

Portugal in the European Context, vol. III

Welfare and Everyday Life

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- vol. I: *Institutions and Politics*
(edited by José Manuel Leite Viegas, Helena Carreiras, and Andrés Malamud).
- vol. II: *Knowledge and Society*
(edited by António Firmino da Costa, Fernando Luís Machado, and Patrícia Ávila).
- vol. III: *Welfare and Everyday Life*
(edited by Maria das Dores Guerreiro, Anália Torres, and Luís Capucha).

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Contemporary Portuguese Society

Maria das Dores Guerreiro, Anália Torres,
and Luís Capucha (editors)

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Foreword

This volume is part of a trilogy organised by the Centre for Research and Studies in Sociology (CIES), at ISCTE – Lisbon University Institute. It presents a broad range of recent analyses of contemporary society, placing *Portugal in the European Context*.

The trilogy is made up of three volumes:

vol. I *Institutions and Politics*

(edited by José Manuel Leite Viegas, Helena Carreiras, and Andrés Malamud);

vol. II *Knowledge and Society*

(edited by António Firmino da Costa, Fernando Luís Machado, and Patrícia Ávila);

vol. III *Welfare and Everyday Life*

(edited by Maria da Dores Guerreiro, Anália Torres, and Luís Capucha).

The aim of the publication is to share with the public the findings of national and international studies carried out by CIES researchers in recent years. Bringing the studies together within this trilogy required a re-examination of data and analyses, the end result of which has been to promote a better understanding of present day society.

These advances in understanding contemporary social life are structured around three thematic perspectives. Each volume underlines one of such perspectives.

Introduction

Maria das Dores Guerreiro, Anália Cardoso Torres, and Luís Capucha

The way in which the everyday life of populations is associated to more or to less quality of life has been a recurrent topic for social and political concerns and it has been the focus of varied analyses within the scope of different disciplines including sociology. Indeed, many sociological studies have sought to understand everyday life and lifestyles in the different societal contexts and how access is obtained in these contexts to a set of symbolic, collective and individual resources and materials that tend to give rise to a certain standard of quality of life, notably in accordance with the prevailing welfare system in each society.

Quality of life is a polysemous concept that integrates a range of dimensions referring to the conditions for satisfying basic needs as well as to a set of less tangible aspects linked to individuals' integration in networks of relations and belonging that give them a sense of identity. In fact, in the framework of the contemporary societies of advanced modernity neither material nor symbolic resources can be disregarded to guarantee that people have the conditions and opportunities necessary for their well-being; this increasingly raises the question of the (im)possibility of access to some and to others by broad segments of the population, and the discussion on the effective capacity of the welfare state to overcome the new social inequalities as they emerge.

Various authors have therefore reflected on what could be understood by a society with quality of life and propose several indicators for its definition: income levels, housing and working conditions, school and professional qualifications, health and access to personal care, social integration and civic participation, family relations and conciliation of work and family but also feelings of individual well-being and safety which express the evaluation people make of their lives and of the societies to which they belong. Turning to the contribution of Erik Allardt¹ whose approach on quality of life is again evoked, the concept includes three dimensions: "having" (material resources and living conditions), "loving" (affective and family relations) and "being"

(social integration, feelings of belonging, collective trust). It is his opinion that these are the ingredients that define quality of life in the day to day of individuals and societies.

This book comprises a selection of texts that are illustrative of the sociological analyses on some aspects of these issues. This third volume, entitled *Welfare and Everyday Life* completes the trilogy *Portugal in the European Context*, through which CIES seeks to disseminate the results of various lines of research conducted by its researchers. It includes analyses resulting from a broad range of projects focusing on the everyday lives of the populations, their lifestyles and living conditions; it encompasses a plurality of topics and perspectives that intersect institutions and social processes and provide a sociological overview of what characterises Portuguese society at this level. The various chapters of this volume contribute to the sociological reflection on these matters and questions in light of Portugal's situation in the current scenario of advanced modernity and the globalisation of societies and, in particular, its insertion in the European framework.

In chapter 1 "Changing families: configurations, values and recomposition processes", Maria das Dores Guerreiro, Anália Torres, and Cristina Lobo focus their analysis on the family, marriage and family recomposition. They start by drawing an overall picture of the changes that have taken place in the family. Using national and Eurostat statistics, data from the European Social Survey and also their own research conducted recently, they then: a) examine the evolution of the main Portuguese demographic indicators and, through them, the reconfiguration dynamics of family models, conjugality and the social role of women; b) make comparisons between indicators at the regional level; c) compare the family profiles in Portuguese society with those of the set of European Union countries and analyse the main trends regarding marriage, cohabitation and divorce; d) make a quantitative analysis of the phenomenon of remarriage in Portugal and identify the main dynamics of the family recomposition process that are associated to different social contexts and the previous conjugal trajectories of remarried men and women.

Chapter 2, "Do European values have a sex?", by Anália Torres and Rui Brites, shows that the behaviours, attitudes, opinions and values of men and women in Europe are much more similar to each other than one might expect. This paper uses the results of the European Social Survey and a transversal analysis focusing on the differences between the answers given by men and by women; it follows previous studies² in which this exercise was undertaken

2 Erik Allardt (1976), "Dimensions of welfare in a comparative Scandinavian study", *Acta Sociologica*, 19, pp. 227-239; (1993) "Having, loving, being: an alternative to the Swedish model of welfare research", in Marta Naussbaun and Amartya Sen (eds.) *The Quality of Life*, Oxford, Clarendon Press.

for all the answers to the ESS questionnaire and for about 43,000 respondents. In this text the authors make a more in-depth analysis of the answers that refer more directly to values and attitudes on important dimensions of personal life, social and political confidence: citizenship, political self-positioning and the regulation of the economic sphere; religion and human values. The text strives to demonstrate how an analysis of this kind can question established notions and stereotypes on gender differences.

In chapter 3, entitled “Work and family: what quality of life?”, Maria das Dores Guerreiro and Eduardo Alexandre Rodrigues analysis the levels and patterns of well being and quality of life of some professional segments of the Portuguese population, men and women with distinct socio-qualificational profiles. It uses the findings from a questionnaire survey conducted recently in Portugal in various private and public organisations in the service sector as part of the European project *Quality of Life in a Changing Europe*. On one hand, the text explores some factors for insertion at work that are associated to distinct levels of quality and satisfaction with them. On the other hand, indicators are constructed and used to assess how work interferes in the family and the satisfaction with work-family conciliation and with general levels of individual well-being.

Noémia Lopes and Felismina Mendes take us in chapter 4 to the “The changing everyday life of health”; they examine the dynamics that have been seen in the triangular relations between the field of medicine (increasingly dominated by experts in a process that is not unlike that found in other areas of social life), the lay know-how of people about illness, the body and means of recovery, and the means themselves, in this case exemplified by medication and by the use of genetics in the prevention and treatment of cancer. More far-reaching social transformations make health a “moral imperative”, a precious belonging in a society in which personal well-being is a core value, whilst the production of this well-being is becoming increasingly dependent on experts and the devaluation of old lay beliefs about sickness and healing as irrational beliefs. Yet this devalorisation is in some way inverted by the knowledge that lay people acquire through their growing contact with the experts, generating new behaviours of “autonomous” use of resources created by the development of medicine and science and illustrated in this article by self medication and by the prevention and treatment of genetically detected cancer.

In chapter 5, “Drug addicts: socio-psychological trajectories and problematic ties”, Anália Torres, Ana Marques Lito, Isabel Sousa and Diana Maciel, present the results of a study entitled “Drug addicts: trajectories,

2 Anália Torres and Rui Brites (2006), “Atitudes e valores do europeus: a perspectiva do género numa análise transversal”, in Jorge Vala and Anália Torres (eds.), *Contextos e Atitudes Sociais na Europa*, Lisbon, Imprensa de Ciências Sociais.

socio-psychological profiles, family patterns and mental processes” that seeks to answer some fundamental questions. Why do many young people experiment drugs without becoming dependent on them while others go from experimentation to addiction? Why are there some young people who use certain substance and yet refuse to experiment others? Why do members of the same family, siblings of the drug addict, or friends have divergent behaviour towards the consumption of drugs? Why is it that more men are drug addicts than women? In order to answer these questions, a research strategy was adopted that involves the use of different techniques at three distinct points in time: an extensive analysis of the CAT database in Restelo to identify social, family and individual irregularities as well as consumption patterns; a follow up aimed at identifying the changes in the individuals’ life trajectories following contact with the institution; and a final phase in which in-depth interviews are conducted with two distinct groups: one with individuals who have a history of drug addiction, and another with their siblings, close friends or partners who have not been addicted to drugs.

Chapter 6, by Luís Capucha, addresses “Poverty and social exclusion”. Using data from the European Household Panel, the main poverty indicators in Portugal are analysed from a dynamic dual perspective (data from 1995 to 2001 are systematically compared) and compared with the EU15 member states. The author starts with a presentation of indicators such as the monetary value of the at-risk-of-poverty threshold — leading to other indicators of the evolution of the quality of life — the risk of poverty before and after the social transfers, the persistent risk of poverty and measurements of unequal distribution of wealth. He goes on to analyse the main factors that affect the behaviour of these indicators such as the implementation of fiscal and social policies for income distribution, the dynamics of the labour market, family structures, the generation and gender of the people, categories and groups who are most vulnerable to the phenomena of poverty and social exclusion. The workers in low income industries and services, the “traditional” farmers, the long term unemployed, children and the elderly, pensioners and non-working population, large families and single-parent families, sectors of the population affected by specific problems such as drug addiction, immigrants in low quality segments of the labour market; these are some of the most vulnerable categories to poverty and they adapt to it by constructing diverse ways of life but they all suffer from exclusion from citizenship rights that crosses and negatively marks the development and Europeanisation process in Portugal.

In chapter 7, “Where is African immigration in Portugal going?”, Fernando Luís Machado, Maria Abranches, Ana Raquel Matias, and Sofia Leal analyse the settling processes, the paths and the generational transitions of the African population that immigrated to Portugal and use this information as indicators to assess their integration in Portuguese society.

Using official statistical sources and, in particular, data treated in the framework of various research projects conducted by other authors, they conclude that in recent years African immigrants have been progressively settling in the country; evidence is found of this not only due to the direction and flow of entry into and exit from Portugal, but also from the regrouping of families, the awarding of Portuguese citizenship to an increasing number of people and the number of mixed marriages. The authors then discuss how this settling will affect the social integration of these immigrants in terms of professional, school and residential trajectories; it is found that the integration of this population remains limited, albeit greater in the second generation of immigrants.

In chapter 8, "Immigration and education: trajectories, daily life and aspirations" Teresa Seabra and Sandra Mateus cross the two subjects that have become central to the political, social and scientific agenda in Portugal today. The authors start with an overview of the integration policies for pupils from immigrant families with regard a number of aspects: specificities of the right to education, including the questions of learning the language, the systems of equivalence, guidance and support measures, the segregation in micro-processes of teaching-learning and conclude that many of these policies are recent and there is a lack of data about them. They move on to make an in-depth analysis of issues such as the presence of the offspring of immigrants and the respective results, trajectories and behaviours. In contrast to certain common sense beliefs, they conclude on one hand that the condition of the children of immigrants varies greatly in accordance with the country of origin and on the other that everything indicates that factors such as gender, social class and the cultural capital of the origin of family have a more relevant effect than the geographical origin on the results, trajectories and behaviours of the offspring of immigrants in school. These are also determinant factors for the school investment and expectations that immigrant families place in the school success of their offspring.

In chapter 9, "Transitions in youth", Maria das Dores Guerreiro, Pedro Abrantes and Inês Pereira address an issue that has been the focus of a plethora of sociological research: the young generations. The text reflects on how people live out their youth in contemporary Portugal, based not only on contributions from various national and international research projects in which the authors participated, but also on other studies made in this area. The authors begin by discussing the concept of youth in its various shapes, covering some of the main analytical dimensions that structure the research undertaken on the transition processes to adult life. The multidimensionality and the variability of these processes that result from the structural conditions and individual provisions are explored here in the current context of advanced modernity, of demands and uncertainties in which universes of opportunities and fields of exclusion coexist but which is the scenario in which young people plan out their future.

