

Dear fellow PPWers,

The following is an article based largely on Ch. 4, and parts of Ch. 3 of my recently defended dissertation “Struggling to Learn, Learning to Struggle: Strategy, and Structure in the 2010-11 University of Puerto Rico Student Strike.” This version was submitted to (and rejected by) *Mobilization*. It’s currently under revision and will be submitted to other peer-reviewed publications soon. Some version of it will also be presented at the Puerto Rican Studies Association conference at the end of October. I would appreciate any comments, suggestions, and observations that could help make it better.

José

**‘Not a motor, but a lever’:
Leadership Competition and Expansive Learning in a
Student Anti-Austerity Movement**

This article looks at leadership competition in the 2010-2011 University of Puerto Rico student strike. I argue in certain cases, competition can stimulate a process of expansive learning. In the context of neoliberalization, movement performances become strained by simultaneous demands to display “worthiness” and “unity” on one hand, and “commitment” and pressure on the other, an apparent tradeoff that functions as a recurring dilemma. In such an environment, tight-knit, ideologically committed, and tactically flexible cadre organizations competing for a leadership role within a broad movement field can help keep “on the table” repertoires that other actors might be eager to discard, so long as they do so through democratic deliberative processes. My interviews of members of the Union of Socialist Youths shows that by functioning in this way, cadre offered the movement grassroots tools through which they confronted their recurring dilemma, allowing them to act effectively at decisive switchpoints.

What is the role of political organizations in movements like this?

To give the necessary tools to the movement so that it can carry out its struggle, such as . . . from the theoretical, from understanding why a process has to take place, to understanding self-defense and how to carry it out, carry out resistance. Educating, all of the resources one might need, from a megaphone, anything.

—Yari (interview)

The political [cadre] organization is not the motor of history. The organization is, at its best, a lever. When it successfully inserts itself into the fissures that accumulate within its context, it can force them open, make the pain be felt more strongly, make us more conscious of what's going on. . . To conceive political practice as an educational and self-educational process, a critical and constructive process. That political practice-as-pedagogy is what, in its best moments, the UJS was able to do.

—Francisco (interview)

In *Dynamics of Contention*, Douglas McAdam, Sidney Tarrow, and Charles Tilly assert that “[n]early all episodes of contention produce a mechanism of *competition for power*,” (2001: 67; emphasis in the original). Together with diffusion, repression, and radicalization, competition is one of the mechanisms that contribute to polarization, which has been widely studied as a nearly inevitable process especially relevant at the tail end of movement cycles (Tarrow 1989; see also Kriesi, Koopmans, Duyvendak, and Giugni 1995; Koopmans 1993). By and large, competition has been seen as leading to demobilization, whose effects can be cushioned by other mechanisms such as brokerage (McAdam et al. 2001: 70). However, empirical studies show that under certain circumstances, diverse tactical repertoires, often including disruptive and confrontational actions, are the most effective (Taylor and Van Dyke 2004: 280-281). Marshall Ganz argues that diverse “sources” of leadership (both “biographical” and “organizational”) contribute to this result, because “they add to the whole team’s skills, its flexibility, and its capacity for bricolage” (2009: 17).

In this article, I challenge the dominant association of leadership competition with movement decline using evidence from my study of Puerto Rico’s anti-austerity student

movement during the two-phase episode known as the 2010-2011 University of Puerto Rico (UPR) student strike (Laguarta Ramírez 2016). Drawing on my interviews of members of the Union of Socialist Youths (UJS), a leftist student cadre organization that has been active at the UPR for over four decades, I argue that the competition between multiple leadership teams actually contributed to what Ganz calls the *strategic capacity* of the movement as a whole. This is due largely to the fact that cadre organizations, and the UJS specifically, kept “on the table” for democratic deliberation framing and tactical repertoires that under conditions of neoliberalization would otherwise have been either discarded altogether or pursued without discussion. Using the framework of Cultural-Historical Activity Theory (CHAT), I suggest that by doing so, cadre facilitated a process of *expansive learning* where the grassroots participants could critically examine alternatives in ways that allowed them to act flexibly and effectively at critical *switchpoints* during the strike sequence. Although this process was not always expansive and the strike inevitably declined and ended, in interaction with the movement’s opponents within the university and broader polity it led to the eventual concession of every one of the striker’s major demands, in a stunningly unprecedented outcome.

The Dynamics of Strategic Learning

This article joins the growing body of literature that over the past few years has sought to re-approach two concepts that have remained understudied or undertheorized in the field, despite their crucial importance to numerous contemporary social movements: *organization* and *leadership*. This neglect was at least partly a result of the declining relevance of the large, bureaucratic “social movement organizations” once privileged by scholars (Soule 2013; Barker, Johnson, and Lavalette 2001), and partly a result of a

budding fascination, among activists and scholars alike, with the idea of “leaderless movements” (Castells 2012; Hanisch 2001; Purkis 2001). The proliferation of decentralized, “rhizomatic,” and participatory movements, in part facilitated by the emergence of social media technologies (Della Porta 2015), often gives the impression of a qualitative change in internal movement dynamics. However, movements have never been centralized, homogenous structures, but have always included “numbers of distinct organisations, groupings, and sub-networks, all of varying character . . . at once both differentiated and unstably unified, assembling diverse subjects around shared projects of social transformation” (Barker et al. 2001: 4).

The question of leadership and organization, in one form or another, is an unavoidable and inherent aspect of movement dynamics because “social movements” are not in themselves unitary entities that can identify and act cohesively, yet to achieve their purposes they must achieve a minimum of coherence. Collective identities, organizational forms, and courses of action must be proposed by the movement’s diverse participants; in such proposals, the question of leadership arises in one form or another as individual and complex actors with varying levels of experience, resources, and skills, as well as diverse identities, interests, and aims, all seek to influence each other. As Colin Barker and John Krinsky have observed, citing Antonio Gramsci: “everyone is an intellectual, but not everyone performs the *function* of an intellectual, so in movements not everyone performs the *function* of a strategizing leader” (Barker and Krinsky 2009: 12; emphasis in the original). To acquire the capacity and “coherence” to do so is often experienced by “subalterns” as a first step in overcoming the powerlessness of their “lived reality” (Krinsky 2013: 111-115). In short, movements are complex, variegated “communities,”

“activity systems,” or *fields* within which different types of actors, including more or less formal organizations, compete for a leadership role (Barker 2014; Diani 2013; Staggenborg 2013).

