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# Boletim de Sumários

Boletim de Sumários

C.A.D.

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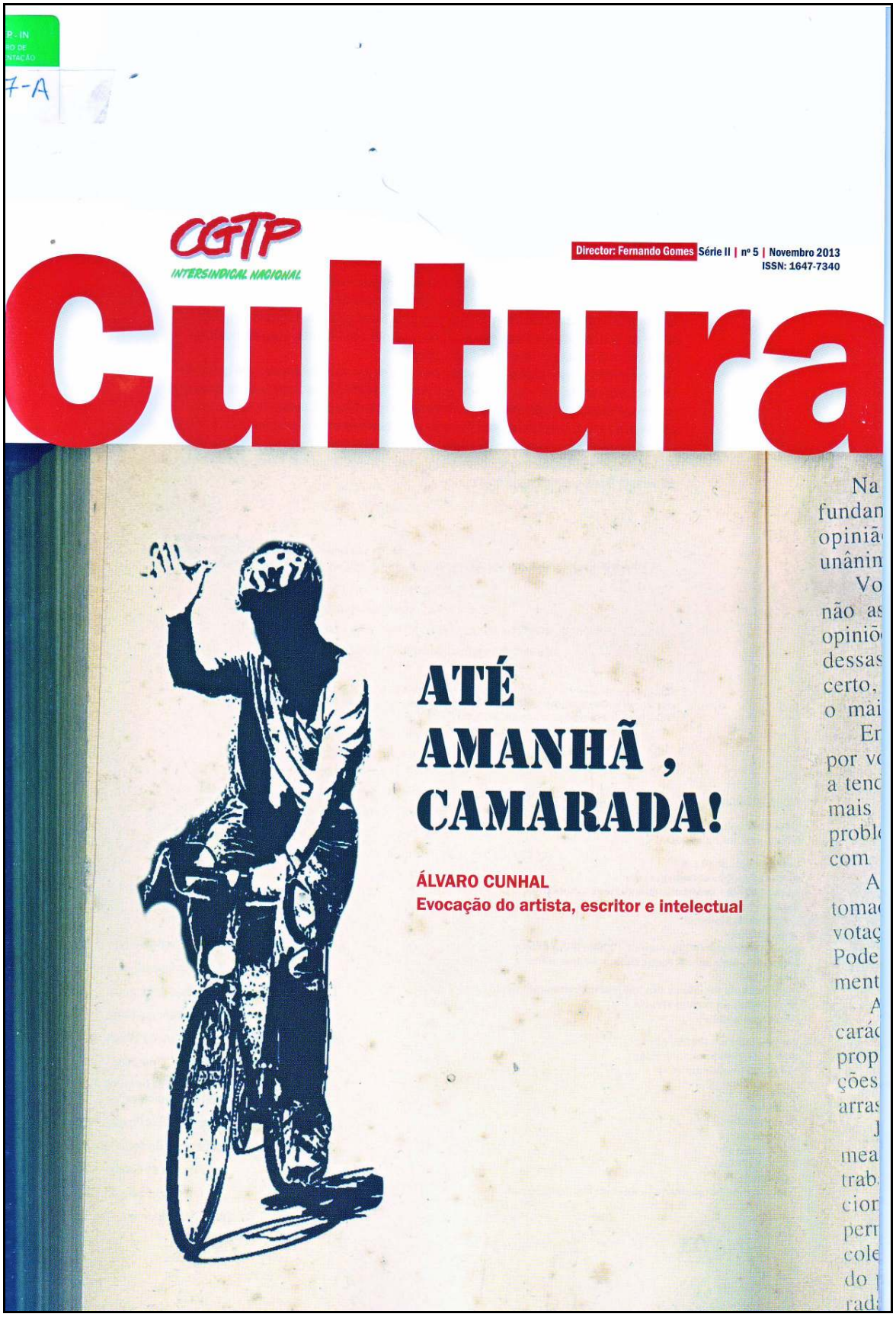
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Cultura
ATÉ AMANHÃ, CAMARADA!
ÁLVARO CUNHAL
Evocação do artista, escritor e intelectual

# Editorial

No ano em que se assinala o centenário do nascimento de Álvaro Cunhal, a CGTP-IN promove um conjunto de iniciativas que evocam o defensor dos direitos dos trabalhadores, com o empenho que dedicou ao estudo do sindicalismo, o seu labor enquanto intelectual que abordou a temática da sua vida, das suas dificuldades e da sua luta, mas também o combativo e corajoso antifascista. Uma delas passou pela reedição (2.ª) da intervenção proferida por Álvaro Cunhal, em 25 de Outubro de 1995, por ocasião do 25.º aniversário da CGTP-IN. Esta segunda edição, apresentada a 1 de Outubro passado, inclui um prefácio do Secretário-geral, Arménio Carlos, e um conjunto de fotos daquela sessão.

O *CGTP Cultura* associa-se a estas iniciativas, previstas no plano de actividades da CGTP-IN para este ano, destacando o multifacetado intelectual, artista e escritor que o pseudónimo *Manuel Tiago* evidencia.

Neste sentido, desafiámos o nosso colaborador regular nestas páginas, Domingos Lobo, a coordenar este número especial, convidando diversas personalidades da cultura portuguesa a reflectirem sobre a obra de Manuel Tiago, fazendo uma leitura actual do seu legado artístico. Ao Domingos e a todos os autores que colaboraram neste número, o nosso especial agradecimento.