Chapter 10, “Life patterns in contemporary society”, by Susana da Cruz Martins, Rosário Mauritti, and António Firmino da Costa, presents a comprehensive panorama of the lifestyles of the Portuguese population in the overall context of contemporary society. Based on theoretical conceptualisation and long lasting empirical research, the authors strive to use this concept of life style to articulate analytical dimensions referring to “work”, “consumption” and “qualifications” overcoming difficulties that had not been fully resolved in previous analyses. A set of indicators is combined that can be reported to these dimensions by means of multivariate analyses; a typology of life styles is identified; these life styles are projected in social space, measured and geographically mapped; lastly the standards of living and levels of inequality in Portugal are compared with those in the other European Union countries.

It is hoped that the contents of these ten chapters will provide the reader with a greater understanding of the process and social dynamics that characterise the day to day and the quality of life of the populations in Portugal and in the European context.

Changing families

Configurations, values and recomposition processes

Maria das Dores Guerreiro, Anália Torres, and Cristina Lobo

It is generally agreed that the family is not what it used to be. But there is nothing new about this statement as the same must have been said a century ago by the people studying family relationships and trying to understand society in those days. Specifically, in Durkheim's work, references are found to the family changes that took place in societies' transition from the old regime to modernity; equally, his predecessor Auguste Comte was concerned about the "weakening" of the family institution and the consequences this would have on the social order. Theorists of contemporary society continued to emphasise the changes in the family as one of the most significant aspects of the so-called second modernity. Although addressing different kinds of change, perhaps the allusion made by authors in works separated by over a century have something in common. Both Durkheim, on one hand, and Beck and Beck-Gernsheim (2001), on the other, note the importance of individualisation as a vector by which many of the changes in family life pass. Indeed, in the "first" modernity, Durkheim (1975 [1892]) emphasised the emergence of the conjugal family and the independence of the individuals therein in relation to the networks of relatives. Theories of late modernity stress individual autonomy and reflexivity as aspects that give social agents the capacity to act, take risks and innovate, in accordance with more ephemeral affective relationships that punctuate erratic biographies. New ways of life take on greater significance than the more enduring family. These "pure relationships" are not so long lasting and focus on individual well-being. Here the democratisation of gender relations and women emancipation must be stressed (Giddens, 1991; Beck and Beck-Gernsheim, 2001).

On analysing the trends in the changes that have been occurring in the family in western societies over the 20th century and up to the present day, focus can be given to the reconfiguration process of the family shape and the ways of organising day to day life; equally, however, the emphasis can be placed on the dynamics inherent to the normative frameworks, to the new

meanings of family and the different conceptions about how affection that does not involve heterosexual marriage or procreation can be experienced.

A number of authors have stressed privatisation and the closure of families (Sennett, 1988; Shorter, 1975; Lasch, 1977) and the autonomisation of the nuclear family from the broader groups of relatives, around which the economic support and the protection of its members had been structured in pre-industrial societies. With the emergence of industrialisation and paid work, the family's relationship with the economic activity changed. Compared to the traditional model, the modern nuclear family has lost productive and educational functions, the latter being shared with the school, and acquired new functions at the affective-emotional level and in terms of the development of the child's personality (Parsons, 1955; 1971). Changes have also taken place in values and these have an impact on the individualisation process. The family has become the key location for personal achievement and identity construction, the private sphere that shields individuals from the public, formal and impersonal space and gives them freedom of choice in contrast to the constraints of the community and the pre-industrial extended family.

Since the mid 1970s, studies have identified changes in intimacy (Giddens, 2001), new conjugalities (Kauffmann, 1993; Singly, 1991; Torres, 1996; Aboim, 2006), procreative strategies leading to a considerable drop in the birth rate and linked to the new significance of children (Almeida, 2004; Cunha, 2007), more democratised relationships between the various family members, different representations of the gender roles, now understood as more egalitarian. Greater visibility is given to homosexual unions (Almeida, 2006; Silva, 2006), single parenthood and the family recomposition processes (Lobo, 2007) as a result of continued marital break-ups, current articulations between family and work, with a massive presence of working women, and changes in the way family life is managed (Guerreiro and Ávila, 1998; Torres, 2004; Wall and Guerreiro, 2005).

In all these research dimensions, and particularly with regard to women's situation, there are clear signs, where western societies are concerned, of family realities significantly different from those of late 19th century and mid 20th century families. In some cases, these changes tend to be applauded and regarded as necessary in ending the allegedly harmful effects of certain kinds of family relations, namely those linked to women's subordination to patriarchal dominance. Others tend to emphasise the less positive effects that can arise for the individual and society from the supposed decline or weakening of the family (Berger and Berger, 1983).

Nevertheless, apart from the positive or negative signs given to the interpretation of changes, what we see is that there is still a certain family shape behind the agency and reflexivity of the individuals, whether it has a more orthodox or more innovative configuration. The individual's capacity to confront and manage risk is often a result of the emotional and material support provided by those who are considered to be part of the family, of the social and

affective competencies that the families transmit to their members through socialisation. In fact, these families in their multiple forms are still the source and the cement of moral values for the individuals that were born into them and who form them (Amato and Booth, 1997; Levy, Widmer and Kellerhals, 2002). As Segalen (1993) or Saraceno and Naldini (2003) among many others noted, although the discourse on the declining importance of the family has continued throughout the ages, the family institution in the diversity of models and significances in the different periods of history, has proved to be strong and able enough to adapt to social, economic and cultural changes: it is even considered an active participant in societies' modernisation and transformation processes, although some viewpoints underline the exogenous nature of the changes in family systems (Therborn, 2004).

These comparative analyses tend to be made about western societies and a set of countries that are considered industrialised and structurally distinct from the so-called third world countries. Although the history of the Europe endows it with some specificities, the family in western European and North American society can show a number of similarities resulting from industrialisation, urbanisation and secularisation, which are essential parameters when making comparisons with other regions of the world such as Africa or Asia in terms of a number of demographic and socio-familial variables (Qvortrup, 1989). On the other hand, studies by French (Ladurie, 2000 [1975]) and Anglo Saxon (Laslett and Wall, 1972) historians demonstrated that the nuclear family had preceded modernisation in western Europe and was relatively widespread there as a result of the principle of neo-local marriage. In contrast, the extended family used to be a family form found more in Eastern Europe where the patriarchy was stronger (Berger and Berger, 1983; Therborn, 2004). Safeguarding the internal heterogeneities of each country, over the centuries families in Northern and Central Europe have not only presented distinct characteristics from the families of other societies and cultures such as those of the African and Asian continents or the Islamic world, but they have also distanced themselves significantly from the family models of Southern and Eastern Europe (Goldthorpe, 1987; Therborn, 2004).

Recent decades have witnessed the integration of the Southern European countries in the European political space and, more recently, some of the Eastern European countries so that distinct family traditions now coexist. To what extent do the family differences remain or tend to fade, especially in countries that have now been members for some decades? Have European policies also helped to unifying practices and making configurations similar in the scope of the private sphere? Family models have been going through a long term standardisation process. On the other hand, the alternative lifestyles and the family arrangements that the individuals establish in order to meet their needs and expectations stand out in short term analyses; this leads to more diverse family structures. Furthermore, the paths of daily life and the

transitions that occur in them are becoming less and less sequential and in quite irregular temporal spaces. How does this reflect on the kinds of family in each country? Can patterns be identified in which the lines are associated to different societal profiles? How do the welfare state policies interfere in these processes?

This chapter analyses family configurations in Portuguese society and compares them to the other European Union countries. We first characterise family structures and the main demographic and social indicators from INE (Statistics Portugal) and Eurostat data. For the sake of comparison, we give indications for an understanding of certain specificities in Portugal. This is followed by a comparative analysis of the values inherent to families of different nationalities, based on data from the *European Social Survey*. We also use these data to analyse in more detail trends in conjugality — marriage, cohabitation and divorce in Europe. Lastly, an analysis is made, albeit brief, of the demographic phenomenon of remarriage in the Portuguese society between 2001 and 2005 and a structured set of sociographic characteristics of its protagonists is identified. In addition, the most significant conclusions of a qualitative study on the key moments of transition within a family recomposition process are briefly summarised.

Demographic changes in Europe: specificities of the Portuguese case

When the most recent demographic indicators for Portugal are compared with those of several decades ago, it is found that significant social changes have taken place contributing to the reshaping of lifestyles and family models. While there was a trend towards the standardisation of the characteristic patterns of modernity until the mid 20th century, thereafter the trends inverted and there was a drastic reduction in the marriage (civil and Catholic) and birth rates at the same time as a rise in the divorce rate and the percentage of children born out of wedlock. Men and women are getting closer in age and also older when they officially enter into marriage than in previous decades and the average age of women when they give birth for the first (and for many only) time is over 28 years. The size of the family household is getting smaller, as is the proportion of complex families. On the other hand, households with just one person are on the rise and though these are formed mainly by the elderly, the younger generations are gradually assuming larger proportions. A comparison of the 1991 and 2001 Census figures reveals an exponential growth of young people living alone, even though the figure is only in the region of 3% (Guerreiro, 2003; Wall and Aboim, 2003). There are therefore indications that the family dynamics of Portuguese society are drawing closer to the processes of advanced modernity although some regional differences and continuities can be identified which suggests the overlapping of modern and

more traditional features. For example, despite the decline in the rate of Catholic marriages in the country as a whole, it continues to be much higher in the North of Portugal while lower figures are found for religious marriages in the South and autonomous regions.¹ More traditional values and stronger religious beliefs appear to persist in the north and the centre which is reflected in the fact that this is also where the divorce rate, the proportion of children born outside of marriage and civil unions are lowest.

Another key to the understanding of family behaviours involves the growing participation of women in the labour market, notably when their children are still young. Indeed, the female activity rate keeps on increasing and in certain age groups is getting very close to that of male activity rates. Given the rise in their education levels over the last four decades, women have acquired qualifications and embarked on careers. The impact of their occupational participation on the growth of the working population is notable, despite the strong vertical and horizontal gender segregation still found in the labour market (Ferreira, 1993; Guerreiro, 2000; Torres, 2004).

Turning now to the European context, a comparative reading of the family and employment indicators show equivalent trends in the various countries towards a delay in certain phases of people's trajectories and, hence, the timing of the transitions leading to the formation of new families. Schooling tends to be prolonged and insertion into the labour market is more syncopated and reversible, as are the processes of independence of young generations from their parents, the structuring of life as a couple and entry into parenthood (Guerreiro, Abrantes and Pereira, 2004). The effect of this and of other frameworks of values, meanings, orientations and constraints on family and marital life is that young people continue to live with their parents until later, the average age of marriage and of women having their first child is rising, and there is a sharp fall in the birth rates and a steady growth in the number of working women. On the other hand, there is an increasing dissociation between procreation and formal marriage and the number of children born from informal relationships is growing. Official marriages have generally declined and the proportion of civil unions has grown significantly. The amount of single parent families continues to be moderate as the increase in separations is associated to remarriage and recomposition of families. Couples with and without children, with fluctuating figures, constitute the most representative type of family in almost all European countries.

While this is the overall scenario, there are still differences between countries that underline specific profiles on the socio-demographic family map of Europe. Table 1.3 shows that demographic and family patterns in Northern Europe stand out as being quite distinct from those of Southern and

1 An analysis of these figures is found in Lalanda (2002).

Table 1.1 Evolution of the family and occupational activity indicator

	1960	1991	2001	2006
Average age on 1st marriage				
Women	24.8	24.2	26.1	27.5
Men	26.9	26.2	27.8	29.1
Average age on birth of 1st child				
Women	25.0	24.9	26.8	28.1
Marriage rate (1)	7.8	7.3	5.7	4.5
% Catholic marriages	90.7	72.0	62.5	52.1
Divorce rate (2)	0.1	1.1	1.8	2.2
Birth rate (3)	24.1	11.8	11.0	10.0
Synthetic fertility index (4)	3.2	1.6	1.4	1.3
Births out of wedlock (5)	9.5	15.6	23.8	31.6
Average household sizes (6)	3.8	3.1	2.8	–
Living alone *	11.5	12.4	15.5	–
Young people living alone (15-29 years)**	–	1.4	3.2	–
Complex households (6)	15.4	13.9	10.4	–
Female activity rates				
Overall	13.0	35.5	45.5	47.7
25-29 years	19.8	74.1	85.0	85.4
30-34 years	16.6	72.3	83.3	88.3
35-39 years	15.3	69.0	79.9	87.0

Notes: (1) marriages x 1000/average pop.; (2) divorces x 1000/average pop.; (3) births x 1000/average pop.; (4) number of children per woman in fertile age 15/49 years; (5) total of liveborns outside of marriage per 100 liveborns; (6) the criteria for the definition of this kind of family can be found in Almeida et al. (1998: 49).