Two of the most contentious aspects of leadership competition are the collective identities or “we-feelings” that bring individual movement participants to the field and sustain continued participation (Polletta and Jasper 2001), and “defining the right opportunity to act and the right way to respond” (Rutten 2008: 13; see also Gamson and Meyer 1996; Zald 1996). Although scholars often distinguish between identity frames and action repertoires, both aspects are central to the interactive process of *framing*, through which actors (re)organize their world according to cognitive/emotional “frames” that make action meaningful (Snow and Benford 2005). In at least one critical elaboration of the framing model, not only is the production of meaning always contested, but contentious collective action frames are seen as discursive *repertoires* of “fighting words” (Steinberg 1999). Repertoires are historically specific, modular “constellations” of interactive, claims-making *performances* (Tilly 2008; 1998). According to Charles Tilly, since the emergence of the modern social movement, contention in the form of direct action has declined dramatically. Instead, as part of modern movement performances, actors make claims on opponents and audiences through displays of “worthiness, unity, numbers, and commitment (WUNC)” (Tilly 2008: 122). However, disruptive, confrontational, or violent actions intended to coerce, threaten, embarrass, or otherwise “pressure” opponents are clearly still integral to many social movement repertoires (Taylor and Van Dyke 2004: 280; Gamson 2004: 258). It may, therefore, make sense to speak of “WUNCP” displays instead.

Disruptive action is sometimes associated with one type of organization that has been particularly understudied of late, despite its continued widespread presence in a variety of geo-historical settings: the tight-knit, tactically flexible, and ideologically cohesive *cadre organization* (Piven and Cloward 1979 [1977]). Cadre are a less formalized variant of what some resource mobilization scholars used to call “movement entrepreneurs” (McCarthy and Zald 1977), differentiated from other movement participants in possessing the accrued resources of long term organization, but also in that they are purpose-driven communicators of the kinds of strategic proposals discussed above. In this sense, each individual cadre is a “leader.” Cadre organizations aspire to be “leadership teams” in Ganz’s sense, but within a much larger field. First theorized extensively by Vladimir Lenin as a network of secretive cells more suited to the highly repressive context of tsarist Russia than the Western European mass membership social-democratic party (1999 [1961]), cadre organizations were later posed by Richard Cloward and Frances Piven as an alternative to traditional social movement organizations, better suited to mobilizing the disruptive resources of the “poor” while avoiding the oligarchic pitfalls of mass bureaucracies (1984: 595-597). Other scholars have observed how at key moments, cadre can help broker connections between grassroots activists focused on local issues and broader, longer term national or regional coalitions (Rutten 2008; Boudreau 2001).

A possible step towards bringing leadership and organization back into social movement research is to incorporate the insights of CHAT, an analytical framework that posits human subjects learn “expansively” through interaction with others and the mediation of symbolic/practical *tools* (sometimes called “artifacts” or “instruments”),

including language (Engeström and Sannino 2010).¹ As applied to social movements, CHAT would recast most mechanisms as either *activities* or tools, and actors and arenas (both movements and their opponents, including individuals) as nested and interacting *activity systems* (Barker and Krinsky 2009). In addition, taking a cue from Lev Vygotsky’s concept of the “zone of proximal development”—the gap between a subject’s current capacity and its current potential, often defined by what it can achieve with the aid of a “more capable peer”—CHAT suggests that subjects learn by overcoming themselves, in struggle with their own internal contradictions (De Smet 2015; Vygotsky 1978). In a contested movement field, where participants with uneven capacities, different mediating tools, and sometimes diverging long-term objects try to influence each other (some more self-consciously than others), leadership “competition” is a contest to play the role of capable peer. The point here is not that cadre organizations and other self-consciously contending leadership teams necessarily *are* “more capable,” but that in attempting to influence others, they provide the tools through which the movement learns as a whole.

A fruitful methodological application of CHAT might adapt Yu-Sheng Lin’s recent characterization of movement strategizing as “reiterated problem-solving” to suggest that what a movement subject experiences as *recurring dilemmas* are in fact the unresolved contradictions between its current situation and capacities, its environment, and its constantly shifting object (Krinsky 2015; Engeström and Sannino 2010: 4-5). The interaction between two or more nested activity systems that leads from one decision-making *switchpoint* to the next, so that what appear as patterns of recurring (as opposed to “contingent”) dilemmas (Lin 2015: 293-295, 306) within one activity system are

“structuring” effects of broader, ongoing long term activity systems such as capitalism (processes such as neoliberalization being, ultimately, a type of activity within global capitalism whose effects reverberate within more localized systems). As a number of scholars have noted, “actually existing neoliberalism” offers a range of “softer” and “harder” variants (Muehlebach 2012; Boltanski and Chiapello 2006; Brenner and Theodore 2002; Jessop 2002), shaped not least of all by interactions with movement challengers; some have even suggested understanding it as a “social movement from above” (Nilsen and Cox 2014). What is crucial is whether specific elite or state activities correspond, in a generally coherent way, to the major repertoires of neoliberalization (Krinsky and Simonet 2011).

The Political Economy of Recurring Dilemmas

The 2010-2011 UPR student strike was a direct response to austerity policies aimed at satisfying the criteria of the “big three” credit rating agencies (CRAs) at the heart of the contemporary transnational credit regime (Sinclair 2005; Hackworth 2002; Sassen 2000). A colonial possession of the United States since 1898 (Rivera Ramos 2007 [2001]; Burnett and Marshall, eds. 2001), neoliberalization was well underway in Puerto Rico, and at the UPR, since at least the early 1980s (Laguarta Ramírez 2016: 81-129; Rosario Luna 2014, 2009; Vélez Cardona 2008, 2002; Torres Rivera 1999), under administrations of both the pro-status quo, “soft neoliberal” Popular Democratic Party (PPD) and the pro-U.S. statehood, “hard neoliberal” New Progressive Party (PNP). Early in 2009, the recently elected PNP administration of then governor Luis Fortuño, enacted a “fiscal emergency” law commonly known as “Law 7,” allowing it to temporarily override labor legislation and public-sector contracts for a period of two years in order to

lay off up to 30,000 public-sector workers (around 17% of the public workforce). Law 7 was Puerto Rico's first legislation explicitly drafted on the pretext of avoiding a further downgrade by the CRAs. Although the Law explicitly "exempted" the UPR, it affected the institution by excluding it from receiving any of the new revenue generated by special measures in the law. The elimination of fee waivers that set off the first phase of the 2010-2011 strike was an austerity measure intended to accommodate that shortfall, while the \$800 "Fiscal Stabilization Fee" that set off the second phase aimed to secure a new institutional bond issue (Kaske 2010).