Num momento de grandes dificuldades sentidas pelos trabalhadores e em que o desânimo, fomentado por uns, tolerado por outros, parece ocupar um lugar de destaque, concluo reforçando a actualidade da mensagem, da obra de Cunhal. Dizia ele, na intervenção a que fizemos referência, que, num quadro em que o capitalismo «[...] não só não resolve como agrava os grandes problemas dos trabalhadores e liquida direitos vitais que estes alcançaram com a luta, *o movimento sindical, como movimento de classe, é mais necessário que nunca.*»[1]

**Fernando Gomes**
*Membro da Comissão Executiva do Conselho Nacional*
*Responsável pelo Departamento de Cultura e Tempos Livres e Centro de Arquivo e Documentação da CGTP-IN*



[1] Cfr. *Ciclo de debates "CGTP-IN: 25 anos com os trabalhadores": intervenção de Álvaro Cunhal.* Lisboa: CGTP-IN – Departamento de Cultura e Tempos Livres; IBJC – Instituto Bento de Jesus Caraça, 2013, p. 26.

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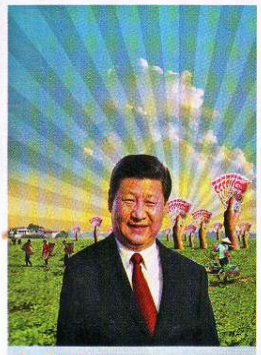

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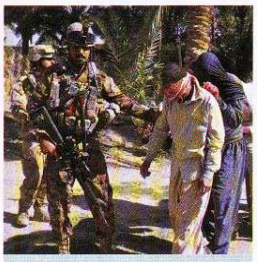

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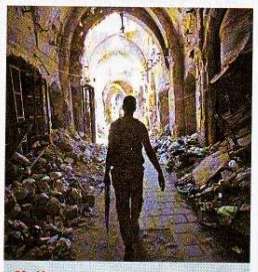

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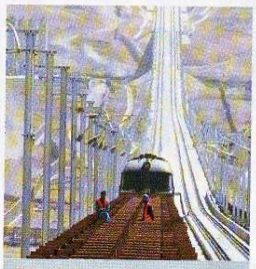

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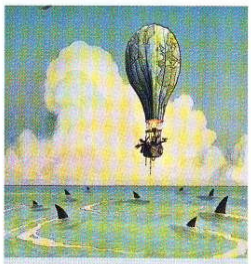

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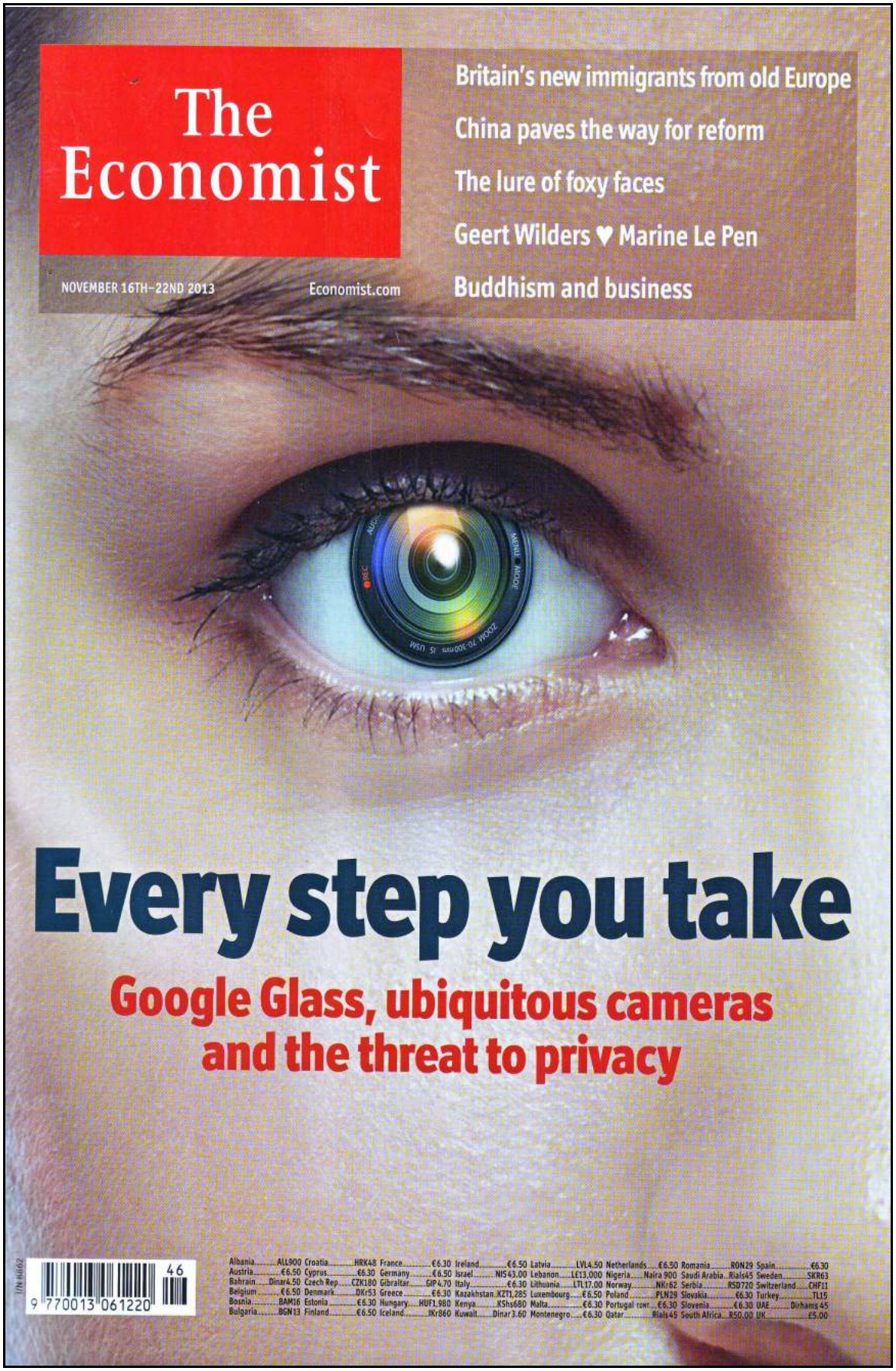
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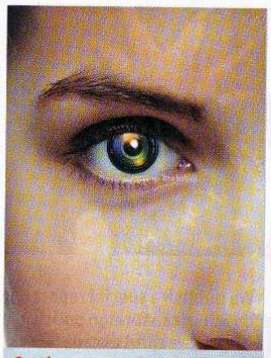