Source: Almeida et al. (1998); Almeida et al. (2007); INE, Social indicators 2006; INE, Employment Survey, 2006; *Wall and Aboim (2003); **Guerreiro (2003).

Table 1.2 Demographic indicators by region

NUT II	Catholic marriages	Cohabitations*	Gross marriage rate	Gross divorce rate	Gross birth rate	Synthetic fertility rate	Live births out of wedlock
Portugal	52.1	3.7	4.5	2.2	10.0	1.36	31.6
Mainland	53.3	3.7	4.5	2.2	9.9	1.36	31.9
North	63.3	2.1	4.9	2.0	9.6	1.26	21.9
Centre	56.4	2.8	4.3	1.9	8.7	1.24	26.7
Lisbon and Tagus Valley	39.0**	6.1	4.2	2.5	11.4 ***	1.55	42.9 **
Alentejo	57.3 ***	–	–	–	8.4 ***		27.0 ***
Alentejo	47.3	4.7	3.6	1.9	8.4	1.30	37.6
Algarve	33.8	7.3	4.0	2.4	11.5	1.70	48.7
Azores A.R.	25.9	1.9	6.0	2.4	11.6	1.48	22.6
A.R.	42.6	2.3	5.4	2.3	11.9	1.46	29.6

* Individuals declaring that they have a civil union in the 2001 Census, in Almeida et al., 2007;

**Lisbon;

*** Médio Tejo (Mid Tagus).

Source: INE, Social indicators, 2006.

Table 1.3 Family and employment indicators in Europe

Countries	Non- -related people household	Living alone	Childless couples	Couples with children	Parent with children	Complex, extended and multiple families	30-34 year-people living in parents' home	Cohabitation	Marriage rate	Divorce rate	Fertility index	Gross birth rate	Female employ- ment rate
Total (average)	–	–	–	–	–	–	13.4	–	4.88**	2.0**	–	10.57*	58.3*
Belgium	–	–	–	–	–	–	10.0	–	–	2.9	–	11.50	55.3
Czech Rep.	2.0	30.3	18.5	32.1	12.1	5.1	11.3	2.7	5.15	3.1	1.33	11.30	57.3
Denmark	3.4	36.8	26.8	20.6	4.5	7.8	–	11.5	6.70	2.8	1.83	11.95	73.2
Germany	1.0	35.8	28.0	24.7	5.5	4.9	6.8	5.5	4.54	2.4	1.32	8.16	64.0
Estonia	3.1	33.5	16.6	23.7	11.7	11.4	10.0	7.6	5.18	3.0	1.55	11.07	65.9
Greece	3.9	19.7	18.1	31.7	6.8	19.7	21.3	1.3	5.18	1.2	1.39	10.05	47.9
Spain	4.0	20.3	15.3	32.8	6.3	21.3	22.7	2.2	4.80	1.7	1.38	10.94	54.7
France	2.0	31.0	24.3	29.6	7.0	6.1	7.2	–	4.34	2.5	2.00	13.13	60.0
Ireland	7.1	21.6	16.4	36.6	10.1	8.2	15.6	4.8	5.13***	0.8	1.93	15.07	60.6
Italy	2.5	24.9	19.4	37.8	8.1	7.3	26.1	2.2	4.13	0.8	1.32	9.50	46.6
Cyprus	2.1	16.0	19.4	39.6	4.7	18.2	10.7	1.0	6.80	2.0	1.47	11.30	62.4
Latvia	3.4	25.0	15.5	30.1	20.3	5.8	21.4	–	6.39	2.8	1.35	9.73	64.4
Lithuania	0.4	28.7	14.9	17.3	3.5	35.3	–	2.4	6.26	3.3	1.31	9.21	62.2
Luxembourg	–	–	–	–	–	–	9.9	–	4.12	2.3	1.65	11.66	56.1
Hungary	2.9	26.2	20.7	29.3	9.2	11.6	13.5	5.3	4.42	2.5	1.34	9.91	50.9
Netherlands	0.7	33.6	29.1	29.2	5.6	1.9	4.8	9.7	4.35	2.0	1.70	11.32	69.6
Austria	2.2	33.5	20.4	27.5	8.8	7.6	10.4	5.8	4.46	2.4	1.40	9.40	64.4
Poland	1.6	24.8	14.2	35.6	11.0	12.7	16.1	1.3	5.93	1.8	1.27	9.81	50.6
Portugal	1.9	17.3	21.8	39.3	7.0	12.7	15.1	4.0	4.52	2.2	1.35	9.96	61.9
Slovenia	1.9	21.9	13.9	36.6	10.2	15.5	22.6	4.7	3.17	1.3	1.31	9.43	62.6
Slovakia	1.7	19.4	14.9	8.8	3.6	51.7	14.5	0.6	4.81	2.1	1.24	9.99	53.0
Finland	2.5	37.3	23.7	23.2	7.3	6.0	5.9	9.7	5.36	2.6	1.84	11.17	68.5
United Kingdom	–	–	–	–	–	–	7.9	–	5.23***	2.2	1.84	12.34	65.5
Romania	1.8	18.9	19.1	31.5	7.7	21.0	12.0	3.0	6.79	1.5	1.31	10.16	52.8
Bulgaria	–	–	–	–	–	–	11.7	–	4.26	1.9	1.37	9.60	57.6
Liechtenstein	1.9	32.5	21.4	32.3	6.3	5.5	8.4	4.1	4.31	2.3	1.42	10.30	–
Norway	1.1	37.7	20.6	28.8	8.0	3.8	6.0	9.5	4.66	2.3	1.90	12.56	74.0
Sweden	–	–	–	–	–	–	–	–	–	–	–	–	71.8
Switzerland	2.0	36.0	25.8	27.0	4.8	3.7	4.8	5.8	5.32	2.8	1.43	9.80	71.6

Source: Eurostat, Census 2001; INE, Demographic Statistics, 2006; Employment Survey, 2006; *Europe 27 countries; ** EU27, 2005; ***2005.

Eastern European countries, while an intermediate situation is found in the countries of Central Europe, albeit closer to Northern Europe in some cases.

People living alone, mainly the elderly but with young people assuming greater proportions, also have a strong expression in Nordic countries. This is where fewest couples with children are found and it is usual for offspring to become autonomous from their family of origin when they reach adulthood. This is why there are fewer adult offspring living with their parents in these countries. There are higher rates of cohabitation, marriage (in some countries, e.g. Denmark and Finland) and fertility, which mean that the predisposition and conditions of independence for moving into adult life and parenthood in these countries. The Nordic countries have the highest rates of female employment, well above the 60% target of the Lisbon Strategy, in addition to a much broader coverage of care facilities for children and dependents, on one hand, and shared parental leave on the other.

The opposite scenario is found in families in Southern and Eastern Europe where people living alone are predominantly the elderly. Fewer young people live alone and more live with their parents. A significant percentage of people over the age of 30 are still living in the home of their family of origin. This trend is found in Portugal, though the figures are not so high as for Spain, Italy and Greece, or Slovenia and Latvia. Hungary and Slovakia, Poland and Ireland are similar to Portugal. The number of young people living away from their families of origin grows from South and East to the North.

In turn, complex families tend to expand from North to South and East where the largest proportion of complex families are found in countries like Lithuania and Slovakia (over 22%). Along with possible cultural factors that may be used to explain more numerous family households, economic and housing problems could be at the root of this family complexity. Fertility rates are lower in the countries of the South and East and the figures for cohabitation are also modest.

However, some behaviours in Portugal diverge from the countries of the south, such as the higher levels of working women. Various factors combine to explain the specificity of Portugal which has been manifesting itself since the 1970s. Not only are the population's socio-economic conditions and the low salaries of men important but consideration must also be given to the colonial war (1961-1974), the emigration processes and the fact that after there was a period when equal rights were strongly defended in the policies following the 1974 Revolution.

In the more disadvantaged social sectors, one of the indirect effects of the emigration phenomenon was a certain female protagonism. The women who remained were obliged to make decisions alone, they came up against new situations, assumed positions, organised and managed family life and they experienced some freedom. Those who left with their husbands came across new realities. The albeit forced development of women's protagonism

and the knowledge of other worlds contributed to a new reality and a new image of women's skills outside of the home; this has been demonstrated in a number of qualitative studies in which professional work appears as an important means of personal affirmation (Torres, 2004; Monteiro, 2005).

In other more educated social sectors, the thirteen years of the colonial war brought some changes. The burst of relative economic growth at the end of the 1950s had created work posts for middle and senior managers, but the civil war and mandatory military service delayed the entry of young men in working life by four years, and sometimes meant leaving the country or other changes. On the other hand, the potential husbands of young women studying at university students and those with secondary school education could marry either when they had finished their studies and then go to war, or when already in the war with or without their studies completed. The market gave these women compatible job opportunities — civil service, teaching, companies. The wait for the men to return home seemed far too long and the women had the opportunity not only to occupy their time but to earn some money. These opportunities were seized with both hands. Once they had entered the labour market, few of them left. In these social sectors, the compatibility of family and working life was eased at the time by an abundant supply of cheap domestic help.² This was soon followed by the 25th April Revolution which reinforced this protagonism as people at this time were open to the ideas of equality between men and women and obsolete and patriarchal laws were reformed. The specific history of this generation of working and more educated women³ had a number of consequences.

The conclusions of various studies suggest the transmission from one generation to another had a significant effect on behaviours, and show that the entry of daughters into the labour market was undoubtedly affected by the working lives of their mothers. There were specific socialisation effects and the higher the mother's level of schooling the greater these effects were.⁴

2 In the 1960s the decline in agriculture and migratory movements of the population abroad and to the big cities led to a large rise in the unskilled female work force that had been employed in domestic service.

3 The women in this group are probably the explanation for the very high number of women in relation to men who completed their PhD in the 1980s in Portugal in areas where men tend to predominate in other countries such as mathematics (49%), physics (44%), chemistry (63%) and biology 61%. Portugal also has a higher percentage of female full professors than other countries: the figures for this category in 2001 are 14% in France, 12% in Italy, 10% in the United Kingdom, 10% in Germany, and 19% in Portugal. Nevertheless, it should be noted that there is still a gap between men and women in Portugal, just as in other countries and men are much more strongly represented in management and/or highly qualified positions in university and scientific institutions (Amâncio, 2003: 189, 191).

4 Authors such as Louis André Vallet, Claude Thélot, and François de Singly, cited by Martine Segalen (1993: 194), considered that professionalisation models are hereditary. According to Vallet, the daughters' futures depend more on the mother's position than

From this perspective, the participation of the young women with secondary and university education in the 1960s and 1970s could in part explain the high levels of young Portuguese women currently found in higher education, some of them being their daughters (Guerreiro and Romão, 1995), even in traditionally male sectors.⁵ It also partly explains their propensity for wishing to balance their working and family lives.⁶

Returning to the overall data, some deep-seated trends should now be highlighted. In short, families in North Europe are smaller and this is where more young people live alone, there are fewer couples with children and fewer young adults living in their parent's home. These indicators all reveal a greater affirmation of autonomy.

In the enlargement countries and in the south, families tend to be slightly bigger, there are fewer people living alone, most of whom are elderly. These countries are also characterised by having more respondents living with their parents, particularly in the case of young adults. Differences in Europe therefore remain just as Roussel (1992) and Therborn (2004) have already shown us. But the range of these differences has been diminishing over recent years and there are therefore signs of convergence. This can be seen more clearly below.

Family, friends, leisure and work: key commitments in the life of Europeans

The great transformation processes in the family witnessed throughout Europe under analysis are sometimes accompanied by reactions that tend to interpret these changes as meaning Europeans are becoming less interested in family life. However, the systematic analysis of the surveys focusing on these issues leads us to other conclusions.

The *European Social Survey* data provide an overall picture of the dimensions of life which Europeans make a priority. This picture, shown in figure 1.1, answers the two questions that refer directly to transformations in the family domain. Firstly, do social processes, e.g. greater autonomy of the members of

the father's, i.e. when daughters are more likely to work if their mothers do so. Similarly, Thélot and Singly show that the higher the level of the mother's schooling, the more likely it is that her offspring will attain a better position in the profession.

5 Still on participation in university life, it is worth stressing that at the start of the 1990s Portuguese women were more represented in the so called traditionally male courses. In the 1992/93 academic year, 28% of the students in Engineering and Architecture were women (European average: 18%), 61% in Natural Sciences (European average: 44%) and 45% in Mathematics (European average: 28%) (Torres, 2002).