The existing empirical literature suggests four general trends in the way neoliberalization affects potential challengers' repertoires. First, neoliberalization and austerity provoke the proletarianization and precarization of broad swathes of the population, generating grievances that can be attributed as a threat to be confronted. On the other hand, the structural position of traditional labor and other organizations is weakened and fragmented by the new-found transnational mobility and flexibility of capital, raising the specter of easy replacement and the general cost of protest (Della Porta 2015; Eckstein 2006; Offe 1985). Second, non-workplace arenas for class struggle open up among the new urban poor and working classes (Spronk 2015; Eckstein 2006), and potential allies appear among disenfranchised urban "middle" classes (e.g., self-employed professionals; management; small businessowners) opening possibilities for new coalitions and inclusive, "all-embracing" identities (Della Porta 2015: 89-105). On the other hand, new actors have contradictory grievances, agendas, resources, collective identities, and tactical preferences that may at times inhibit mobilization, especially those with some stake in the status quo, who tend to control greater resources, including access

to media (Moreira Alves 2001 [1989]: 295-297; Moody 1997: 195-197, 208, 212).

Combined, the first and second trend suggest that movements against neoliberalization will tend to be broad, inclusive, heterogeneous, and diverse, but also potentially fraught with internal schisms based on identities, interests, and tactics.

Third, neoliberalization advances its own “common sense” that obscures the roots of crisis in capital accumulation itself (Nilsen and Cox 2014; Harvey 2005; Gramsci 1971). Both ideological and disciplinary mechanisms promote an individualistic ideology of consumer empowerment, entrepreneurial success (in its ascendant phase), and debtor risk and guilt (Lazzarato 2012; Sklair 2001). The very heterogeneity that neoliberalization stimulates “gives movements a high level of ‘permeability’ by ideas drawn from without . . . including ideas emanating from their *opponents*” (Barker 2014: 9; emphasis in the original). Fourth, neoliberalization implies a “crisis of political responsibility” (Della Porta 2015: 110-156): traditional political opportunities close as heavily indebted states become less responsive to popular demands and decision-making power shifts even further away from local arenas and towards credit rating agencies, international financial institutions and other transnational actors (Eckstein 2006; Robinson 2004). Neoliberal “winners” are insulated from accountability (Aalbers 2013), while excluded populations are controlled through militarized policing and surveillance (Wacquant 2009). On the other hand, all of this contributes to the moral outrage, redefinition of participatory democracy, and sense of being part of a global struggle that are at the heart of contemporary anti-austerity movements (Della Porta 2015). Combined, the third and fourth trends suggest that movements resisting neoliberalization may be particularly vulnerable to the internal disruptions, manipulation, and co-optation that

moves some movement leaders to *converge* with their opponents (see for example Collins 2011), even as institutional unresponsiveness and repression lead others to *radicalize*, adopting more confrontational tactics.

What the above summary suggests may be specific to neoliberalization is a kind of dynamic that simultaneously demands and inhibits disruptive confrontation, so that polarization appears as a tradeoff right from the start. In the language of James Jasper's taxonomy of dilemmas, the tradeoff presents a combination of the "extension dilemma" (breadth, attention, and resources, versus the coherence among those willing to incur costs and risks), and the "naughty or nice?" (or means) dilemma (the ability to persuade and attract versus the ability to threaten or deceive) (2004: 7-10; see also 2006). Some scholars have observed that in relatively open, low intensity polyarchic contexts, effective mobilization requires some combination of disruptive threat and persuasion (McAdam and Su 2002). The trends outlined above suggest that neoliberalization complicates this balance, particularly under "hard" neoliberal repertoires. In Tillyan terms, WUNCP displays become strained, as different audiences respond to inversely correlated degrees of worthiness/unity and commitment/pressure.

How did the repertoire of neoliberalization in Puerto Rico specifically pattern the "choices" facing the constantly evolving, century-old UPR student movement? The first trend outlined above is easily confirmed. As in the U.S. and other deindustrializing economies, Puerto Rico's union density steadily declined from the 1970s up until the present, in direct correlation with the loss of its privileged access to the U.S. market, and the resulting collapse of manufacturing (Rosado Marzán 2007; Pantojas-García 1990). By the late 1990s, Puerto Rico's labor movement had all but disappeared in the private

sector, remaining strong mainly in the state-owned utilities. Sour debates between unions affiliated to U.S.-based “internationals” and more militant, independent rank-and-file unions that openly accused them of accommodating neoliberalism illustrate the resulting polarization (Ayala and Bernabe 2007: 297-299; Conferencia Sindical 2007 [2001]). The second trend in the political impact of neoliberalization can be seen in the alignment of important segments of the pro-independence left, another traditional student ally, with the pro-status quo PPD.² Certain pro-independence leaders who had openly advocated such support began to openly discourage and oppose protests that could be seen as damaging to the PPD. This gradual shift in part reflects the broader, contradictory class positions and shifting political allegiances of the professional, commercial and managerial middle classes, discussed above, because in Puerto Rico, the traditional pro-independence leadership has historically been dominated by members of these sectors that have experienced some sense of displacement by U.S. interests (see, for example, Ferrao 1990).