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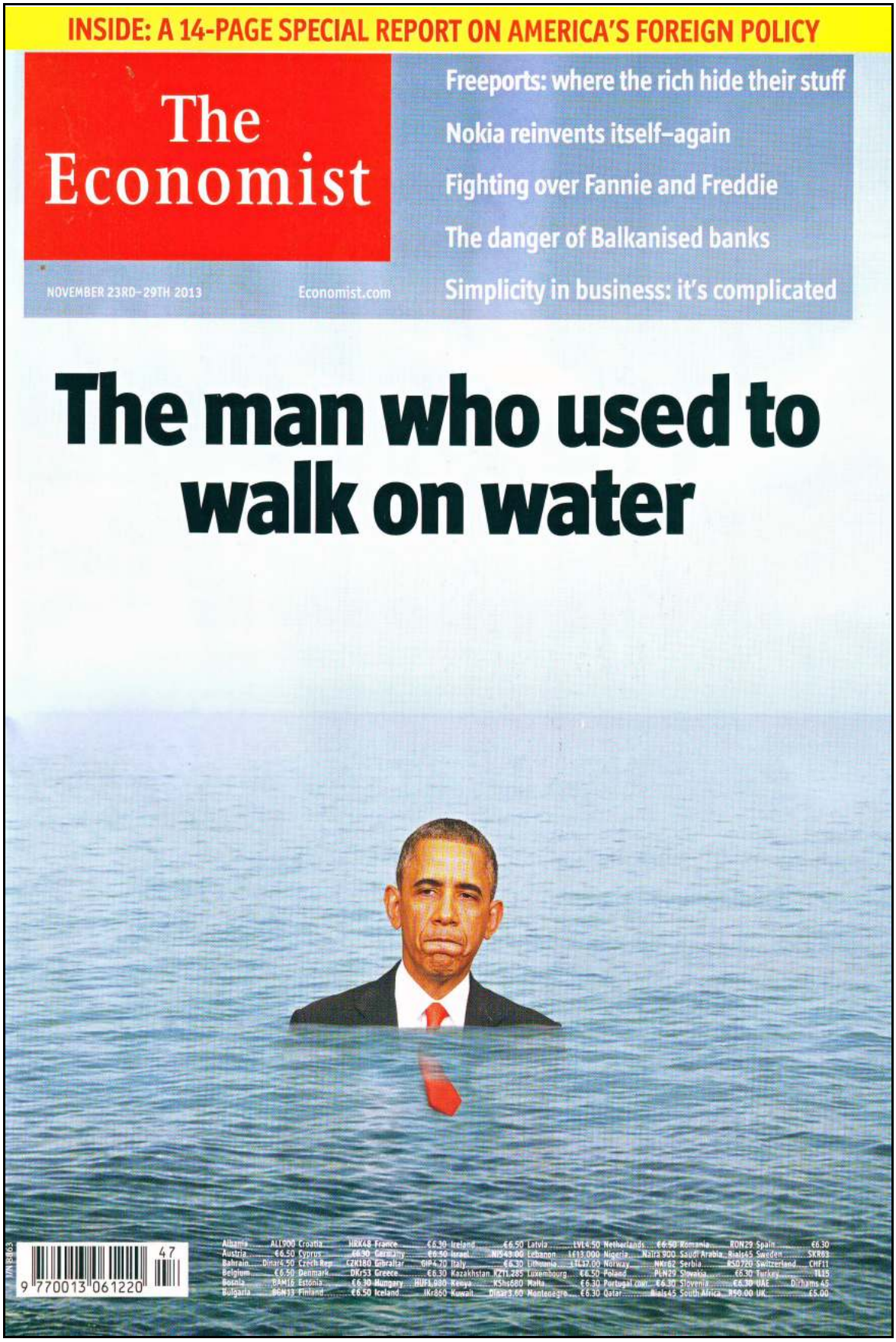
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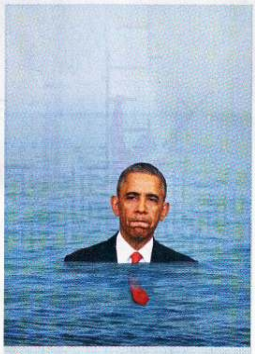

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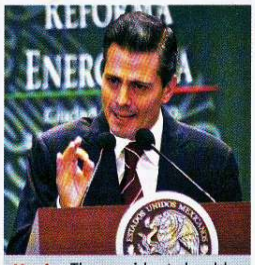

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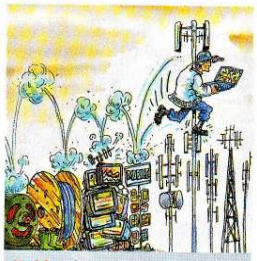

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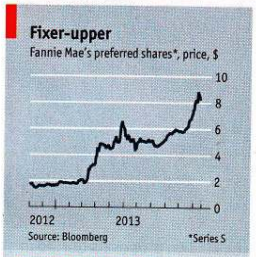