6 In a survey of young people in the Loures municipality, nearly 90% of women defend total symmetry between men and women with regard both professional performance and the sharing of household chores (Torres, 1996b).

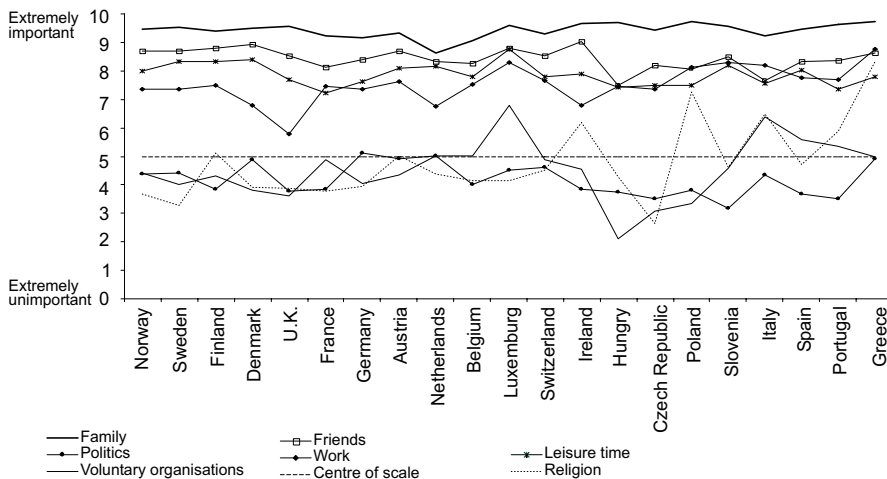


Figure 1.1 Importance of each aspect in life (average)

Importance attributed to family	Variance: $F=64,764$; $p=0.000$; $Eta^2=0.035$
Importance attributed to friends	Variance: $F=60,408$; $p=0.000$; $Eta^2=0.033$
Importance attributed to free time	Variance: $F=35,43$; $p=0.000$; $Eta^2=0.020$
Importance attributed to politics	Variance: $F= 87,289$; $p=0.000$; $Eta^2=0.047$
Importance attributed to work	Variance: $F= 136,920$; $p=0.000$; $Eta^2=0.072$
Importance attributed to religion	Variance: $F= 336,823$; $p=0.000$; $Eta^2=0.159$
Importance of volunteer organization	Variance: $F= 245,970$; $p=0.000$; $Eta^2=0.122$

Source: *European Social Survey*, 2002; Torres, Mendes, and Lapa (2006).

the couple and individualisation of the living possibilities, mean a break in the importance of the family in relation to other spheres of life? Secondly, do European countries differ from each other according to the arrangements between the principles of autonomy and the organisation of life together? Figure 1.1 allows us to answer these two questions with a resounding “no”.

As for the first question, the affective dimensions (family, friends) in fact appear in key positions whereas religion and politics are generally at the bottom of the hierarchy. It is also found that family value is autonomous from the others and is not linked for example to religion. With regard to the second question, family is not more important in some European countries than in others. It is a value held by all the ESS countries and the figures for the importance of the family in Scandinavian countries are very similar to those of Spain and higher than those of Italy.

The family is not therefore in crisis. On the contrary, it is the main sphere of personal investment. It is the family models and representations and the ways of investing in the family that seem to have changed. Phenomena such as low fertility, together with divorce and cohabitation becoming trivial and acceptable should not be understood however as symptoms of the decline of the family, but as symptoms of new investments and meanings given to it, e.g.

doing away with the idea that the family is essentially defined by the formal tie. The construction of the family is maintained as the most important dimension in the lives of Europeans with the affirmation of autonomy and the devalorisation of the institutional component of marriage, as well as the rigid differentiation of the gender roles. The family is now defined as a place where the affirmation and maintenance of individual freedom is sought and a space for complete affective fulfilment.

Despite the priorities people give to family and work as spheres of life that can reflect differences of personality and socialisation, living or cultural experiences (Prince-Gibson and Schwartz, 1998), it is found that both men and women have very similar priorities in relation to the family and work. Both evaluate the family as the most important dimension of their lives (with figures over 9 on a 0 to 10 scale), while work is put in third or fourth place, as we saw above, but with very similar figures for both sexes. The existence of greater intra-sex than inter-sex differences is in line with the conclusions of other studies conducted in the scope of gender sociology: there is less diversity between the sexes than between the group of women or the group of men (Amâncio, 1994; Kimmel, 2000; Connell, 2002; Torres and Brites, 2006); this is illustrated more fully in another chapter of this volume.

It is worth looking now in more detail at the changes in conjugality and at their different forms as this is one of the dimensions of family life which has seen significant transformations in Europe and specifically in Portugal particularly in recent years.

Marriage: the main form of conjugal life throughout Europe

Taking the picture of Europe with regard marital status along with cohabitation, it is interesting to discuss social factors and processes that might explain the patterns found.

What stands out from table 1.4 is that we still live in the “Europe of the married couples”, as this is undoubtedly the predominant civil status in almost all the countries. Sweden is the only country with less than 50% of married people even though this is still the modal group. Some differences can in fact be seen between the countries.

Scandinavian countries have the smallest number of married people in Europe. The percentages for the countries in the south are around 60%.

The figures for cohabitation show that Scandinavian countries have more informal relations (more than 30% cohabit) along with some Northern and Central European countries (over 20% in United Kingdom, Germany, Austria and Switzerland). In contrast, southern countries have the lowest figures in Europe; Italy, where less than 8% of the population cohabit, has the highest figure in this group. Greece is the country where fewest people cohabit (3%), followed by Portugal (4%).

Table 1.4 Marital status and cohabitation (%)

	Married	Separated	Divorced	Widowed	Single	Cohabiting
Norway	51.3	1.2	7.2	7.1	33.2	36.9
Sweden	46.1	0.8	8.9	5.4	38.8	36.9
Finland	50.2	0.7	9.3	6.4	33.4	24.5
Denmark	55.0	0.8	7.6	5.7	30.9	35.5
United Kingdom	55.7	2.4	7.1	6.9	27.9	21.8
France	58.3	1.3	5.7	5.7	29.0	28.6
Germany	56.2	1.9	7.5	8.2	26.2	20.9
Austria	58.4	1.1	6.4	5.8	28.3	24.4
Netherlands	63.2	0.4	4.9	5.9	25.6	—
Belgium	53.5	2.5	8.2	6.4	29.4	19.1
Luxembourg	54.4	1.4	4.7	5.3	34.2	15.6
Switzerland	58.9	1.5	7.4	4.3	27.9	22.1
Ireland	55.3	3.3	1.1	7.4	32.9	8.0
Hungary	55.3	0.8	8.5	12.3	23.1	15.1
Czech Rep.	64.4	1.8	8.3	10.6	14.9	13.3
Poland	57.6	0.5	3.2	9.8	28.9	3.6
Slovenia	53.9	0.7	3.7	9.0	32.7	14.4
Italy	60.5	2.2	1.8	6.7	28.8	7.6
Spain	58.5	1.7	1.2	7.5	31.1	4.9
Portugal	64.8	0.7	2.2	7.5	24.8	4.0
Greece	66.6	0.6	1.6	7.6	23.6	3.0
Average	57.8	1.6	5.2	7.4	28.0	20.4

Source: *European Social Survey*, 2002; Torres, Mendes, and Lapa, 2006.

Figure 1.2 shows that the percentages of married people rise, albeit only slightly, when we move from Scandinavia to the countries in the south of Europe. The line of cohabitations is particularly conspicuous as there is a dramatic drop between the Scandinavian countries and those in the south of Europe. The impression given by the direction of the evolution of the two lines is that the marriage numbers are correlated with the cohabitation numbers, though the correlation ($r=0.32$) suggests there are other pertinent factors in the explanation of the percentages of marriages and cohabitation in the different countries.

As for the younger generations, figure 1.3 presents an interesting inversion in the lines referring to marriage and cohabitation when we go from the Scandinavian and Nordic countries to the enlargement and southern countries. In fact, there is a significant correlation between the two situations for the youngest group ($r=0.55$). However, Figure 1.3 suggests a trend towards conjugalisation and, despite the high percentages for cohabitation among the young in certain countries, a large majority end up in marriage as can be seen from the above mentioned total figures for married people.

In the Scandinavian and northern and central Europe countries, cohabitation is therefore the most common trend and there is a clear separation between leaving the parents' home and marriage. In contrast, the percentages of young people cohabiting in countries in the south are the lowest in Europe

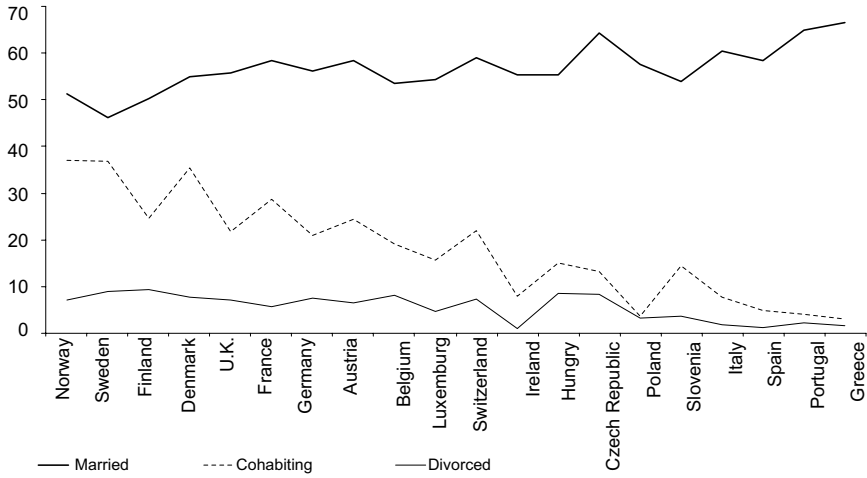


Figure 1.2 Married, divorced and living together (%)

Note: the data for the Netherlands were not included since they are not reliable with regard to the question on living with a partner (possible mixture of cohabitation and marriage).

Source: *European Social Survey, 2002*; Torres, Mendes, and Lapa (2006).

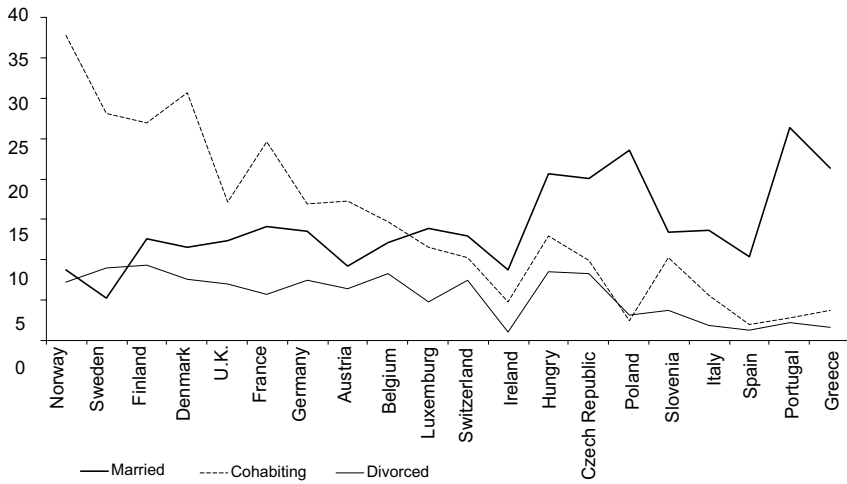


Figure 1.3 People aged 15 to 29 married or living together (%)

Source: *European Social Survey, 2002*; Torres, Mendes, and Lapa (2006).

from which it can therefore be surmised that conjugalisation and leaving the parents' home is essentially a result of marriage and starting a family.

The choice of marriage may, in part, indicate that people draw away from the less formalised and less legally protected cohabitation (Torres, 2002). On the other hand, cohabitation is not an option instead of or against marriage. As Kaufmann (1993) suggested, it is often a stage in the couples' selection process that is followed up by marriage when stability has been guaranteed and the decision is taken to have children or where there are already children as noted by Oinonen (2004). Equally, Bozon (1992: 445) shows for France that not only do the majority of those cohabiting end up getting married but they have a Catholic wedding. These cases do not reveal the "de-institutionalisation" of marriage as some propose but rather a delay and a more pragmatic attitude towards life choices and institutions (Torres, 2002: 67).