Student cadre whom I interviewed argued these processes affected both the broader political environment leading up to the 2010-2011 UPR strike, and its internal dynamics, given not only that the labor and pro-independence movements have been important allies of the student movement, but also that faculty and employee unions play an important role in campus conflict mediation, and that many students belong to the professional and managerial sectors by either background or aspiration, as the UPR is Puerto Rico’s foremost center of professional training. In addition, my interviewees attested to the crisis of political representation at the UPR and the progressive internalization of the neoliberal consumer/debtor common sense among the student body

during the years leading up to the strike, which together with the dynamics described above contributed to constraining mobilization. Their stories also highlight the personal and collective threat posed by Law 7, the inclusive identities and participatory democratic process developed during the strike, the moral outrage caused by institutional unresponsiveness and repression, and the sense of being part of a global struggle, as elements that contributed both to mobilization and to the learning curve of the strike process (Laguarta Ramírez 2016: 113-128).

Switchpoints of the 2010-2011 UPR Student Strike³

When the Fortuño administration approved Law 7, in early 2009, the three main leftist student cadre organizations at the Río Piedras campus were the UJS, International Socialist Organization (OSI), and September 23 Youth (J23), in addition to a handful of others.⁴ The PPD youth and sectors friendly to the PPD also became active, now that the PNP was back in office. At the initiative of the UJS and OSI, two campus anti-austerity campaigns that had developed at Río Piedras during the 2008 fall semester merged into a broad Committee in Defense of Public Education (CEDEP) intended to link campus mobilization to the broader resistance against austerity. A group of left-leaning students law students created a Law Students' Action Committee (CAED). Another broad Committee Against Homophobia and Discrimination (CCHD), formed in response to mistreatment of LGBT students at local businesses, also opposed austerity policies on and off campus.

October 15, 2009 – National “paro” and student sit-in

In the midst of rising tensions, the public sector labor unions called for a national *paro* (a work stoppage of pre-defined duration, as opposed to an indefinite strike or

huelga) demanding the repeal of Law 7, to be held on October 15. On September 28, a general assembly of the student body at Río Piedras approved a 24-hour *paro* on the next day, “in preparation” for October 15. At that assembly, the J23 proposed the idea of creating “action committees” (CAs) at each of the Río Piedras campus’s colleges, echoing the initiative of the recently-founded CAED. The administration’s response was to shut down the campus during the entire week of October 15, preempting students’ plans to hold a second *paro* on that day in support of the broader mobilization. On that day, as many as 80,000 people marched through the heart of San Juan’s business and financial district. One group of marchers, which included UPR students, occupied and paralyzed traffic on the expressway. When riot control and mounted police called on protesters to disperse, CAED members staged a sit-in, which lasted several hours until the police allowed them to disperse without arrests. It soon became evident, however, that the traditional labor movement leadership would not continue to mobilize.

March 10, 2010 – Occupation of the Academic Senate

The student movement continued to agitate against austerity on campus into the spring semester. Then, on March 10, the Social Sciences CA called for a picket in front of the iconic UPR clock tower, organized to protest the newly appointed interim UPR President Ramón de la Torre during his first appearance at a session of the Academic Senate. The protest grew so unexpectedly large that organizers decided to walk in and occupy the senate hall, where they held an impromptu assembly in which many of the strategic elements that eventually became part of the strike were first discussed.⁵

Organizations and grassroots committees that had been working separately began to meet consistently and coordinate actions, overcoming mutual prejudices and making the strike

a real possibility for the first time. Those meetings in turn produced a public debate between competing strategic positions. After one such meeting failed to produce a consensus, the UJS put out a public statement announcing that it would propose an indefinite strike at an upcoming student general assembly, demanding that the Board of Trustees repeal its recent “moratorium” on tuition waivers for honor students, athletes, musicians, and employee families.⁶ In response, the CAED issued a statement insisting that the position of all the CAs was that an indefinite strike was as a measure of “last resort” (2010). A UJS member replied in an “open letter” that no such position had been agreed to, arguing that a diversity of tactical repertoires would enrich the process to come (García 2010).

April 13 – Río Piedras student general assembly

The debate continued at the assembly itself, on April 13, where it was the OSI’s proposal of a 48-hour *paro* accompanied by an ultimatum, to be followed by an indefinite strike, that carried the day (not the UJS’s appeal for an immediate strike), despite the opposition of the CAED and the J23. A negotiating committee was created, which included representation from the Río Piedras student council, each of the CAs, the CAED, and the CCHD. The assembly was therefore the switchpoint that properly initiated the strike sequence, setting off a wave of strike declarations that eventually included all 11 UPR campuses, leading to the creation of a National Negotiating Committee.⁷ The strike itself began on the dawn of April 21, with violent confrontations between campus security guards and students trying to shut the access gates to the Río Piedras campus. The administration responded to the student takeover with almost immediate police presence outside, especially at Río Piedras, and continued

unresponsiveness, refusing to recognize any interlocutor other than the student councils. However, the overwhelming popular response was supportive of the students, and media coverage was widely positive, focusing on the flourishing of cultural expressiveness and participative democracy within the occupied campus.⁸ This political climate gradually forced the administration (first President De la Torre, then the Board of Trustees) to agree to meet with student negotiators.

May 13 – Administration-sponsored Río Piedras general assembly

After only about a week of meetings between the Board of Trustees and the negotiating committee, the student council organized an assembly off campus without consulting the *pleno* (the strikers' main deliberative body), following a spate of paid advertisements by the administration announcing that an "agreement" resolving the strike had been reached. Student negotiators, however, claimed that the only thing they had agreed to was preliminary accord on the rules of the negotiation. The overwhelming majority of those present at the assembly voted to ratify the accords and continue the strike and negotiations, an unexpected outcome even for cadre, which breathed new life into the process and decisively swung the balance in the striker's favor for the first time. This attempt to end the strike prematurely was followed a move that further galvanized the movement and its supporters. When students returned to the Río Piedras campus, they found it entirely surrounded by police, declaring that nobody (including supporters bringing food and water to strikers still inside) would be allowed to enter or leave. The immediate public reaction was a massive demonstration of support for the students outside the main gate that made it impossible to enforce the prohibition.