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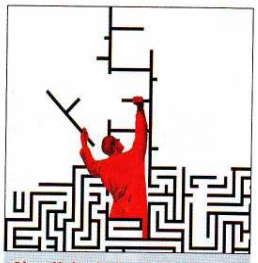

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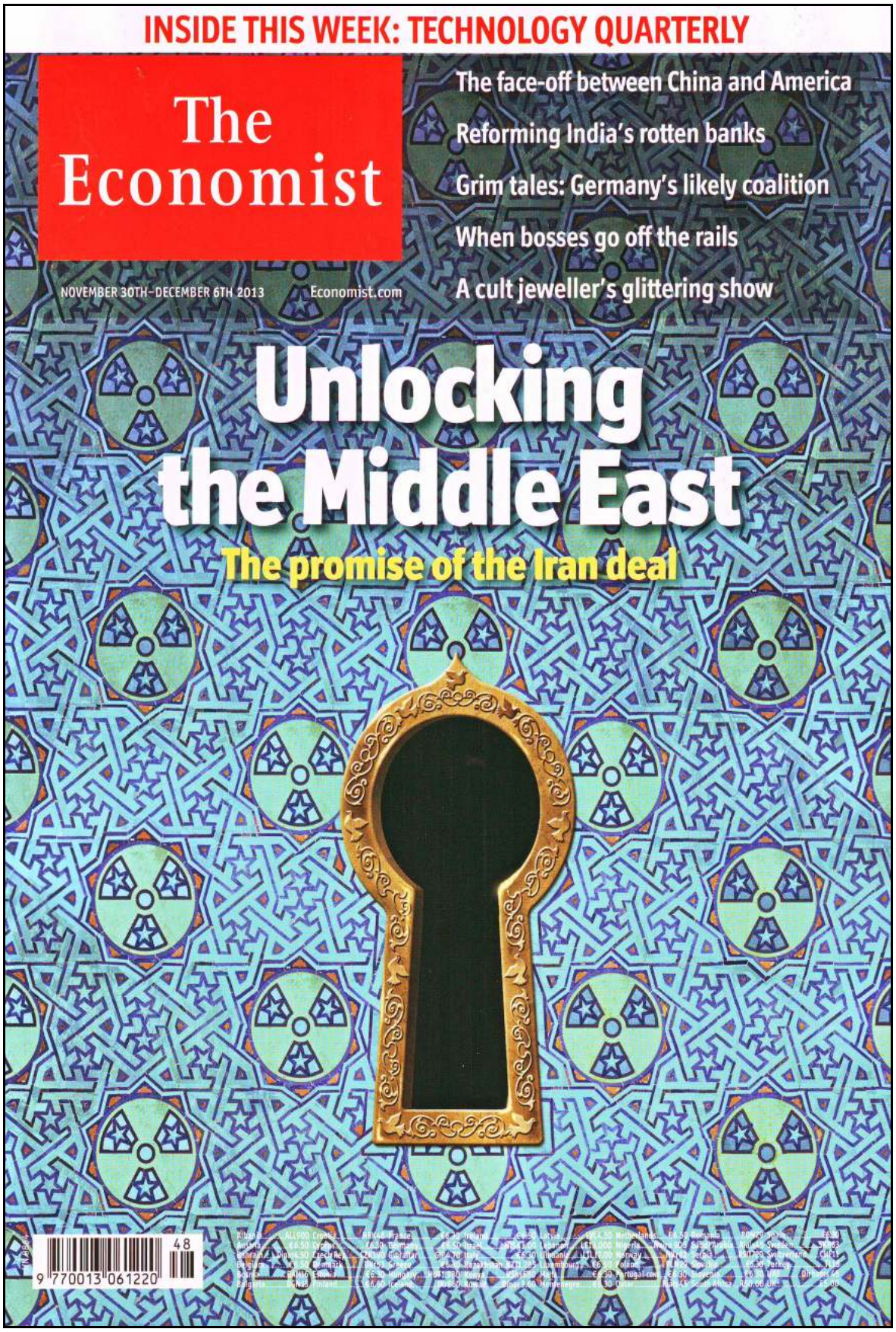
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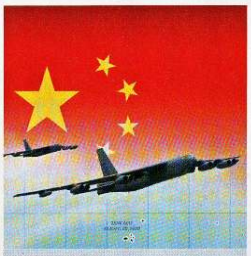

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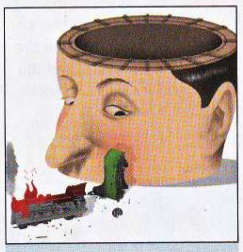

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está a crescer
Diálogo com o Governo é urgente
A nossa força vem da unidade

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## desce

### Portugal

A proposta de Orçamento do Estado para 2014, a chamada "reforma do Estado", o novo e ainda mais favorável estatuto dos privados, a prova de acesso a uma profissão a que os professores já pertencem, o desemprego q não para de aumentar e o salários sempre em rota descendente, os rankings que comparam o que não é comparável, o governo para quem a mentira é forma de estar, a crise qu leva milhares de famílias baterem no fundo mas qu num só ano, fez crescer e 11% os multimilionários o nosso país, a troika que já prepara programas de tro para o pós-troika, o Coelh e o Portas, o Crato, a Albu querque, o Maduro e todo os outros "Cabrais" que são falsos à Nação... A coisa está feia!

## sobe

### Portugal

Os tempos estão muito difíceis mas os portugues não baixam os braços. Fo assim em outubro, 19, em novembro, 8, foi assim co os trabalhadores dos trans portes, da saúde, da educ ção, com os trabalhadores da Administração Pública, das empresas públicas e o setor privado que não vira a cara à luta. São dificílima as condições para a luta, é verdade, desde logo as financeiras, seja para parti cipar numa greve, seja pa deslocar milhares a uma manifestação em Lisboa... tudo é verdade, mas as lutas continuam a passar por grandes manifestaçõe e por greves muito participadas, assim como por ou tras formas de ação, o que confirma que Portugal não perdeu a esperança e isso é um importantíssimo sina de futuro.