Spain and Italy differ here from Portugal as they have fewer young married adults but not because they establish informal relationships like the Scandinavians. These two countries have few young people who marry, cohabit and live alone because they remain in their parents' home as mentioned above and confirmed in other studies (Saraceno, Olagnero and Torrioni, 2005).

On analysing the figures for the percentages of divorcees (table 1.4 and figure 1.3), the most interesting factor to note and as already observed for single parent families, is that the figures are in fact low (average of 5.2%). This clearly reveals the transitory nature of these situations as previous studies on stepfamilies have shown (Lobo and Conceição, 2003). The comparison between countries takes us again to the already familiar pattern of differences between the Scandinavians, the north and centre and the south; the higher percentages of divorcees are found in the former countries and the southern countries are accompanied by Ireland and Poland.

It is worth observing figure 1.4 to confirm what has been said about the transitory situation of the divorcee as it compares the percentage of divorcees with the percentage of married respondents who have already been divorced. In most countries, the figures for those who have already been divorced are higher than those who were divorced at the time of the survey.

It is noted that in general the countries that have the highest divorce rates i.e. where it can be assumed that stepfamilies or the return to marriage are more established patterns, also have far more people who have already been divorced than those who are currently divorced.

In addition to cultural and religious factors which will be discussed below, a link can be established between the greater insertion of women in the labour market and thus less financial dependence of both women and men⁷ on marriage, and the highest percentage of divorcees.

As Roussel (1992) and Therborn (2004) note, the secularisation process, i.e. the declining importance of religion in the daily habits and decisions to

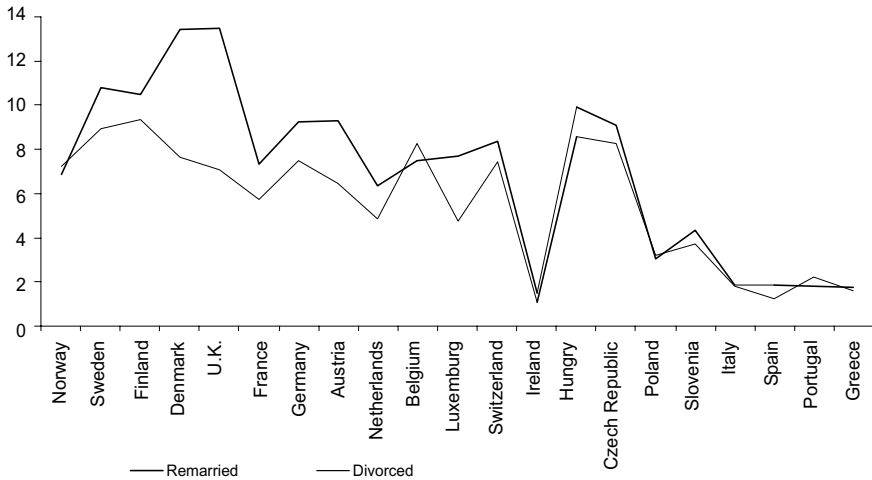


Figure 1.4 Divorced respondents and respondents who have divorced and remarried (%)

Source: *European Social Survey*, 2002; Torres, Mendes, and Lapa (2006).

marry, cohabit or divorce, is another pertinent factor contributing to the rise in the number of divorces in Europe.

The upward trend in divorce witnessed throughout Europe is constant, regardless of the level at which it started. It is set against the backdrop of changes in the family and the so called effects of the greater sentimentalisation of relationships and where the valorising of the perspective that love and understanding should be lasting in a relationship and it is acceptable to end the relationship if this no longer exists, is increasingly hegemonic (Torres, 1996, 2002).

Moving to a summary of the key aspects, the ESS show that the numbers of divorcees and single parents are low which indicates they are transitory situations; marriage therefore remains the main form of conjugalisation and Europeans have a strong desire to live in a conjugal relationship, be it formally or informally. As we shall see below, the central role of family and conjugal life in a person's happiness is of such importance that most divorcees tend to remarry.

A synchronic cross-section shows differences between the ESS countries. On one hand, we have countries like those of Scandinavia, the northern and central Europe with more divorces and cohabitations and fewer religious belonging. On the other, religion plays a more important role in the countries

7 Various studies show that the fact that women work may facilitate the men's taking the initiative to get divorced as they have fewer financial responsibilities, notably in alimony, after the separation (Torres, 1996).

in the south, Poland and Ireland and there are more formal marriages, fewer divorces and less cohabitation.

Nevertheless, any diachronic analysis shows that transformation processes are taking place all over Europe and all of them evolving in the same direction: greater focus on individual interests, added value of the family as well as privacy and personal satisfaction, demands for symmetric positions between men and women⁸ and the devalorisation or resistance to external forms of imposition and constraint. The traditional idea of a formal conjugal relationship with unequal or differentiated and insoluble roles is questioned (Roussel, 1992; Giddens, 1991). And while these global trends are recognised by the population as a whole, it is young people and women in particular who tend to follow this line most closely as we have already seen, and as concluded in other studies (Torres, 1996a).

It therefore seems that the change in the meaning given to marriage, even when marriage takes place in a Catholic ceremony, is what must be underlined. Nevertheless, it must be stressed that in addition to the above mentioned distinctions between European countries, different perspectives also coexist within each country. When speaking of values, we find that while the large majority are distancing themselves from a traditionalist vision of marriage and family, in fact there are still more or less minority groups that adhere to these positions. On the other hand, realities resulting from the rise in divorces such as the social recomposition processes are also becoming more frequent. This is what we will now address in more detail for the Portuguese case.

Remarriage and stepfamilies: dynamics of a process

Remarriage is a demographic phenomenon linked to the changes in family practices that has gained visibility in the scenario of changes intersecting the various sectors of Portuguese society.

A quantitative analysis of remarriage (Ferreira *et al.*, in the press) not only strengthens the affirmation of this “kind of marriage” (Bernard, 1971 [1956]) as a conjugal practice of the Portuguese, but it also allows the identification of a structured set of sociographic characteristics of its protagonists.

Accordingly, there was a steady rise in remarriages in Portugal between 2001 and 2005 from 11,357 to 12,450, or in relative terms from 14.4% to 18.8%⁹. This increase is due mainly to the marriage of divorced men,¹⁰ among

8 Note the role of the feminist movement (differentially effective and present in varying degrees depending on the country) in the overall change of image of women and the couple.

9 In 2000, there were 8,428 weddings in which at least one of the couple was single, i.e. 13% of the total registered weddings in Portugal (Lobo and Conceição, 2003).

women, the practice went from 7.5%, in 2001, to 10.7% in 2005, and among men, from 9.3% to 12.5%. The average age of remarriage is 43 years for men and 38 years for women.

In 2005, more than half the couples (roughly 58%) where at least one member was not single had cohabited before marrying; the figure for couples where both were single did not exceed 17.1%. Although the majority of remarried couples had cohabited before marrying, only 23% had children together before the marriage. The children from previous relationships (about 70% in 2005) clearly represent the majority in the universe of remarriages.

Some of the regular features identified in our study of reference should be highlighted as they help define the behaviour of the remarriage phenomenon in Portugal as well as the profile of its protagonists: divorcees of both sexes and regardless of age remarry much more frequently than widow(er)s; men of all ages remarry more often than women despite the beginnings of clear signs in recent years of a slowing of this trend. Age is a determinant variable in the probability of remarriage and the younger the person, the more likely he/she is to enter into a new conjugal relationship. On the other hand, older women and with less schooling are less likely to remarry after divorcing or becoming a widow. It is stressed that unlike in first marriages, the protagonists of remarriage tend to be older as most have gone through a situation of cohabitation before formalising the marriage. The large majority has children from previous relationships and fewer children in common (children of the recomposition); a Catholic wedding tends to be less common and their qualifications are generally lower than couples marrying for the first time. This is because the male and female divorcees from intellectual and scientific professions, that is, with higher education qualifications, tend to regulate their second conjugal relationships themselves. At present, the decline in marriage is seen particularly in remarriages. And, equally, the very marked increase in cohabitation as well as in non officially registered births out of wedlock seen in recent years in Portuguese society can be said to be due largely to the relationships after a divorce or separation that are not legitimated and the births of children of family recompositions.

Dynamics of a family recomposition process

The sociological study of family recompositions involves analysing them as a process and not a static and isolated moment in a life path (Bohannon, 1970; Duberman, 1975; Furstenberg *et al.*, 1987). Like the first marriage, divorce or single parenthood, recomposition is a time of transition, sometimes fleeting, that inherits the consequences of previous transitions and conditions what follows.

10 Note that the term remarriage means when at least one of the couple is not single.

The research strategy adopted previously that contemplates the time dimension not only allows the transitions to be highlighted but also captures the dynamics involved in a recomposition process (Le Gall and Martin, 1991).¹¹

After examining various moments in the conjugal trajectories of the mothers with custody and the stepfathers interviewed for the research,¹² it was possible to identify the two kinds of dynamics — integration and exclusion — involved in the two structuring axes of the family recomposition process — conjugality and parenthood — in accordance with the objective living conditions, paths taken, practices and representations of the protagonists of these processes and their most relevant characteristics described below and then summarised in table 1.5.

The main hypothesis guiding the research was the confirmation of the interdependence between social classes and the dynamics of family recomposition. Indeed, the integration dynamics were associated to the more educated sectors i.e. intellectual and scientific professions, middle level technicians, and exclusion dynamics to employed workers, independent workers and skilled workers.

In fact, the more educated mothers with custody and stepfathers configured in the integration dynamics by means of the tendency to self-regulate their recomposed conjugality; in other words, the majority opted in favour of cohabitation even when children were born into the stepfamily. This relationship of the recomposed couple favours the autonomy of each; these women prefer to have a romantic or conjugal partner insofar as they maintain close relations with the biological father of their children and the recomposed couple is therefore centred more on conjugality than parenthood. Moreover, all the transitions whether past or present are integrated in the conjugal history of these women; the first conjugal breakups are not always finalised legally, that is, they are separations and not divorces. Divorces are nearly always quick and by mutual consent; the tendency to self regulation also extends to child custody and the biological fathers tend to comply more closely with what was agreed between the former couple. Although the bonds with their children are weakened, many of these fathers participate in their upbringing and sometimes in their daily lives. The stepfathers therefore have a more restricted field of action and there is more ambiguity in the role as the co-parenting relations are strong. The recomposed family live in the same house as the first family of the mother with child custody and her children and it is adapted to the family recomposition; the children circulate freely between the various households but they do not always adopt the parents of their

11 See Lobo (2007).

12 For this research were interviewed 24 mothers with custody and 21 stepfathers. The analysed recomposed familiar configurations presented a similar structure: mother with custody, children and stepfather (single, separated or divorced) with or without children from the first marriage.

Table 1.5 Types of dynamics of family recomposition

	Integration dynamics of economic and school capital (+)	Exclusion dynamics of economic and school capital (-)
Recomposed conjugality	<ul style="list-style-type: none"> – self-regulation (cohabitation) – choice of marriage – women want conjugal partner – centring on conjugality – orientation to the past, present and future 	<ul style="list-style-type: none"> – regulation through law (remarriage) – women's resistance to this legitimisation – women want father for their children – centring on parenthood – orientation to the present (+)
Divorce and parental powers	<ul style="list-style-type: none"> – quick divorce and by mutual consent – separations (self-regulation) – self-regulation of parental powers – fathers' compliance of arrangements set by couple – amicable relations between the former couple 	<ul style="list-style-type: none"> – long and contentious divorces – regulation of parental powers by law – fathers' non-compliance of legally fixed arrangements – continuation of conflicts between former couple or breach or relations after divorce
Biological parenthood	<ul style="list-style-type: none"> – continuity of relations between fathers and children after separation – tendency for mothers to include biological fathers in children's education – biological father more present in the daily lives of children's education 	<ul style="list-style-type: none"> – weakening of bond between fathers and children after divorce – tendency for mothers to exclude biological fathers in children's education – biological father much less present in the daily lives of children's education
Social parenthood	<ul style="list-style-type: none"> – greater ambiguity of stepfather's role – stepfather almost familiar (or friend) 	<ul style="list-style-type: none"> – increased authority of the stepfathers legitimated by mothers – stepfather-father
Co-parenthood	<ul style="list-style-type: none"> – (sometimes strong) co-parenting relations 	<ul style="list-style-type: none"> – no co-parenting relations
Recomposition home	<ul style="list-style-type: none"> – mother with custody and her children in home of first family, adapted to the recomposition 	<ul style="list-style-type: none"> – new home for the family of remarriage or recomposition
Recomposition network	<ul style="list-style-type: none"> – extension of children's circulation area – parents of stepfather not always parents in law and grandparents 	<ul style="list-style-type: none"> – more restricted extension of the children's circulation area – parents of stepfather adopted as parents in law and grandparents
Social representations	<ul style="list-style-type: none"> – nostalgia in relation to nuclear family – stepfamily with specificities and constraints 	<ul style="list-style-type: none"> – identification with the ideology of the nuclear family – tendency to consider stepfamily as "the family"

stepfather as their grandparents. Although some mothers with custody and stepfathers feel a certain nostalgia about their first family, they do not fail to recognise the specificities of the stepfamilies.