June 9, 2009 – Central Administration sit-in and occupation

On June 9, the administration abruptly left the negotiating table, declaring it had already conceded all that it could.⁹ Student negotiators from the Mayagüez, Cayey, and Humacao campuses (none of whom had previously been members of cadre organizations) staged a sit-in preventing the trustees from leaving the UPR Central Office building. Almost instinctively, hundreds of strikers and supporters surrounded and occupied the building, provoking yet another tense standoff with police that was only resolved when the trustees agreed to resume negotiations the following Monday. On that day, the lower court judge overseeing a countersuit by the UPR against student leaders “recommended” that the parts submit the dispute to voluntary mediation.¹⁰ On June 16, a bare majority of the Board of Trustees finally signed a document agreeing to all of the students’ core demands, which was ratified by the first ever UPR system-wide student assembly June 21, officially ending the occupation and first phase of the strike. June 9 had been the tipping point that signaled to those trustees not beholden to the governing party (those appointed by the previous, PPD administration) that the movement could not be contained without increasing repression to unacceptable levels.

During the course of the first phase of the strike, however, student negotiators had discovered that the administration planned to implement an \$800 “fiscal stabilization fee” at the start of the following semester. One of the final agreements that ended the first phase of the strike was that said fee would not be implemented in the fall, albeit without any guarantees after that. Most cadre understood that this meant that a new strike would be necessary after a brief respite to regroup and “rebuild” the movement, although the exact timing of this second phase was uncertain. In turn, the Fortuño administration, learning in turn from defeat, quickly changed the law to restructure the Board of Trustees,

allowing it to gain full control of the highest body of the UPR administration.

November 18, 2010 – Student referendum rejects fee

The first major switchpoint on the road to the second phase of the strike was a secret-ballot student referendum where voters massively rejected the stabilization fee. Holding the referendum was part of a plan proposed by the UJS at the November 11 Río Piedras general assembly, aimed reconnecting with the broader student body. A second assembly held on December 1 approved a 48-hour *paro* beginning one week later, to be followed by an indefinite strike after another week.¹¹ When the morning of December 14 arrived, the campus had been occupied by the Police, enforcing a ban on student protest now authorized by the Supreme Court.¹² This far more violent phase was limited by and large to Río Piedras, where some professors continued to hold classes, particularly in the College of Natural Sciences. In order to face the challenges posed by the scenario of an “open gate strike” (unseen at the UPR since 1981), the strikers designed a plan they called *entra y sal pa’ fuera* (“go in and bust out”), whereby students would attend classes as scheduled, then walk out in unison and join a march through the campus, with specially designated “security groups” in charge of specific tasks such as disrupting classes with resistant professors, and drawing police attention away from the marchers. This repertoire was relatively successful at disrupting classes. In response, the administration declared a recess of the fall semester, to be resumed on January 11.¹³

January 11, 2010 – Unplanned disruption leads to civil disobedience

A strong comeback was planned for that day, with dual activities. Following an authorized, formal ceremony honoring Puerto Rican educator Eugenio María de Hostos, the bulk of the striking students marched through the campus together with faculty,

employees and other supporters, in a direct challenge to the campus protest ban. Simultaneously, a small group of masked protesters was designated to disrupt administrative offices that were to open that day. However, the latter activity spun out of control, generating unforeseen property damage and broadly negative media coverage. The resulting repressive response was “much greater than what we had been prepared for” (Ian Camilo, interview). Concerned about negative coverage, the *pleno* unauthorized the further use of masks.¹⁴ The following day, the campus was once again completely occupied by the police, and numerous strikers were arrested simply for handing out leaflets, which some attributed to their inability to protect their identity as a result of the new self-imposed prohibition.

As a result, the student leadership opted for a new track, inaugurating a repertoire of civil disobedience, consisting of large sit-ins obstructing access to the campus. However, reduced confrontation did not produce reduced levels of repression, as police applied painful bodily pressure on demonstrators in order to arrest them in large numbers. The new repertoire reached its own limits when strikers attempted to perform it on the steps of the capitol on January 27, resulting in an all-out police riot when the sheer number of demonstrators present made targeted arrests impracticable. The end of the civil disobedience sequence left a core of radicalized strikers unable to act effectively, violently or nonviolently, within a campus hermetically controlled by police.

February 9, 2010 – Violence results in call to withdraw police

The week and a half or so between that date and the following switchpoint were marked by uneventful tension. As several interviewees told me, the consensus within that remaining core was to find any excuse to “stir things up,” which wasn’t difficult. My

interviewees narrated incidents of police harassment, especially of female strikers, during this time, including the groping of arrestees, catcalling and blowing kisses, and following them into the bathrooms. On February 9, this situation erupted when an exchange of words between strikers and police filming a sidewalk slogan-painting activity became an all-out melee. Media coverage, which included footage of police breaking protocol and mistreating arrestees, was relatively positive for striking students. The faculty and employee unions immediately declared themselves on strike, demanding the removal of police from campus. That weekend, tens of thousands marched in support of that demand. In one of the stunning reversals of the whole process, President De la Torre publicly stated that the police should go as well, and was immediately asked to resign. However, by that point, all that was left to keep the strike going was an exhausted and dwindling, yet intensely committed, radical core. A student general assembly was called for February 22. The mood at the assembly, although unequivocally deferent to the strikers, was clearly for ending the strike.¹⁵ The UJS's proposal to temporarily suspend the strike on a high note, with a series of mobilizations and consciousness-raising activities, was approved.

March 7 – Chancellor Guadalupe attacked

Before all the activities could be carried out, the second phase of the strike turned one final corner. During a scheduled demonstration on March 7, strikers learned that Chancellor Ana Guadalupe was presiding a meeting on campus, and moved their protest to the building where she was. In the scuffle that ensued when UPR security guards attempted to remove her, the Chancellor was treated roughly. Media coverage and public opinion then turned decisively against the strike, which finally collapsed from sheer

exhaustion, not without having first badly battered the legitimacy of the Fortuño administration. The PNP would go on to lose the 2012 election, and securing a promise by all five opposition parties to repeal the fee, which the incoming PPD administration finally did in June 2013.

The 2010-2011 UPR Expansive Learning Sequence

While various first-hand observers of the 2010-2011 UPR student strike have expressly noted its “pedagogical” character (see for example Rosario 2015; Seale Collazo 2012), thus far none had examined the role of leadership competition in the learning process or attempted an expansive learning analysis. Yet the, as the following testimony from a sympathetic faculty member shows, there is a strong case to be made for the strike as a process of mutual learning.