BPI

# Análise Mensal

13 de Novembro de 2013

## Mercados Financeiros

Paula Gonçalves Carvalho
Agostinho Leal Alves
Nuno André Coelho
Teresa Gil Pinheiro

### Onde está a desalavancagem?

- A generalidade dos indicadores continua a apontar para que o crescimento económico global regresse a patamares mais robustos, embora ainda moderados: a informação já disponível relativa ao comportamento do produto no terceiro trimestre de 2013 em várias economias relevantes na dinâmica mundial justifica algum optimismo, embora prudente, pois os desafios e riscos são ainda significativos. Efectivamente, o processo de recomposição de balanços ainda decorre, os níveis de endividamento permanecem elevados e, sobretudo, faltam factores catalisadores do crescimento. A fraca perspectiva de evolução da procura condiciona a realização de investimentos, mesmo em sectores e regiões onde se identificam amplos níveis de liquidez no balanço das empresas. Pela positiva, antecipa-se um pendor menos restritivo da política orçamental em 2014 - com destaque para as economias da União Económica e Monetária, para além da política monetária, que permanecerá acomodatícia num horizonte temporal alargado.

- A postura tendencialmente divergente entre os bancos centrais dos principais blocos económicos mundiais reforça a incerteza e a volatilidade no mercado cambial. Depois da acentuada correcção, na sequência da redução das taxas directoras na região do euro, o EUR/USD deverá estabilizar no curto prazo em torno da fasquia de 1.33; a médio prazo, a perspectiva de alargamento dos diferenciais de crescimento e taxas de juro é favorável ao dólar. Entretanto, a procura por rendimento reflecte-se na apreciação excessiva de algumas moedas da esfera de influência do dólar, com fundamentos mais robustos, podendo induzir arrefecimento e adopção de medidas pelos respectivos bancos centrais.

- O esgotamento dos instrumentos convencionais pelo BCE deverá reacender a discussão sobre a utilização de instrumentos alternativos ou não convencionais, pois a liquidez excedentária continua a encolher, bem como o balanço do banco central, em contraste com os seus congéneres. Neste contexto, aumenta a possibilidade de serem introduzidas novas operações de cedência de liquidez por prazos alargados. Nos EUA, a maior dificuldade de interpretação dos indicadores macroeconómicos (pós-*shutdown*) e a falta de acordo entre Democratas e Republicanos quanto ao caminho orçamental a seguir, sugerem uma via sinuosa até à concretização da retirada dos estímulos. No entanto, a Reserva Federal deverá pautar a sua actuação pelo comportamento dos dados económicos, que têm vindo a surpreender positivamente (o relatório do emprego de Outubro revelou criação sustentada de postos de trabalho no sector privado), sugerindo a possibilidade de que o início do processo ocorra num futuro não muito distante.

- Os mercados de taxa fixa permanecerão condicionados pela evolução das expectativas relativamente à política monetária nos EUA. Todavia, os preços dos *US Treasuries* estão mais vulneráveis a uma correcção, veja-se o alargamento sustentado do diferencial entre as taxas implícitas de 10 anos do dólar e do euro desde Maio. De facto, os mercados de dívida pública *core* da UEM deverão continuar relativamente protegidos pela postura acomodatícia do Banco Central Europeu e pela possibilidade de que sejam implementadas medidas adicionais de política monetária. Entretanto, os mercados da periferia beneficiariam também da concretização deste cenário, num momento crucial, em que dois dos soberanos sob maior escrutínio preparam o seu pleno regresso ao mercado primário de dívida pública.

- O processo de redução de estímulos nos EUA é inevitável, sendo discutível até que ponto já está incorporado nas expectativas dos investidores e nas valorizações dos activos bolsistas. É certo que a alteração da política monetária encontra também o seu reflexo num maior grau de robustez da economia real. Todavia, as valorizações dos principais índices são significativas - nomeadamente nos EUA - sobretudo desde o adiamento do momento da redução de estímulos, em Setembro. Neste contexto, face à pouca probabilidade que atribuímos a surpresas muito positivas pelo lado do crescimento, não se descarta a possibilidade de um movimento de correcção que poderá ter efeitos de contágio significativos, dado o papel dos activos bolsistas norte-americanos na liderança do sentimento de mercado.

- Nesta publicação incluem-se uma análise ao Orçamento de Estado para 2014 e um olhar estrutural sobre a receita e a despesa pública, no contexto internacional.

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### Onde está a desalavancagem?

A redução das taxas directoras pelo BCE constitui um sinal adicional de que as taxas de juro de curto prazo no mundo desenvolvido permanecerão baixas num horizonte de tempo prolongado, situação que estimula a formação de distorções financeiras, dada a dificuldade de medição apropriada do risco. Efectivamente, seis anos após a falência do Lehman-Brothers, observam-se alguns sinais preocupantes, entre eles o aumento significativo dos níveis de endividamento no sector empresarial não financeiro, designadamente em vários países europeus; o alcance de volumes máximos de emissão de dívida no mercado internacional por empresas com fraca classificação de *rating*, quer nos EUA quer na Europa; e o recurso crescente a instrumentos financeiros complexos, alguns deles na origem da crise financeira de 2008. Apesar dos progressos na recomposição dos balanços das famílias em alguns países (EUA e Portugal, por exemplo), a verdade é que os níveis de alavancagem globais continuam a crescer.

É num contexto de ritmos de crescimento económico e inflação historicamente baixos e níveis de endividamento persistentes que surgiu recentemente o apelo de vários quadrantes à prática de políticas de estimulo da procura interna pela Alemanha, o país com maior capacidade de financiamento externo, tendo ultrapassado a China.