The exclusion dynamics that are found in the recomposition processes of the less educated mothers with custody and stepfathers are identified with a greater tendency for the legal regulation of the recomposed conjugality. However, it is the women who put up most resistance to remarriage despite wanting to erase the history of the first family. On the other hand, and because they almost exclude the ex-husband from their lives and those of their children, they want their present husband to assume the role of father. Hence the recomposed couple is centred more on parenthood than on conjugality. The divorces are typically the source of great conflict (there are rarely separations) and take a long time to finalise. Child custody is also regulated by law but, even so, the biological fathers do not comply with what has been established, i.e. they rarely make the monthly child support payment and cut ties with their children. This situation of the biological father's systematic non-compliance with his obligations prolongs the conflict and leads to the break of relations between the former couple. In light of the absence of a co-parenting relationship, mothers exclude the biological fathers from their children's upbringing and thus legitimate the stepfathers' authority. The stepfamily have a new house so that the family of the first marriage can be forgotten and the lives of the domestic group are more closed to the outside, i.e. the space in which the children circulate is not extended much because the relations with the family of the first husband have also been cut and, the stepfather's parents quickly take the place of parents-in-law and grandparents to their son's step-children. In this kind of recomposition, the family project is centred on the family nucleus; the couple reproduces the nuclear family model and considers their recomposed family to be "the family". As one might expect, the hypothesis on the overlapping of the family recomposition dynamics determined by the two axes, i.e. conjugality and parenthood, is also confirmed.

In addition to the systematising of the main characteristics for the two kinds of dynamics involved in the recomposition processes i.e. integration and exclusion, mention should also be made to other questions that are related with the characteristics incorporated in a family transition even though they have "escaped" this dichotomy. Notably, the relation between the first marriages and the recomposition process, the centrality of the mothers with child custody in the recomposed configurations and the influence of the experience prior to recomposition of the biological parenthood on the relations between the stepfathers and stepchildren should also be addressed.

First, the importance of the occurrence and duration of the first marriages in the family recomposition. This variable hinges on the confirmation of the hypothesis about the repercussions of the past in the regulation of the recomposed family configuration. When the first marriages of

the protagonists of the recomposition were short, it means that the ex-partners are still very young after the break up when they return to the matrimonial market which makes it easier to find a romantic partner. Furthermore, the recomposed families of these young ex-partners are fertile, in other words, they have at least one child by the second relationship or marriage. As it happens, it was the younger women in our study who formed new relationships with men of the same ages, but single and without children from previous relationship; as these stepfathers entered a single parent family with a small child, it was easier to establish a close bond with the stepson or daughter. This is the most invisible kind of recomposition as this family structure is easily confused with the nuclear family, especially if the children's biological father is absent.

The interviewees in our study who had had long marriages were not so young and many of them were over the age of 40. Some of the mothers with child custody lived as single parents a little longer, and the conjugal partners they chose were also nearly always divorced or separated and on the whole did not have custody of their children. As they had not lived with their stepchildren when they were very young, these stepfathers had a more distant and less affectionate relationship with their wife's children. The specificities and differences in relation to nuclear family structures of these recomposed family configurations are more difficult to hide because the geometrics are variable and therefore have a more complex structure.

Accordingly, the mothers' centrality is also clear in these configurations. This is not to say however that this centrality represents any more than the continuity of the importance of these women in the upbringing, care and daily supervision of their children, irrespective of the kind of family structure in which they live. Nevertheless, in the recomposed family configurations, the places and roles of all the members of the domestic group are largely determined by these mothers with child custody. In other words, it is they who manage the co-existence between the social and biological parenting relations in these families.

With regard social parenting, some emphasis must also be given to the fact that, together with social class, the previous experience of biological parenting is a variable that conditions the kind of relationships that will be established over time between the stepfathers and the stepchildren. Even though some stepfathers are better able to deal with their wife's children because they had gained experience as fathers before the recomposition, for others being a father who did not accompany the day to day lives of his children may trigger a sense of frustration and a withdrawal from the stepchildren. On the other hand, the stepfathers who only became fathers after the recomposition feel "obliged" to suppress some of the expectations typical at the start of a romance due to the constant presence of children in this relationship.

Conclusion

The analysis made here allows us to paint a picture of the family and its various contours. It reveals that, contrary to recurrent assertions, the family remains a robust institution even though it has been going through a constant process of change accompanied by other social dynamics. Along people's trajectory, the multiple forms and new configurations of the family continue to be the important anchor in people's lives and it is one of the most lasting social groups to which the biographical experiences of each person are linked. The various social mutations are therefore accompanied by and reflect on the different coexisting family models; both the effects of the new behaviours and values in relation to gender roles and the significance of a person's autonomy and fulfilment have been of particular importance in recent decades.

Our analysis of some temporal sets of indicators sheds light on the re-configuration of family lifestyles that are embodied in the delay in the transition to conjugality and parenthood, the decline in the birth rate and the average family size, the rise in divorce rates and children born out of wedlock, among others. It provides evidence that Portuguese society is steadily approaching the social processes of advanced modernity.

The strong participation of Portuguese women in the labour market is another of the outstanding indicators worthy of note, though this is very specific due to the political democratisation process in Portugal and the period which preceded it.

Using Eurostat data, the comparison with other European countries shows that Portugal is closest to Southern and Eastern European countries with more extended families, more adult children remaining in their parent's home and residential units with just one person that are mainly the elderly. This situation is becoming less apparent in Central and above all Northern Europe.

However, these differences are steadily diminishing, and there is a particularly strong trend towards families of couples, with or without children, in all countries. We therefore have a Europe of couples as this is the predominant familial situation either through marriage or cohabitation. Indeed, formal marriage is the most common civil status (58%), followed by being single (28%); separation (2%), divorce (5%) and widow/widower (7%) have little expression. In addition, 20% of Europeans cohabit. As the figures for single parents and divorcees are low, this undoubtedly indicates they are transitory situations and supports the idea of a Europe of couples. Those who divorce or separate return to conjugality either through marriage or cohabitation.

The great changes witnessed in recent years have given rise to the generic picture that is now clear to see: the prevalence of various form of family life, e.g. as a couple with or without children, or living with parents, clearly overlaps the situation of being alone, with or without children. This variety in

the modes of family life, consisting of formal marriage or cohabitation resulting from a first or second marriage or civil union, is what prevails in Europe.

Indeed, the so-called sentimentalisation, privatisation, secularisation and individualisation of modern families and late modernity do not have a splintering effect; on the contrary, they produce recompositions and lead to multiple and more diverse forms of living as a family. And clearly, when we look at the comparison of the different countries more closely, the diversity is broadened.

The valorisation of the family as the absolute priority in the personal life of Europeans is another very marked result. It can also be concluded from the analysis of the sequential importance given to values that there is a modern and not a traditional vision of the family. In most countries, friends are valued after family. Leisure is in third place and then work in fourth, though the position of the last two is exchanged in some countries. There is absolutely no association made between the valorisation of the family and religion. Affection and the time to enjoy it, closely followed by work are undoubtedly the dimensions of life to which Europeans attach most importance.

Still in relation to values, it was extremely interesting to find that there was almost no difference between men and women in the valorisation of work demonstrating that this is as much of a reference for women as it is for men. This helps break down the essentialist visions on the differences between men and women.

A key factor of change in most European countries has also been the growing integration of women in the labour market, both in terms of proportions and the actual hours of work. However, the effects of this reorganisation on the gender roles in the family and at work are highly differentiated; they depend on structural factors such as income, youth unemployment rates and social security systems and above all on the existence of policies that allow the harmonization of the two spheres. Without this support, either women are overburdened or there is an undesirable fall in the birth rate.

Family life unfolds in a specific framework of constraints that, obviously without hindering individual actions and strategies, imposes limits that often give rise to contradictions between what is really wanted and what can be achieved. The difficulties young people, and particularly young women, encounter in becoming autonomous, having their own life and space and even making the desire to start a family compatible with professional fulfilment exemplify this well.

Ultimately, we can conclude that a variety of modern and more plural ways of life and valorising the family prevails in Europe and that the traditionalist vision that emphasised the authoritarian, patriarchal and institutional features of family relations has been set aside. Growing importance is attached to the affective dimension, fulfilment and personal well-being in the family context, as well as to equality between the sexes without

abdicating the idea of having children. Nevertheless, within this general framework, differences are revealed between the countries not only in the way in which this general model is applied but also the emphasis given to the abovementioned values.

Lastly, some of these modern and plural patterns and the ways in which the family recomposition process is started and consolidated gave rise to the last point in this chapter. A study is made of couples where at least the woman with children had already lived in a conjugal situation before the family recomposition. The analysis of the various decisive moments in their conjugal trajectories (dating, first marriage, divorce, single parenthood and recomposition) led to the identification of two kinds of dynamics i.e. integration and exclusion, on the two structuring axes of the family recomposition process i.e. conjugality and parenthood, in accordance with the objective living conditions, paths taken, practices and representations of the protagonists of these process.

As we have seen, the recomposition process means both the construction of a new conjugality and a relationship of social (and perhaps biological) parenthood, insofar as this conjugal couple does not correspond to the biological parental couple for each of the children of stepfamily configurations. The marked valorisation of the biological connections between the parents and children in contemporary societies weaves a web of relational ambiguities in which stepfamilies typically find themselves involved. This ambiguity is undoubtedly strengthened by the figure of the stepfather who is seen by all as the main intruder in the filial blood ties.

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Do European values have a sex?

Anália Torres and Rui Brites

Introduction

The main goal of this chapter is to analyse the differences and similarities between men and women for a specific set of values and attitudes. We conducted a similar exercise in a prior publication (Torres and Brites, 2006) using all the answers — from media exposure to years of schooling — of more than 42 thousand European respondents of the *European Social Survey*.¹ On this text we focus in greater detail only answers to questions concerning more directly to values. We have chosen in particular values and attitudes related to important domains of personal life; to social and political trust; to citizenship and politics, religion and human values.

We stressed before that, contrary to what could be expected, attitudes, opinions and values of men and women are much more similar between them than different (Torres and Brites, 2006). Although research has already shown that the differences within the sexes are much more important than those between them, the truth is that the latter are frequently inflated in a manner that tends to essentialise the biological differences between women and men (Amâncio, 1994; Kimmel, 2000). In fact, in contrast to the common view and the image portrayed in airport best-sellers, which constantly tell us that women and men come from different planets, close study of the differences between the two allow us to conclude, with some surprise, that as Connell states: “(...) the main finding, from about eighty years of research, is a massive psychological *similarity* between women and men in the population

1 The data regards the first Round of European Social Survey carried out in 2002/2003, which included 22 countries: Norway, Sweden, Finland, Denmark, the United Kingdom, France, Germany, Austria, Holland, Belgium, Luxembourg, Switzerland, Ireland, the Czech Republic, Poland, Slovenia, Italy, Spain, Portugal, Greece and Israel, all of which are analysed in this text with the exception of Israel.

studied by psychologists. Clear-cut block differences are few, and confined to restricted topics" (Connell, 1987: 170²).³

Authors such as Prince-Gibson and Schwartz (1998) also analysed the differences between men and women in terms of values and attitudes. Based on a grid of values proposed by Schwartz (1992) and also used in the European Social Survey and a study used in Israel, these authors concluded that there was no significant difference between the sexes with regard to values — both in terms of *structure* and *priorities* (Prince-Gibson and Schwartz, 1998). In other words, men and women give the same meaning, similar importance and grading to the same types of value. Prince-Gibson and Schwartz discussed theoretical proposals and the results of other empirical research on values and gender and have shown how the conclusions reached by their research tend to invalidate the theories that indicate "stable gender difference" focusing more on constructive or interactive perspectives according to which gender attitudes, values or behaviours depend more on specific contexts.