Within the occupied Río Piedras campus, the need to maintain unity meant that in practice, the more combative student sectors had to remain accountable to those less inclined to throw stones or conceal their faces . . . the latter, for their part, had to recognize the legitimacy of more risky tactics. An example of this dates to roughly midway through the [first phase of the] strike, when several dozen masked students took over the security gate, through which the chancellor and other administrators had been entering . . . Later, one of my acquaintances in the student movement—who had opposed the security gate takeover—told me how the groups that had been advocating for it had gone around to all six camps, lobbying for support and eventually crafting a collective decision which, as far as I could tell, worked well: with the students in control of all the entrances, conflict over researchers’ access to their laboratories ended (Seale Collazo 2012: 14).¹⁶

Different sectors of the student movement (and its supporters) learned from each other as they negotiated and managed differences.

The vignette above also neatly illustrates the central theme of the movement’s internal debates. One position, best represented by the CAED (especially during the first phase of the strike), advocated allowing negotiations and legal proceedings to take their course with a minimum of confrontation. Thus, for example, the communiqué criticizing the UJS announcement that it would unilaterally propose an indefinite strike at the April

13 assembly, includes an exhortation to build a “mature” and “unified” movement (CAED 2010). In Tilly’s words, one that could project “worthiness” (in the eyes of the media, administration, and middle-class “public opinion”), “unity,” and perhaps therefore draw the greatest “number” of supporters.

In contrast, the UJS and other cadre organizations advocated a combination of negotiations and tactics that would both keeping the “pressure” on the administration, and keep the core of strikers active, alert, and “committed.”

[Some of us] defended not discarding any method out of hand. [We argued] that to really advance in the strike process we needed to exert pressure, and part of that was breaking with what at a certain point became the quotidianity of the strike, the normalization of being on strike [during the first phase], and we understood that to move forward in reaching some sort of agreement, we had to generate a problem for the administration and government . . . as an institution, as the public authority, as the entity called upon to control the reins of society (Ian Camilo, interview).

The UJS reply to the CAED communiqué summarizes the two positions, as they stood about one month prior to the outbreak of the strike, thus:

I think it’s great that on the one hand the UJS is “playing hardball,” making a call for an indefinite strike, and on the other the CAED is inviting the president to a dialogue at the Law School.¹⁷ As far as I know, the CAED didn’t ask anyone for permission to have a dialogue with the president. The CAED believes that is right and necessary, and has done it, and I congratulate them. The victory we want will emerge from this combination of tactics (García 2010).

Nearly echoing Ganz, radical cadre defended their own “tactical autonomy” by making the case for diversity as a source of strategic capacity.

The two positions were present in debates over more specific tactical repertoires during the first phase, including the decision to strike itself, whether or not to secure the campus gates physically or take activities “off campus” in order to have a more personal contact with the public and pressure decision-makers more directly. During the more confrontational second phase, despite the reduced relevance of broader ideological or “class” differences (most of the CAED, for example, ceased to participate actively),

debates continued—even within radical cadre organizations—over tactics such as the timing of the strike itself, disrupting classes, the use of masks, the switch to civil disobedience, and the decision to “suspend” the strike. Although much of the language of the debates changed (the need to re-establish a connection with the student body, as opposed to projecting “maturity,” for example), the basic dilemma at the heart of these debates remains the same: how to build a movement field that is simultaneously broad and coherent enough (“numbers” and “unity”), and militant enough (“commitment” and “pressure”) to be effective in terms of shared objectives (Laguarda Ramírez 2016: 158-169).

This apparent tradeoff, the “recurring dilemma” of the UPR student movement during the 2010-2011 strike, is palpable at all of the switchpoints in one form or another, exacerbated by its interaction with opponents’ (and allies’) repertoires. That interaction, in turn, comes into sharper focus if each is understood not just as subject, but as a nested “activity systems” with conflicting objects, each with their own internal leadership contests, diverse mediating tools, “rules,” and “divisions of labor.” This produced contradictory effects in terms of the student movement’s “internal” dynamics. On the one hand, the unrelenting unresponsiveness of the “hard neoliberal” PNP tended to radicalize the movement core, while the contradictory (and changing) position of the “soft neoliberal” PPD, ambivalence of left-leaning professionals and aspiring professionals within the movement itself, and constrained or co-opted situation of movement allies within the labor movement, all tended to stimulate convergence.

In the CHAT tradition, social movement “dilemmas” are accounted for in terms of a *double bind*, “a social, *societally essential dilemma which cannot be resolved*

through separate individual actions alone – but which in joint co-operative actions can push a historically new form of activity into emergence” (Engeström and Sannino 2010: 5; emphasis in the original). Perhaps more pointedly, in its social-psychological definition, which informs CHAT, the double bind (often associated with schizophrenia) results from contradictory injunctions, where that the subject is unable to respond to one “successfully” without “failing” at the other. While this is often a false choice, the subject is unable identify the contradiction by addressing either “alternative” separately, because they are typically presented at different levels of abstraction (the classic example is one where the choice-giver’s body language or behavior contradicts a spoken command or prohibition) (Bateson 1972). In an “expansive learning cycle,” once a subject identifies a double bind, she undergoes successive stages of modeling, examining, implementing, reflecting on, and consolidating a new practice that “resolves” the dilemma. In this way, a subject gradually overcomes her zone of proximal development. As the subject learns, her opponents are also learning, and her object itself can be moved by others (the displacement of the students’ demands by their allies, in favor of police withdrawal, after February 9) or transformed by the discovery of deeper contradictions (a fiscal stabilization fee lurking behind a simple austerity cuts). Thus, the completion of each learning cycle opens the development zone anew (Engeström and Sannino 2010: 8-12; Vygotsky 1978).

The space between each of the switchpoints described in the previous section can therefore be seen as a learning cycle. Continuing interactions both within the movement activity system, and without (with allies, audiences, and opponents) made persistent contradictions between the movement’s capacities and its shared immediate object (the

repeal the elimination of fee waivers, or the stabilization fee) resurface in the form of the double bind exacerbated by neoliberalization (“Don’t disrupt/confront!” “I will not budge unless you disrupt/confront”). Not all of the decisions and actions taken were decisive in terms of the strike’s trajectory, not all of them successfully “solved” the problem at hand, and not all of them were “expansive” insofar as they did not necessarily lead to a qualitative expansion of the movement’s capacities (this is certainly true of the last switchpoint in the episode, the March 7 attack on chancellor Guadalupe). However, each represents an attempt to overcome the double bind. Just as “solutions” often lead to the resurgence of a recurring dilemma at some later point, “failures” can also be the doorway to “success.” For instance, the demobilization of the broader anti-austerity movement on October 15 opened the door to the student strike sequence. The strike, in turn, while it eventually came to an end (as all movement episodes do), generated the political climate for later “success” when the fee was eventually repealed.