Nos mercados financeiros, a conjuntura continua propícia à tomada de risco. No entanto, deverá regressar em breve alguma volatilidade, fruto da incerteza gerada pelo elo de ligação entre o comportamento dos dados económicos e a postura da Reserva Federal.


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2013

AN INDEPENDENT SOCIALIST MAGAZINE

Britain's Noxious History of Imperial Warfare

JOHN NEWSINGER

Cambodian Political History —The Case of Pen Sovann

LUKE YOUNG

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*Accumulation by Agricultural Dispossession*

FRED MAGDOFF

*Reviews*

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There is a pressing need for a coherent left strategy on climate change and in relation to the planetary environmental threat in general. The current scientific consensus indicates that we have at best several decades before the earth's average surface temperature rises by 2°C, viewed as the point of irreversible climate change. This means that decisive action must be taken quickly if the world is not to go off the planetary climate cliff.

We therefore read with considerable interest Christian Parenti's article, "A Radical Approach to the Climate Crisis" in the Summer 2013 issue of *Dissent*. Parenti's main thesis is that since the time with which to address the climate change problem is so short, "it is *this society* and *these* [existing capitalist] *institutions* that must cut emissions. That means, in the short-term, realistic climate politics are reformist politics, even if they are conceived of as part of a longer-term anti-capitalist project of total economic re-organization."

Parenti follows this up with a discussion of what he considers the practical measures that might be pushed in the United States as part of rational climate politics, including: (1) a carbon tax; (2) barring that, the EPA using the Clean Air Act to impose a "de facto climate tax"; and (3) what he calls a "Big Green