So what the results of the *ESS* again show is that variables such as education, class, generation, or even those regarding economic and cultural conditions in each country tend to explain the differences among Europeans better and more than they explain the differences between the sexes.⁴ In other words, in terms of values and attitudes, the difference is greater between a young woman with a university degree and a lesser educated older woman than it is with a man of the same age with a similar education.

As a rule, it is in this same direction that we point when analysing attitudes and values on gender equality and cultural changes in the world, as Inglehart and Norris do in their book *Rising Tide*, when they compare the changes in different types of contemporary societies: "Nevertheless, the gap that has emerged *between* traditional agrarian societies and post industrial societies is far greater than the gap between women and men *within* each type of society" (Inglehart and Norris, 2003: 160).

2 In his book *Gender*, published in 2002, R. Connell reaffirms his rejection of the "dichotomy of the character" of men and women on the basis of gender differences and discusses more recent research results (Connell, 2002).

3 Even in an analysis of such characteristics as the distribution of attributes connected with masculinity and femininity, it can be seen that, despite the differences in averages, the overlapping of characteristics is much greater than the distance and difference between them. As Kimmel also shows: "In fact, in virtually all the research that has been done on the attributes associated with masculinity or femininity, the differences among women and men are far greater than the mean differences between women and men" (Kimmel, 2000: 15).

4 A fundamental distinction must be made here between sex, an observable variable, and gender, a concept. The latter refers to the differentiation of the social categories "masculine" and "feminine", a social differentiation that starts with the biological differences between men and women and is constituted as an ideology or cultural construction that defines the "appropriate" behaviour and attitudes of men and women in a given specific social context (Torres, 2001).

This convergence does not eliminate some differences in values, attitudes and behaviours between the wider group of men and that of women. In fact, there were differences in terms of position between European men and women which were observed regularly throughout the 21 countries studied — thus showing true sociological regularities. On the other hand, and with regard to certain topics, it was also observed that the differences among countries were higher than those observed between men and women within each country, just as Inglehart and Norris noted regarding the differences among societies.

The results obtained allow us to paint an interesting picture of Europe. By and large, the intention was to deal with the data for the 21 countries but, for operative reasons in the analysis, the countries were also given a certain grouping. Although always somewhat arbitrary, it captures differences considered generally consistent, as is the case for the difference between the north and south of Europe. But it was also thought that it made sense to distinguish the Scandinavian countries within the “north”, and then group the others into the north and centre,⁵ followed by the countries of the enlargement⁶ and, finally, southern Europe.

The socio-demographic data also enabled us to identify other differences and similarities between European men and women. Thus, data on schooling and religious belief are also briefly analysed, and we have sought to verify not only possible differences between the sexes but also generational differences. In this sense, it is once more confirmed that younger women in most European countries have overtaken men in terms of the level of education reached. This, together with the growing tendency for women to participate in the labour market, may help explain the greater convergence between men and women in a wide range of issues.

Indeed, it is important to emphasise the great transformation represented by women’s attainment of their present educational levels. In diachronic terms, European women entered the 20th century with very low schooling levels and left it in a more advantageous position than men. This expansion reveals that women have shown, with what they have achieved over time, that biological differences are not directly reflected in different intellectual or performance capacities.⁷ In fact, we can also conclude, as some authors underscore: “that the most

5 This set of countries is extremely heterogeneous.

6 We refer to those countries in the most recent EU enlargement that participated in the first ESS round: Hungary, the Czech Republic, Poland and Slovenia. This is how they will be referred to below.

7 Even the most recent discoveries in the neurosciences, which show, for example, certain differences between the male and the female brain, are normally extremely cautious when it comes to translating these differences into behaviour, almost always going back to the relationship between the biological and the social (Connell, 2002; Cahill, 2005; Dortier, 2005).

important change in recent decades has been the revolution in gender roles that has changed the lives of most people in advanced industrial societies" (Inglehart, Norris and Welzel, 2003: 104). As the same authors point out, this great change in practices and values has not always been considered of importance or adequately analysed.

These changes and the considerable advances in the equal rights area in western societies, or the great convergence in positions that we have mentioned, mean that the real inequalities between men and women, which are clear from a series of other indicators, are all the more absurd, even if sociologically explicable. Women earn less than men, have fewer opportunities of employment and paid work, do not occupy managerial positions even where they are in the majority and are clearly under-represented in decision-making political posts in governments and in parliaments. When they work outside the home, which is the case for most European women, they combine this work with the responsibility for carrying out a range of tasks like looking after the children and doing the household chores (Torres, 2004; Torres *et al.*, 2004). All the surveys on the use of time demonstrate the work overload that women have to cope with, which leaves them with little time for other activities. Among other factors, the exclusion of women from the spheres of political decision-making and power can also be attributed to these objective limitations which, ultimately, have the function of reproducing male domination (Bourdieu, 1999). And if women are far less represented in the political sphere, the day-to-day problems that affect their lives and restrict them become also less visible in that public forum (Viegas and Faria, 2001).

All this makes it clear that women's progress in education and labour market participation can help to explain experience that is partly similar — which in turn may explain the fact that the ESS responses did not differ greatly in the variable of sex — though at the same time this progress makes the exclusion of women from politics all the more shocking.

Though it is not the purpose of this text to analyze such inequalities, contradictions and paradoxes, it seemed to us of importance to develop a transverse analysis in order to identify similarities and differences, since it was known from the outset that the former, as shown above, far outweigh the latter. This recognition may help to reveal the errors to which essentialist positions may lead.

In fact, it is easier, though illusory, to attribute the inequalities of sex and gender to the different "nature" or biological predispositions of men and women. It will be more useful and productive to identify gender inequalities in the form that the positions of power in the social structures are distributed and the way that they are reflected both in women and men's lives and on a symbolic level. This approach helps to explain why, in values and attitudes, there are notable convergences between the two sexes and, if there are differences, what their occurrence and distribution may involve.

Family, friends and leisure: the most important in life

Family, friends and leisure were considered the most important aspects in life, and in this order, by people in the 21 countries (figure 2.1, table 2.1). Work is in fourth place right after values associated with feelings of affection. As for religion, voluntary activities and politics, these seem to have average figures below the middle of the scale.

The analysis per country undoubtedly indicates that family comes first in every country. As for friends, free time and work, these are clearly different in this hierarchy in Scandinavian countries, whereas in some northern European countries the order is different, in particular in eastern and southern European countries. The averages for religion, voluntary work and politics come below the middle of the scale; however, religion is above the average in Ireland, Poland, Italy, and Portugal; and voluntary work is second in Luxembourg, Italy, Spain and Portugal. Politics, which is only slightly above the middle of the scale in Germany, is the least important aspect (figure 2.1).

These results transmit three fundamental ideas: first, they confirm findings from other studies and research in this area (Almeida *et al.*, 2000), i.e., once more, and contrary to common sense views, family is still an essential reference for Europeans. It is an acquired value for all, and it is noted that the figures are very close even in Scandinavian countries to those for Spain and are even higher than Italy in terms of importance given to family. Secondly, they show that you can clearly speak of common values within a European context. Indeed, differences among countries in the dimensions in life that everyone values are not very relevant and this is particularly true for family, friends, free time and work; likewise, the hierarchy in the choice of values is almost the same (figure 2.1). More relevant differences only relate to the importance given to religion and voluntary work. Finally, it should also be noted that the value given to family is independent of religion; in other words, contrary to more traditional views, this analysis also confirms what other studies have shown — that in Europe there is a modern idea of a family that is compatible with equality among men and women and with the individualisation logics (Torres, Mendes and Lapa, 2006; Torres, Cardoso and Coelho, 2007).

Thus, and despite the enormous changes seen in this domain, family is still the main area of personal investment. What do seem to have changed are the family models, the representations and the ways in which investments are made in the family. Phenomena such as a decrease in fecundity, higher rate of divorce and cohabiting cannot be interpreted as symptoms of decline, but rather as signs of new investments and ways which obviously co-exist with other new types of problem (Torres, 1996). Now, families tend to define themselves as a setting where the aim is for the individual to be recognised and maintain individual freedom and space in order to obtain emotional fulfilment.

Table 2.1 What is important in people's lives, by gender according to sex

How important is each one of this aspects:	Men			Women			Sig.	Eta2
	Average	Standard deviation	Order	Average	Standard deviation	Order		
Family	9.2	1.5	1	9.5	1.2	1	0.000	0.010
Friends	8.2	1.8	2	8.3	1.8	2	0.000	0.003
Leisure time	7.7	2.0	3	7.6	2.0	3	0.000	0.001
Work	7.5	2.7	4	7.3	2.8	4	0.000	0.001
Religion	4.2	3.3	7	5.3	3.3	5	0.000	0.026
Politics	4.5	2.6	5	4.0	2.6	7	0.000	0.010
Voluntary work	4.5	2.9	5	4.6	3.0	6	0.037	0.000

Scale: 0=not important; 10=extremely important.

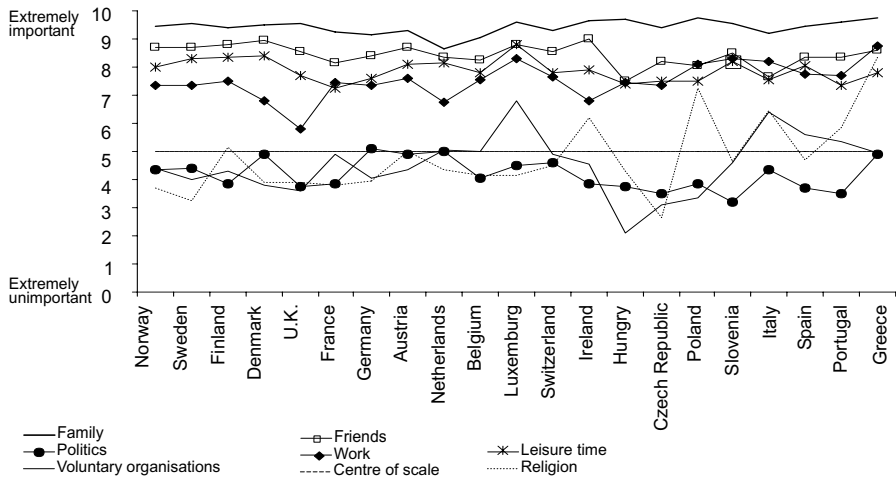


Figure 2.1 Importance of each of the aspects in life (average)

Notes: Family: $F(20,36954)=65.308, p=0.000, \eta^2=0.034$; Friends: $F(20,36887)=63.119, p=0.000, \eta^2=0.033$; Free time: $F(20,36737)=37.006, p=0.000, \eta^2=0.020$; Politics: $F(20,36782)=91.258, p=0.000, \eta^2=0.047$; Work: $F(20,36373)=142.787, p=0.000, \eta^2=0.073$; Religion: $F(20,36849)=352.853, p=0.000, \eta^2=0.161$; Volunteer Organisations: $F(20,36557)=256.824, p=0.000, \eta^2=0.123$.

Within these seven aspects considered, the similarities are greater than the differences between men and women (table 2.1). Indeed, the order of importance of each aspect is the same up to number four; but then there is no consensus with religion – coming last for men and fifth for women and the opposite being true for politics.

When considering only family, work and religion and the differences between the sexes and among countries (figure 2.2), we find there are almost



Figure 2.2 Importance of family, work and religion in people's lives according to gender (averages)

Note: Variance by sex. Family: $F(1.36954)=355.855$, $p=0.000$, $\eta^2=0.010$; Work: $F(1.36373)=36.361$, $p=0.000$, $\eta^2=0.001$; Religion: $F(1.36850)=997.714$, $p=0.000$, $\eta^2=0.026$.

no differences with regard to work. Thus, once more contradicting stereotypes which tend to consider that men by “nature” give more importance to work and women to the family, this data shows that the differences between the sexes are much smaller than the differences among countries.

The importance given to work and family reveals that women invest or want to invest on both fronts; this refutes the current idea — often justified by the fact that maternity implies that women have an interrupted work pattern (Klement and Rudolph, 2004) —, that because women are employed, they do not give as much importance to family or that men consider work to be more relevant than family. It is true that these are very general positions in terms of value. Research results from qualitative studies have also shown that, within the scope of discourse, men really value family life and believe women have the right to be personally fulfilled through their job, whereas in *practice* they tend to act as though the responsibility for the respective fields followed the old sexual asymmetries (Torres, 2004).

