn 1998; Wolff 2008: chapter 3, 2009). At the same time, however, this same structural political context enabled, in later years, a remarkable re-emergence of social protest and social movements (cf. Silva 2009; Van Cott 2005; Yashar 2005; Wolff 2007). The combination of relative open political opportunity structures with the social hardships associated with neoliberal reforms certainly constituted the overall

13 These two are, of course, only the most prominent “competitors”. For overviews of the state of social movement research, see Goodwin/Jasper (2004), Morris/Mueller (1992), McAdam et al. (1996), and Rucht et al. (1998).

structural background that enabled this new cycle of contention; still, in explaining dynamics and differences of contentious mobilization across the region, scholars have pointed to the creative agency of individual and collective actors, to associational networks that could be used, appropriated, and transformed by such actors as well as to the relevance of collective action frames (for instance, in the case of indigenous movements).¹⁴ Another specific issue that has emerged from studies on Latin America concerns the issue of clientelism, patronage, and, more generally, informal institutions which have been shown to be crucial in shaping the interaction between contentious actors and “the state” and are, hence, important to consider if we are to understand cycles of contention in this region (cf. Auyero 2000; Lapegna 2013; Wolff 2007, 2008).

With a view to the MENA region, the concept of contentious politics was first and foremost applied to the study of Islamist movements (Bennani-Chraïbi/ Fillieule 2003; Clark 2004; Wickham 2002; Wiktorowicz 2004). Underlying was the attempt to show that Islamist activism was “not unique” but a normal social phenomenon that “has elements common to all social movements” (Singerman 2004:13). Yet, in some cases, the contentious politics approach was simply applied in order to prove that the MENA region fitted the concept instead of critically reflecting on its limitations and blind spots (cf. Bayat 2005). Furthermore, while the approach was already further developed in the 2000s as explicated above, these innovations were only selectively integrated into the studies on the MENA region (cf. Meijer 2005:289). As a result, Beinin and Vairel (2013:6) have argued that structural determinism continues to shape research on social movements in the region.

Recent studies also included different kinds of social contention such as the workers’ and civil rights movement (Beinin/Vairel 2013; Mahdi 2009; Weipert-Fenner 2013). These studies have shown that the approach of contentious politics can indeed be helpful for understanding dynamics of contention in the MENA region by conceptualizing repertoires of contention, formal and informal protest networks as well as cycles of contention. What is important here is the clear focus on actors’ perceptions and relations, which has enabled scholars to avoid assumptions of “structuralism and teleology” (Beinin/Vairel 2013: 19). From this perspective, the different contexts in which contentious politics are embedded in the MENA region do not prevent scholars from applying the approach but, if systematically studied from the actors’ perspectives, offer a chance to contribute to the further development of the approach itself. For the envisaged research agenda, this is even more important as the context in which our research takes place is characterized by dynamic, yet ambivalent transformation processes. Against this background, we agree with Beinin and Vairel who argue that

“the Middle East and North Africa can be understood using the tools that social science has developed for the rest of the world. And we argue that the Middle East and North Africa provide a complex and fascinating laboratory, not only to confirm the applicability of SMT [social movement theory] but also to enrich our theoretical knowledge of social movements and other forms of political contestation.” (Beinin/Vairel 2013: 2; see also Hoffman/König 2013)

Given these insights and critiques, it is important to emphasize that the proposed research agenda does not aim at adopting the contentious politics approach as a causal model and, then, applying it to analyze and explain the particular cases. Instead, we merely draw on the approach in order to define our core concepts and construct our analytical framework. This “drawing on” has three implications which are relevant for the issue at hand:

- (1) While we define our main *categories* and *ranges* of actors in line with Tilly and Tarrow, our framework remains open to both include case-specific *kinds* of actors as well as to

14 See, for instance, the studies already cited (Silva 2009; Van Cott 2005; Yashar 2005; Wolff 2007). For broader comparative assessments of social movements in Latin America from different theoretical perspectives, see the edited volumes by Alvarez et al. (1998), Eckstein (2001), Eckstein/Wickham-Crowley (2003), Johnston/Almeida (2006), and Stahler-Sholk et al. (2014).

consider shifts of actors from one category to another. Empirically, our starting point is the search for socioeconomic protests and socioeconomic claims (via the protest event analysis outlined below) – the relevant actors will, then, be identified inductively based on their role in these events. The typology of socioeconomic claims that will be used for the protest event analysis is deliberately *not* taken from the general contentious politics framework, but from research on social movements and social protest in Latin America (see above) – which we consider more appropriate for the MENA region than typologies based on research in Europe or North America.

- (2) The analytical framework summarized in Table 1 draws on established concepts and distinctions, but – again – the fourfold range of options that it establishes to assess dynamics of contention is open to unexpected shades and combinations. This is all the more true for the selected dimensions of change; here, we have explicitly proposed an inductive strategy to assess the effects of contentious politics on the overall process of political transformation.
- (3) Most importantly, the entire research design is a process- and actor-centered one: We start by identifying protest events as well as the related actors and claims; this, then, is the starting point for analyzing the evolving dynamics of contentious politics. In the context of this analysis of contentious politics, case studies also have to consider the structural (political, economic etc.) contexts that constrain, enable and thereby shape contentious action, political responses and the evolving processes of interaction – but it also requires assessing the ways in which these actions and interactions shape, modify or even transform the very structural contexts.