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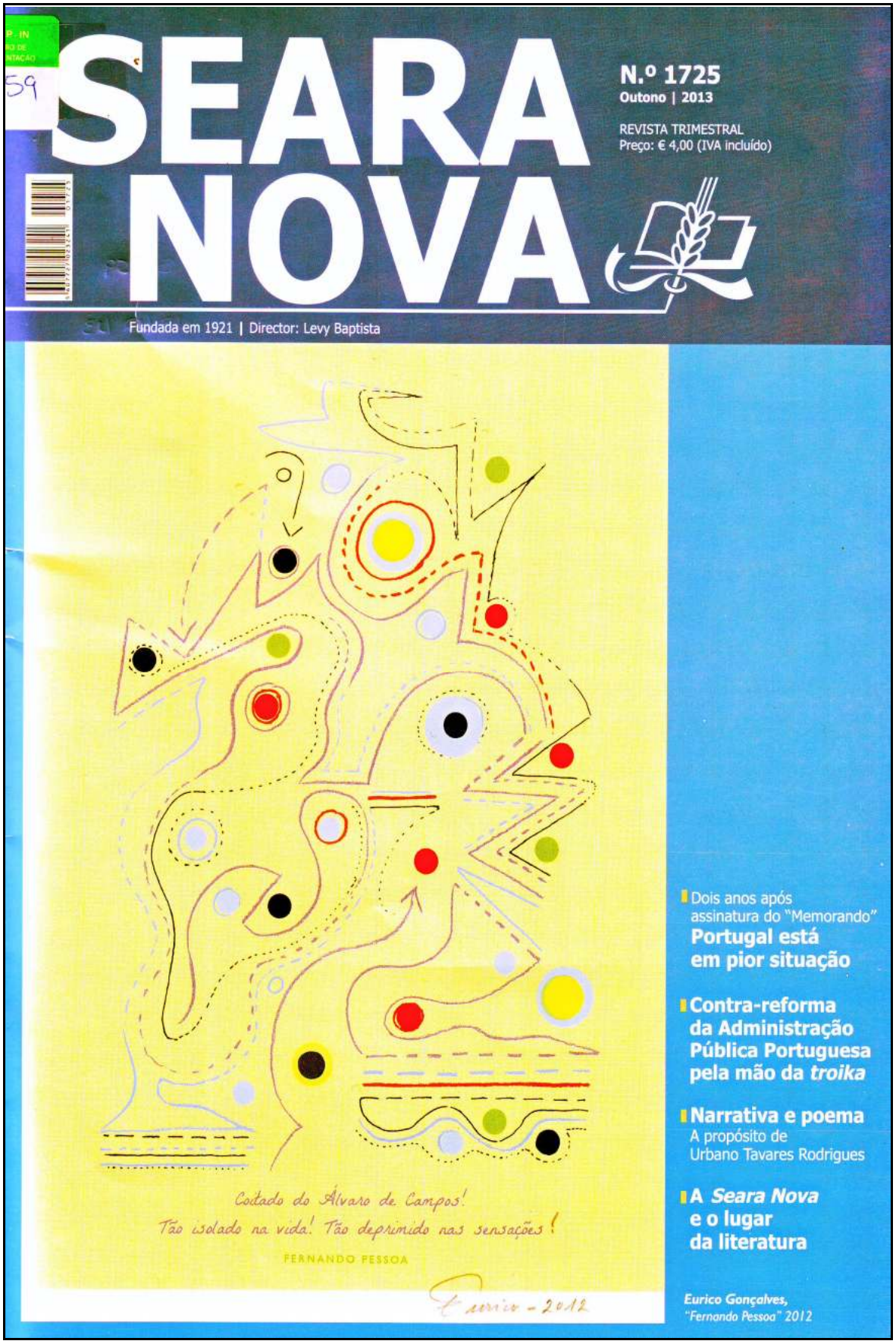
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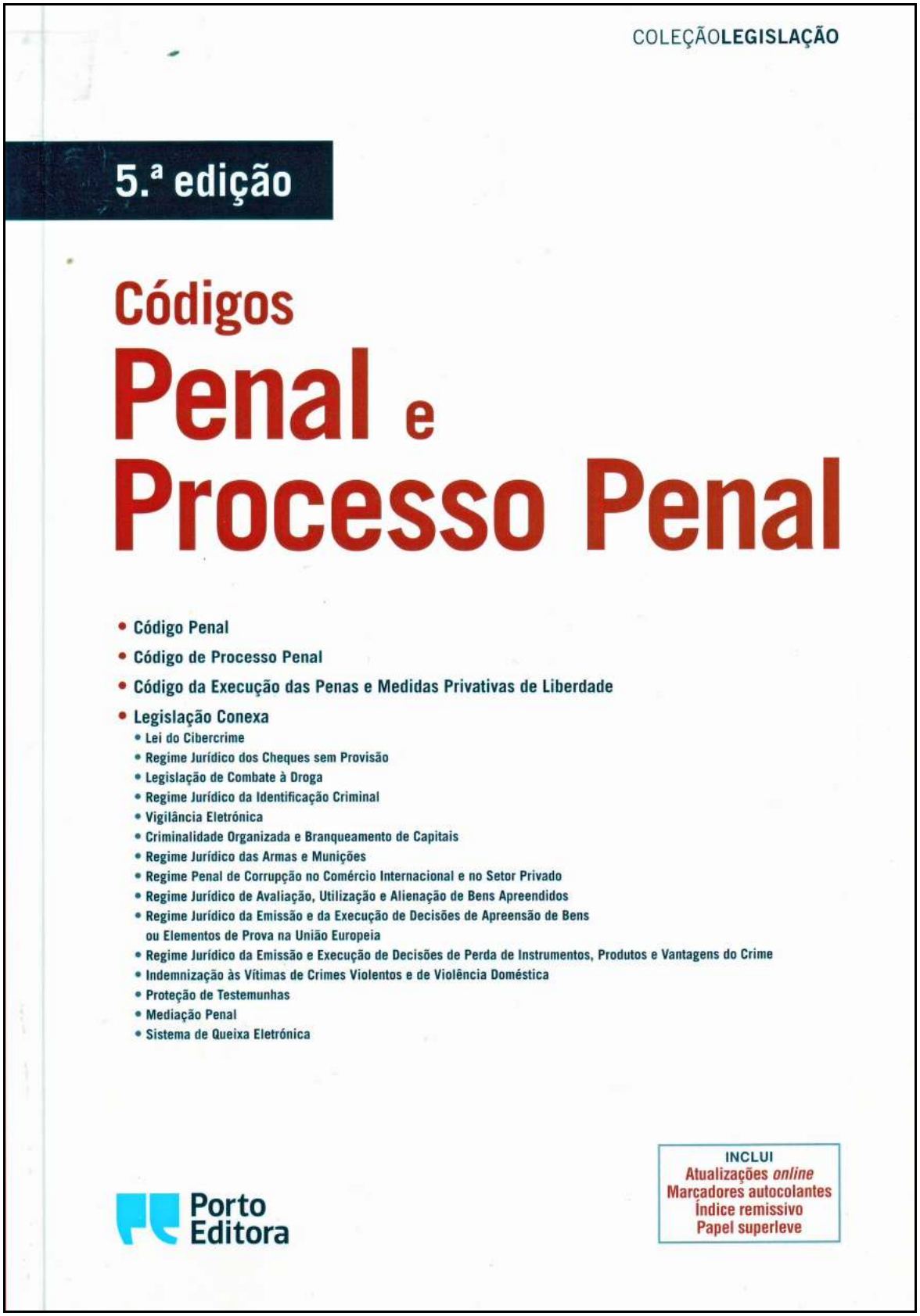