Throughout this process, movement participants attempted to influence each other, forming distinct, competing (although sometimes overlapping) leadership teams. More or less coherently, formally, or successfully, each leadership team offered their resources (including larger networks, skills, and experiences), interpretive frames and tactical/identity repertoires to guide the broader movement. These, which Ganz sees as the “biographical sources” of strategic capacity, are what CHAT calls the mediating tools (sometimes “artifacts” or “instruments”) through which expansive learning takes place. In Ganz’s model, when combined with “regular, open, and authoritative” deliberation, freely accessible resource flows, and accountability (the “organizational sources” of strategic capacity, which in contemporary CHAT models are accounted for as “rules” and

“division of labor”), these tools contribute to the motivation, knowledge, and interpretations available to the movement as a whole (Ganz 2009: 13-19). My research confirms that during the 2010-2011 UPR student strike, the UJS not only defended a diverse and flexible tactical repertoire, its “class struggle” frame helped to motivate and sustain the involvement of an important cross-section of the movement (often first-generation working-class students without prior connections to the Puerto Rican left), and contributed a broader, longer-term view of the context in which it developed (including an analysis of “neoliberalism”). My interviewees also report being attracted to the UJS’s profound sense of commitment and “calling,” its “freedom of tendency,” and its knowledge of and connections to broader struggles (Laguarta Ramírez 2016: 175-180).¹⁸

The deliberative and decision-making scaffolding around which this process took place was not only “regular, open, and authoritative,” but democratic, horizontal, and transparent (Laguarta Ramírez 2016: 181-184). The *representative* authority of the student councils, which the administration initially insisted on certifying as the student’s only legitimate leadership, was recognized, but checked by the *participative* authority of the assemblies and *plenos*.¹⁹ These sites were born almost entirely from the initiative of cadre organizations, through concrete practical situations, putting into practice the lessons learned from the experience of previous processes by older cadre.

Before I was in the [UJS], I was a militant of the CEDEP, which was organized by *compañeros* from the OSI and the UJS. And I also participated in the Humanities CA, which was organized by *compañeros* from the J23 and the OSI. And I still haven’t seen a grassroots committee, a broad committee, where you can’t find people from political organizations. Because there need to be folks with a political project in order for these structures to emerge (Tere, interview).

The options presented to and decided upon by the *pleno* were delineated by multiple and overlapping leadership teams that regularly met on their own to discuss strategy: the CAs,

negotiating committees, student councils, and organizations (formal or not). Among these, cadre were especially well positioned to influence the discussion, as their members also participated within broader teams at different levels of the nested structure.

These processes were not one-directional. Cadre are also continually learning from their interaction with grassroots participants. In the context of the 2010-2011 UPR students strike, we can note that at times, cadres' "radical habitus" and "protest capital" (Taylor and Van Dyke 2004: 277-278; see also Bourdieu 1990) sometimes predisposed them against more persuasive or "movement building" tactics in ways that ran contrary to expansive learning (we can see this clearly at the end of the second phase, when the OSI and a sector of the UJS insisted on maintaining the strike when it was no longer sustainable). More to the point, grassroots participants repeatedly and unexpectedly took the initiative at decisive switchpoints, often surprising and surpassing cadres' own disposition to act (on May 21, June 9, and February 9, at least). These are textbook examples of expansive learning, where the subject uses the tools offered by a "capable peer" for overcoming on her own the bar set with the peer's help.

Concluding Remarks

Throughout the 2010-2011 UPR student strike, formal organizations and informal groups functioned as leadership teams, which competed to shape the movement's collective identity frames, tactical repertoires, and overall strategic outlook. The most coherent among these competing frames offered a "language" or "toolkit" for movement participants to grasp the significance of their participation. Contrary to both the standard social movement cycle view that links competition to demobilization, and that which suggests leaders and organizations are things of the past, the movement's ability to cohere was made possible, not by a "unified" frame that everyone agreed to, but by the

tactical autonomy that allowed diversity to flourish within a wide array of participative, horizontal, and transparent decision-making structures. Those structures, and that autonomy, which propitiated a process of expansive learning at each of the major switchpoints in the sequence, were for the most part conceived of and actively promoted by members of cadre organizations like the UJS, as part of their long-term strategic vision.

How generalizable are these findings? Few polities anywhere exhibit the peculiar mix of core and periphery that is strikingly evident in Puerto Rico. And yet, this is precisely what makes the case so compelling. Puerto Rico's uniquely contradictory situation as a highly urbanized, high-consumption, rapidly deindustrializing, polyarchic, highly indebted colony of the world's major capitalist power is ideal terrain for identifying dynamics particular to neoliberalization. Key areas for comparison and further research include the diverse patterning effects of different neoliberalizing repertoires, the specific "internal" and "external" limits or constraints to expansive learning, and the dynamics of collaboration and competition.

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¹ Based on the writings of Marxist-inspired developmental psychologists Lev Vygotsky and Aleksei Leontiev, among others, CHAT was first popularized by educational researcher Yrjö Engeström. “Dialogical” linguists Valentin Vološinov, Pavel Medvedev, and Mikhail Bakhtin, and are often discussed as important additional influences. The Italian philosopher and revolutionary Antonio Gramsci is often cited by proponents of integrating CHAT to social movement studies (see for example Barker 2014).

² In 2004, the small, center-left Puerto Rican Independence Party’s candidate for governor received 50,000 votes less than in the previous election (nearly half of the votes received in 2000). The PPD candidate won by scarcely over 3,500 votes, with nearly 7,000 “mixed” PIP-PPD votes (marking the PIP’s insignia, but the PPD’s candidates) disputed by the PNP (Ayala and Bernabe 2007: 312). The practice was previously known, but never as clearly a decisive factor as in 2004.