To summarize, the research agenda outlined here draws on the refined version of the contentious politics approach in which Tilly, Tarrow, and colleagues have modified their all-too structuralist and rationalist framework by recognizing the crucial roles of agency, ideas, and interactions. However, because their approach can still not be expected to simply “fit” the specific dynamics of contentious politics we are interested in, we suggest using the approach neither as a fixed template to “pigeon-hole” actors and events nor as an explanatory framework to be “applied” to our cases. In a much more modest – but still very useful – way, the contentious politics approach basically helps us to define and clarify some of our core concepts and typologies. At the same time, the approach serves as one important source of our analytical framework – a framework that is descriptive and inductive rather than explanatory and deductive. The preference for a descriptive and inductive strategy reflects the scarce knowledge that exists on the relationship between socioeconomic contention and political transformation in general and, in particular, with a view to the MENA region.¹⁵

5 STUDYING THE DYNAMICS AND CONSEQUENCES OF SOCIOECONOMIC CONTENTION IN EGYPT AND TUNISIA FROM A COMPARATIVE PERSPECTIVE: OUTLINE OF A RESEARCH PROJECT

The research agenda outlined here is primarily driven by an academic and political interest in two countries whose future development is arguably of great importance for broader political change in the MENA region as a whole. In addition, analyzing and comparing Egypt and Tunisia promises theoretical insights into the relationship between socioeconomic contention and political transformation. On one hand, it is these two countries that have recently experienced the most far-reaching processes of domestically driven political transformation in the region. On the other, as

15 Traditionally, social movement research used to be criticized as neglecting the political consequences of social movements (Giugni 1999:xiv-xi; Kolb 2007:6). While this lacuna, in the meantime, has at least been partially addressed, existing studies on the policy impact of social movements, again, largely focus on countries in the Global North and, therefore, tell us little about dynamics of political transformation that include profound changes in the political regimes at hand (cf. Giugni et al. 1999; Giugni 2004; Kolb 2007).

seen above, we anticipate crucial differences between Egypt and Tunisia when it comes to socio-economic contention, for instance due to the very different shape and role of the trade-union sector.

In addition to the balanced, intra-regional comparison of Egypt and Tunisia, we have argued that a focused, inter-regional comparison with South America is promising.¹⁶ Important differences notwithstanding (most notably with a view to religion), Egypt/Tunisia and South American countries share crucial experiences such as autocratic, capitalist regimes, state-led development projects in peripheral economies, and the struggle with neoliberal structural adjustment. Therefore, the research project that we outline in this final section will systematically use empirical experiences and theoretical insights from South America to inform and orient research on the Arab cases as well as assess the generalizability of the findings. This integration of South American experiences will be focused in two ways. First, we look at the dynamics and political consequences of socioeconomic contention during two specific periods: the phase characterized by the transition or return to democracy;¹⁷ and the more recent phase in which “anti-neoliberal” mobilization from below has led to a regional, if diverse and uneven “turn to the left”.¹⁸ Second, the project will specifically draw on the cases of Argentina and Bolivia. These two countries, on the one hand, share a series of common features that make them particularly interesting for our topic; most importantly, both cases exhibit experiences with intense and broad socioeconomic contention in the context of broader processes of political change.¹⁹ On the other hand, Argentina and Bolivia, in roughly representing two types of South American countries (Southern Cone versus Andean Region), are characterized by some important differences that render their paired comparison with Egypt and Tunisia promising.²⁰ A more specific difference between Argentina and Bolivia that makes the comparison with Egypt and Tunisia interesting concerns the emergence of “new” social movements: Argentina, between the mid-1990s and the mid-2000s, saw a remarkable cycle of contention driven by unemployed movements (which is to be compared with corresponding developments especially in Tunisia); in Bolivia, in turn, the emergence and contentious action of indigenous movements will be of particular interest (which, despite crucial differences, do bear some

16 As already indicated in the introduction, we chose South America because this region offers rich and well-researched insights into the interrelated processes of politico-institutional and socioeconomic transformation. The most plausible alternative option, Middle and Eastern Europe, was discarded because transformation processes there have followed quite idiosyncratic dynamics due to the Communist past and the EU enlargement process. While, of course, it might also be interesting to compare contemporary processes in Egypt and Tunisia with instances of socioeconomic contention and political transformation in sub-Saharan Africa or Asia, South America is especially suitable for our purposes because it has been characterized by fairly broad regional waves of both socioeconomic contention and political change that have, at the same time, been the subject of in-depth comparative research on which we can draw.

17 A crucial comparative study on this phase is, for instance, Collier’s comparative study on the role of the labor movements in South American (and Western European) democratization processes (Collier 1999).