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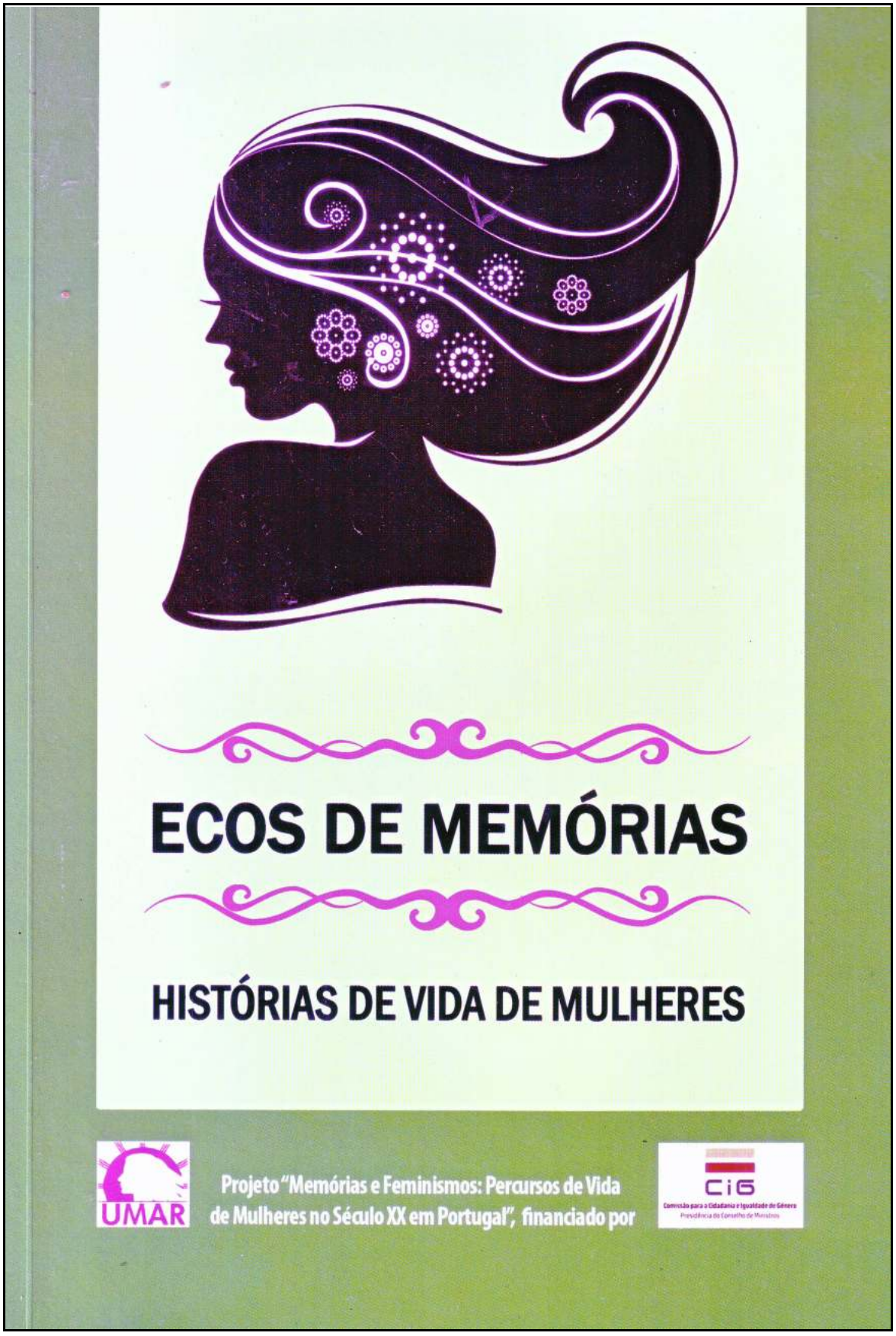
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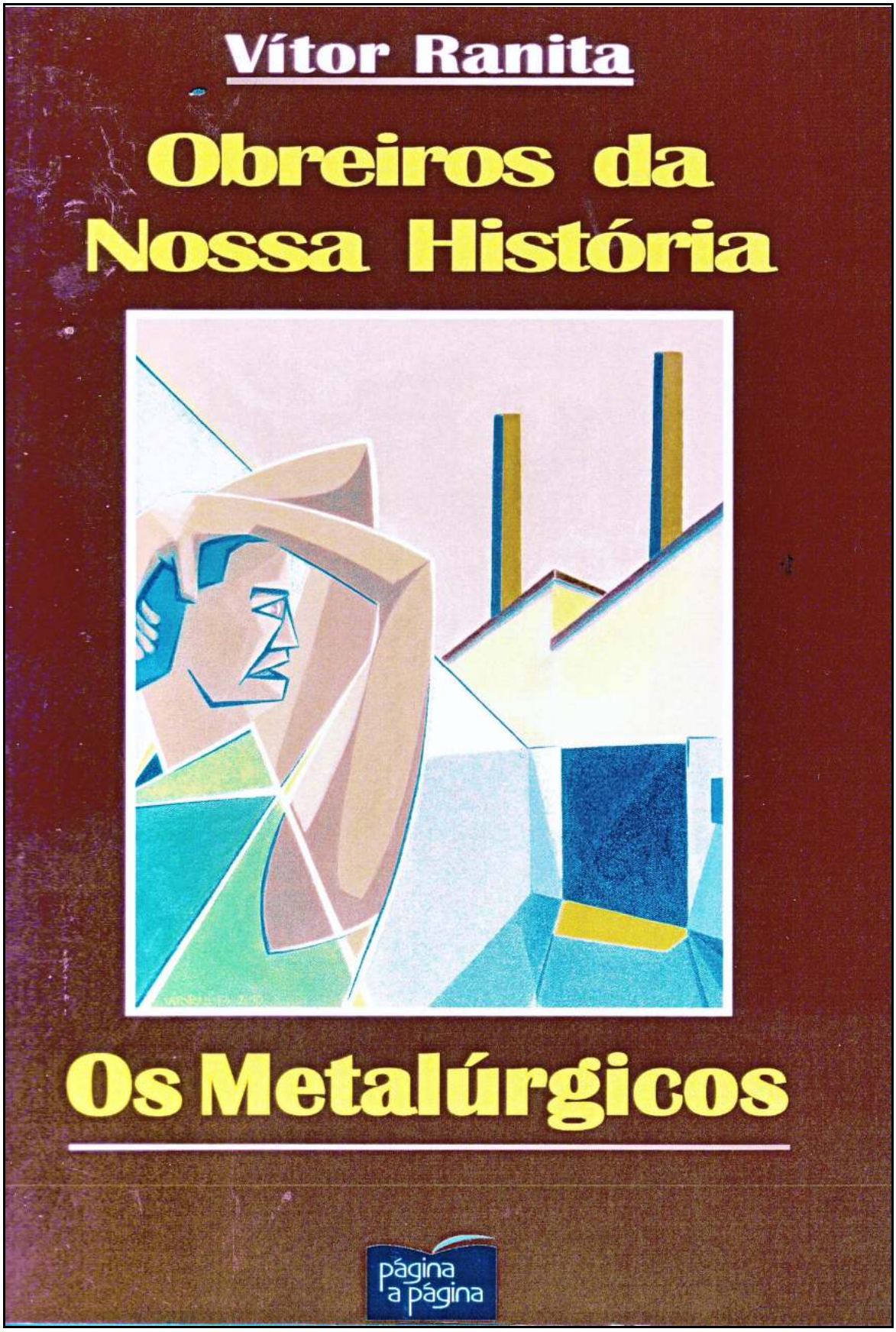
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