³ The following is a summary of Laguarda Ramírez 2016: 130-185. Additional narratives with a different focus can be found in Rosa 2015; Rosario 2015; Everhart 2014; Atilés-Osoria 2013; Rosario 2013; Everhart 2012; Stanchich, ed. 2012; and Atilés-Osoria and Whyte 2011.

⁴ For a comprehensive analysis of the historical dynamics of the UPR student movement prior to 2009, see Laguarda Ramírez 2016: 39-80, 186-214.

⁵ These included, “the idea that the strike had to include all 11 campuses, to eventually hold a national student assembly (which ended up happening towards the end [of the first phase]), that we had to negotiate with the Board of Trustees, not the president” (Ibrahim, interview).

⁶ Cert. 98, 2009-2010. Decried by the trustees as recently as February 24, the elimination of tuition waivers was by no means the spark that set off discussions about a future strike, nor immediately recognized as the banner that would rally the student body in the way that it did.

⁷ The first campus to go on indefinite strike was actually Humacao, after October 15, remaining on strike for two or three weeks. The Humacao campus would go on strike once more after Río Piedras went on strike on April 21, 2010, and remain so for the duration of the first phase of the strike (Francisco, interview). All but the Medical Sciences campus (where conditions are more complex) went on indefinite strike, after a few of them went through rocky and/or false starts. The students at the Medical Sciences campus declared a one day *paro* in solidarity, which was the first time in history that all 11 campuses have been paralyzed together, and were represented on the CNN.

⁸ The performative and “creative” character of the first phase of the strike has been widely documented and emphasized by many observers, occasionally contrasting that aspect to the second (see, for example, Rosa 2015; Atilés-Osoria 2013; Lynn Rosario 2013; Everhart 2012; Chaar López 2011a).

⁹ On May 27, during a massive march by UPR students from all 11 campuses to the Governor’s Mansion in Old San Juan, Governor Fortuño announced that he would order the removal of police officers from the surroundings of the Río Piedras campus, and proposed a seven-day time frame to settle the strike and a well-known Catholic Bishop to mediate negotiations. The CNN rejected the mediator, considering that it would delay unnecessarily delay the process, which then seemed to be progressing. However, on June 7, President De la Torre announced strikers had 24 hours to clear all 11 campuses and open the gates.

¹⁰ Two law students had sued the administration on the very first day of the strike, seeking a court order to force the administration to end the recess, under the theory that this would result in the removal of police stationed around the campus entrances. In response, the administration countersued all those student leaders it could identify, in an attempt to obtain a preliminary injunction ordering an end to the strike. The law students’ legal action, which eventually reached the local Supreme Court only to be declared “academic” because the recess had by then been lifted (*Moreno Orama & Farinacci v. De La Torre, et al.*, 2010 TSPR 70), has been portrayed by some observers as a legal strategy of the movement as a whole (see for example Atilés-Osoria 2013: 111), despite the fact that it was never discussed or approved outside of the CAED.

¹¹ The strike began with a preemptive 48-hour *paro* on December 7 and 8. On those days, campus security was outsourced to a private firm, which recruited manpower overnight with little or no training. By midnight on the morning of December 7, all access gates to the campus had been removed in order to avoid another student occupation. The preemptive *paro* thus began with intensely violent confrontations before the sun came up, media coverage of which was wildly unfavorable to students.

¹² The administration’s countersuit in *Moreno Orama & Farinacci*, 2010 TSPR 70, eventually produced a Supreme Court decision that declared the UPR to be a “semipublic forum” where authorities could regulate “the time, place, and manner” of otherwise protected expression. Following U.S. state and federal jurisprudence regarding *private* universities, the court argued students had no legal right to bargain collectively or strike, due in part to the “contractual nature” of the institution’s duty to provide services to

each individual student (*U.P.R. v. Laborde et al.*, 2010 TSPR 225; my trans.; my emphasis). The decision was published on December 13, 2010, on the day before the second phase of the Strike began.

¹³ The coordinating group elected in the November assembly attempted to remain mobilized over the holiday break with marches through a major shopping center and pickets of individual trustees' private offices.

¹⁴ It also disbanded the coordinating committee in favor of a more "representative" body, attempting to emulate the structure of the CAs during the first phase, a move that at least one of my interviewees considered a "mistake": without a student occupation there were no "gates" for CAs to represent, and constant confrontations with police did not allow for consistent deliberation (Francisco, interview).

¹⁵ Reflecting this apparent dissonance, an unlikely proposal was raised to "continue the strike" while taking classes. The proposal echoed ideas that had been floated by a group of faculty and students calling itself "University without Walls" throughout the second phase, which essentially held that what was important and radical was not the disruption of normal functioning, but to challenge the constraints on knowledge placed by capital and the state by creating novel situations like taking class in non-traditional settings (see, for example, Chaar López 2011b).

¹⁶ The Río Piedras campus has seven main vehicular access gates, six of which are adjacent to a different college within the campus where a CA had been organized. During the first phase of the strike, each CA was charged with "watching" its corresponding gate. The seventh gate, an entrance on the far side of campus located between the Law and Natural Sciences gates (known as "Gate 6.5," "the police gate," or "the security gate"), was adjacent to the offices of campus security, and the newly built, vacant General Studies building. Because the students had been unable to shut it down on the first day of the first phase, it was heavily guarded by police on the outside, and used not just by the natural science researchers conducting ongoing experiments who had been authorized by the student *pleno* to access their laboratories, but also security guards, contracted construction workers, and employees of Chancellor Guadalupe's office who were ordered to report to work.

¹⁷ The statement also claimed that the CAs were "arms of the student councils for the organization of student struggles," invited the public to an "open dialogue" with President De la Torre, and claimed that "our purpose is to exhaust the channels of dialogue before considering an indefinite strike as an option" (CAED 2010).

¹⁸ In the 1990s, the UJS and its "parent" organization, the Socialist Workers' Movement (MST) abandoned "democratic centralism," allowing dissident tendencies to organize and publicly express their opposition to the majority view. For a thorough discussion of the history of the MST and UJS, and the evolution of their strategic outlook, see Laguarda Ramírez 2016: 69-79.

¹⁹ The power of the student councils was limited to being represented on the negotiating committees and the authority to summon the general assembly, which is not negligible, since the assembly is the only body that can initiate and end strikes.