18 On this phase, see the references in note 5.

19 Even in the protest-prone South American context, Argentina and Bolivia have specifically strong historical traditions of socioeconomic protests. There are, therefore, particularly broad, diverse, and well-researched experiences with socioeconomic contention that have shaped both the transition to democracy in the early 1980s (Collier 1999: chapter 4) and recent political changes in the context of the leftist turn (Wolff 2012). Furthermore, Argentina and Bolivia have experienced marked shifts in the orientation of economic and social policies as well as in the overall development model (first towards “neoliberalism”, than turning away from it).

20 While the demarcation between the two South-American sub-regions – the Southern Cone (*Cono Sur*) and the Andean region – is far from clear-cut, Argentina clearly belongs to the former, and Bolivia to the latter. In a more substantial sense, Argentina is relatively rich and relatively big (in economic and population terms), Bolivia is the poorest country of the region with a small economy and relatively few inhabitants. Besides agriculture, Argentina has a rather strong industrial tradition, while the Bolivian economy is particularly dependent on mining and gas. In terms of culture and population structure, Argentina represents those South American countries (typically in the Southern Cone) with only a very small indigenous population, while Bolivia is the country with the highest share of citizens that self-identify as indigenous. These overall differences between the two countries also lead to more specific differences that are of particular interest to the research project at hand. For instance, Argentina’s trade-union sector is shaped very much by organizations embedded in urban and/or industrial sectors of the economy, while trade unions in Bolivia have traditionally been dominated by agricultural and mining organizations. The same difference applies generally to socioeconomic protests which – both traditionally and in recent years – have typically been concentrated in urban and semi-urban areas (Argentina) or in semi-urban and rural areas (in Bolivia).

resemblance to Islamist movements in the sense that they claim to represent alternative – tradition-based, non-Western and/or non-liberal – conceptions of political and economic order).

In line with the research question – *To what extent and how does socioeconomic contention shape the ongoing process of political transformation in Egypt and Tunisia?* –, the empirical core of the research project is constituted by two in-depth case studies on precisely these two countries. The case studies consist of four main steps:

The studies start by *empirically assessing socioeconomic protests* since the fall of Ben Ali and Mu-barak. The time frame under investigation is the five years between early 2011 and early 2016. For an overall assessment, we rely on available protest event data²¹ in order to identify quantitative patterns (including the relative importance of socioeconomic protests vis-à-vis different kinds of protests) as well as to determine the main issues and the principal actors of socioeconomic contention. At this stage, we will also include data on the five years before 2011 in order to identify continuities and changes. Focusing on the post-revolutionary period, the main types of socioeconomic contention will be assessed in more detail through a qualitative content analysis of statements by representatives of contentious actors (in the media, in speeches, in official documents), complemented by semi-structured interviews. In accordance with the analytical framework in Table 1, the content analysis will assess demands for inclusion, autonomy, changes in economic and social policy as well as in the politico-economic order.

In a second step, we will *analyze the political reactions to socioeconomic contention*, which includes both the responses of individual polity members and the political regimes in general. On one hand, a content analysis of statements and documents assesses views on and responses to the contentious claims analyzed in the first step (including disagreements between polity members). On the other, by investigating actual political decisions and measures, we assess how regimes react: Do they offer inclusion to, and/or respect the autonomy of, contentious actors or are socioeconomic protests repressed by violent or non-violent means? To what extent do governments respond with policy concessions, i.e. with changes in economic and social policies or in the overall politico-economic order?

Third, we will bring these two actor-centered research steps together in an interaction-centered *investigation of the resulting dynamics of contentious politics*. Based largely on the data and the sources collected in the previous steps of the analysis, we will trace, in detail, the evolving interaction between contentious actors and the state with a view to the fourfold range of options outlined in Table 1. Process-tracing will serve to reconstruct the causal mechanisms that shape these dynamics.

Continuing process-tracing, the fourth research step consists of *identifying the impact of socioeconomic contention on the overall process of political transformation*. As outlined above, we will assess whether the given dynamics of contention produce effects (a) on the patterns of political participation and institutional representation and (b) in terms of political responsiveness and social justice. The overall analysis for the individual countries will be deepened by sub-case studies on macropolitically significant instances of socioeconomic contention (to be identified in previous research steps).

At each of these steps of the research process, results on Egypt and Tunisia will be compared and contrasted with insights from South America and, in particular, from Argentina and Bolivia. Based on the individual case studies and the comparative analysis, broader conclusions will be drawn that concern the peculiar dynamics of contention over socioeconomic issues (compared with contentious politics shaped by other kinds of claims) as well as the specific dynamics, relevance and polit-

21 Most suitable for our purposes is the Armed Conflict Location & Event Data Project (ACLED), available at <<http://www.acleddata.com/about-acled>> (cf. Raleigh et al. 2010).

ical consequences of socioeconomic contention in times of political transformation (compared with the dynamics and consequences of contention in contexts of relative political stability).

Finally, the research project also includes a policy-oriented dimension. Therefore, results of both the individual case studies and the comparative analysis will be used to build scenarios depicting prospective interplay between socioeconomic contention and political transformation in Egypt and Tunisia in the future. Policy recommendations will suggest how social and political actors in the two countries as well as external actors might contribute to building an inclusive and peaceful order in Egypt and Tunisia.

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