As for women, what this data reveals — and this is probably new information — is that work is an important part of their social identity, a value in itself, which goes beyond the economic need of having two breadwinners in the house. In fact, data from other studies reveals the same conclusions (Torres *et al.*, 2007). Within this scope, this can be seen as a European convergence of shared symbolisms. However, the possibility of women seeing their wish to invest in both work and family congenially accomplished depends on

concrete and specific conditions; as these are different in every country, they may in some cases create dilemmas and impose constrained options.⁸

The importance of the so-called “life cycle” also confirms the hierarchy of the seven domains analysed, with few exceptions. Indeed, whatever the age group, men and women put family first and friends second, i.e. feelings and affection are central for both men and women irrespective of age. Leisure activities come third and work comes fourth among the younger and the older groups, regardless of sex. Those aged between 30 and 59 put work in third position, with men rating it as important as friends and women as important as free time.⁹ Women in all age groups give more importance to religion than men, although only older women place it above the middle of the scale. Voluntary work and politics are considered the least important in all age groups.

At the same time, education¹⁰ which, as it is known, assumes growing importance in instilling values,¹¹ presents significant negative correlations with family¹² and religion¹³ and positive ones with friends,¹⁴ free time,¹⁵ work¹⁶ and politics.¹⁷ Voluntary work is the only aspect that does not have significant correlations with education. Note that the direction of the correlations is the same for both men and women. In other words for both men and women, the higher the education, the less importance is given to family and religion, on the one hand, the more importance is given to friends, leisure, work and politics on the other.

Social trust and political trust: no differences in gender

As several authors have stressed, social trust is closely connected with “social capital” and is related with interests and social questions that, as Newton (2004: 61) notes, extend “from the payment of taxes, educational success and economic growth to contentment with life, length of life, community involvement and the exercise of the vote”. For that author, “the less people trust, work with and cooperate with their fellow citizens and the more they disconnect themselves from the collective and voluntary life of their communities, the weaker and less efficient the social institutions of civil society will be. The less trust that citizens have in their political leaders and government institutions, the less efficient the government will be and the greater the probability of citizens seeing little credibility in their political system”.

From this perspective, and as we are interested in understanding the relationship between social trust and political trust, we have created two summary indexes.¹⁸ The first — Summary Index of Social Trust¹⁹ — includes three

8 A “maternalist” ideology not favouring women’s participation in the labor market may mean that women are faced with the personal dilemma of managing the family/work relationship and, in certain countries, it may even contribute perversely and unintentionally to low fertility (Torres, Mendes, and Lapa, 2006).

indicators²⁰ with the following statement “believes that you cannot be careful enough when dealing with people, or believes most people can be trusted” (interpersonal trust); “believes most people try to take advantage of others whenever they can, or believes most people are honest” (honesty), and “believes that most of the time people are worried about themselves, or believes that they try to help others” (altruism). The second — Summary Index of Political Trust²¹ — includes four indicators: trust in the Parliament, in the Legal System, in the Police, and in Politicians. As would be expected, both indexes are strongly correlated in the positive sense²² thus indicating that those who trust socially also trust politically.

There are no differences between men and women for the three indicators that make up the summary index of social trust (Figure 2.3) and the four that make up the summary index of political trust. As for the differences between countries, there is a decrease in social trust²³ and political trust²⁴ from Scandinavian countries — more trusting — to northern and central Europe, to southern Europe and to countries from the post-communist Europe (figure 2.3 and 2.4). Accordingly, as Newton points out (2004: 71-72) “the more democratic a country, the more trust there seems to be amongst the population. [...] a democratic and efficient government, as well as the appropriate functioning of public institutions helps to create the circumstances in which trustworthy behaviour does not require much effort and is highly valued”.

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- 9 That is, men in this age group seem to value social moments more, whereas women value rest. Could this be another sign that household chores are not equally divided, meaning that women are more overloaded in this area and therefore value free time as no work time?
- 10 Education is understood here as years of finished schooling.
- 11 As we know, school has a determinant importance in instilling values because, together with the family, is an instance for socialisation par excellence.
- 12 $r(36226)=0.049; p=0.000.$
- 13 $r(36135)=0,188; p=0.000.$
- 14 $r(36172)=0,124; p=0.000.$
- 15 $r(36040)=0,103; p=0.000.$
- 16 $r(35666)=0.072; p=0.000.$
- 17 $r(36090)=0,200; p=0.000.$
- 18 The creation of the synthetic indexes referred to in this presentation, which was inspired by Halman (2003), include the factorial scores that result from an analysis into main components (AMC) with a single dimension, and which were later transformed algebraically so as to facilitate their comprehension, as suggested by Vaus (2004). In this way the minimum rounded value is made to coincide with zero, and the maximum with the maximum of the original scale of indicators.
- 19 Explained variance: 53.2%; Cronbach's Alpha: 0.77.
- 20 Already used in other surveys on values and attitudes.
- 21 Explained variance: 65.3%; Cronbach's Alpha: 0.82.
- 22 $r(20)=0.775; p=0.000.$
- 23 $F(20.36514)=238.059; p=0.000; Eta^2=0.115.$
- 24 $F(20.35248)=167.753; p=0.000; Eta^2=0.087.$

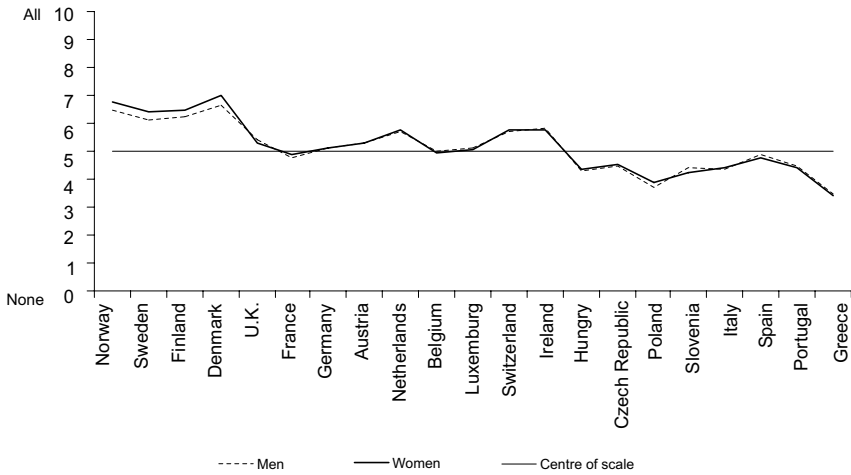


Figure 2.3 Summary Index of Social Trust (averages)

Variance by sex: $F(1.36512)=0.967$, $p=n.s.$ Variance by country: $F(20.36514)=238.059$, $p=0.000$; $\eta^2 = 0.115$.

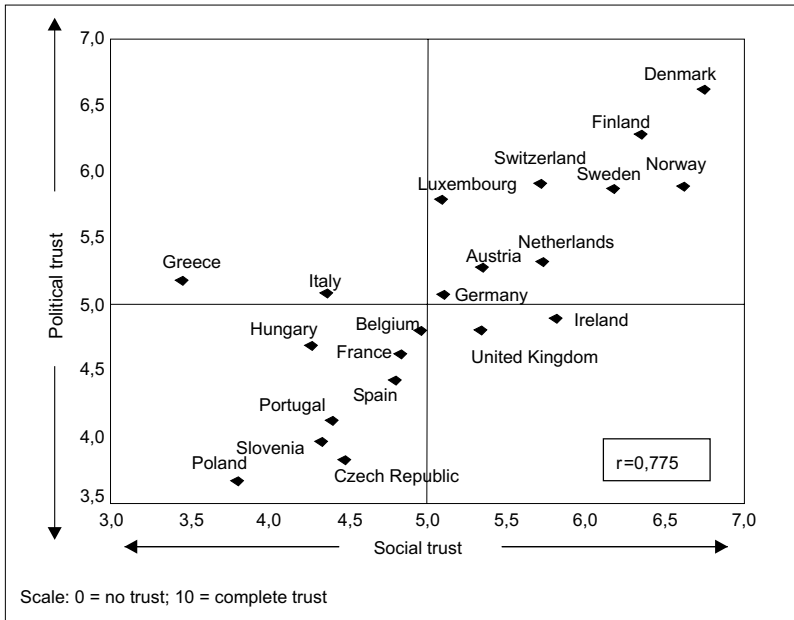


Figure 2.4 Summary Indexes of Social Trust and Political Trust by country (averages)

The type of democracy in some central European countries, such as France and Spain, as well as southern European and the extended EU countries needs to create internal mechanisms capable of reinforcing social trust and political trust and, in turn, improving the quality of the respective democracies. As Kriesi (2004: 191) says: “Trust is a kind of shortcut which lets us escape from processing a lot of information [...] It is an element of emotional equivalence to the cognitive schemes, which constructively simplifies the world. Despite knowing little of how trust works in making political decisions, we assume that those who trust the authorities will more easily support them than those who do not”.

With regard to Portugal which, together with Slovenia, the Czech Republic and Poland,²⁵ registers the lowest figures for both types of trust, the low levels of interpersonal trust have already been noted and it is not easy to find variables that explain this situation (Halman, 2003; Cabral, 2005). For example, religious feeling (which is high in Portugal like in other southern countries and some EU enlargement countries, e.g. Poland — countries which also have low levels of social trust) is not positively related to the levels of trust and equity as Halman correctly indicated (2003: 257-292). Even Fukuyama defends the opposite, and the ESS results seem to prove him right. According to Fukuyama, if there is any relationship between religion and trust, it should be negative and not positive, as he says: “apparently religion has contradictory effects on trust; fundamentalists and people that go to church tend to be more distrustful than the general average” (Fukuyama quoted by Fernandes, 2003: 182).

Citizenship values: no differences between the sexes

It is particularly important to understand what the predominant citizenship values are when discussing individualisation in democratic societies. Trying to capture these type of values, the ESS considered the following set of indicators: “having one’s own opinion”, “complying with every law and regulation”, “voting in every election” and “helping those who are worse off”. The figures registered for these indicators are the highest in all countries — above the middle of the scale. This is followed by “working in volunteer organisations” which oscillates around the middle of the scale and where Luxembourg, Italy and Portugal have the highest results and Hungary and the Czech Republic the lowest. “Being politically active” comes last for every country and it is only in Poland, Portugal and Greece that figures are slightly above the centre of the scale.

25 Note that, unlike Portugal which has had a democratic regime for the last 30 years, Slovenia, Poland and the Czech Republic are recent democracies.

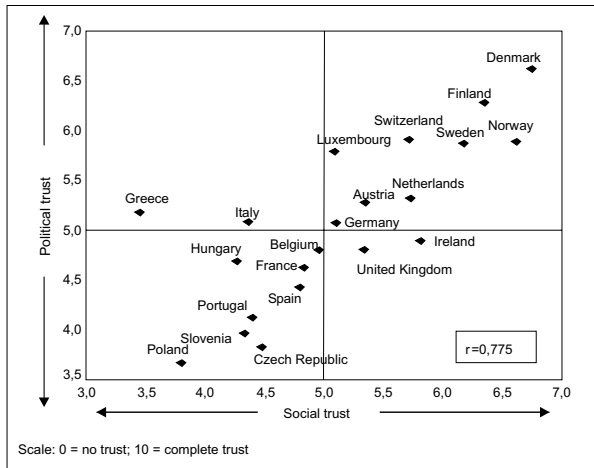


Figure 2.5 What is important to be a good citizen (averages)

Scale: 0= not important; 10= extremely important.

Yet again, the profiles for men and women are quite identical with women showing slightly higher figures for “compliance to laws and regulations”, “voting in elections” and “working in volunteer organisations”; the difference for “helping those who are worse off” is more marked which is indicative of the female tendency for values that could be called “self-transcendent” according to Schwartz (Torres and Brites, 2006).

It is interesting to note that the lowest score in every country goes to a value like “being politically active” which is below the middle of the scale in the vast majority; in other words, it is believed to be of little importance to good citizenship. This may imply political apathy and therefore a certain distancing from politics which is more worrying the less circumstantial it is; on the other hand, it may indicate the feeling of distrust towards politicians.²⁶ However, the value given to the need to “vote in every election”, which comes third on the scale of importance, makes us believe that this is more of a circumstantial distrust for politicians than political apathy. Notwithstanding, there is the question of the high abstention levels in consolidated democracies in the European Union which, though worrying in internal elections, becomes exponentially greater in community elections like those for the European Parliament. Is it apathy or mistrust in the institution’s ability to intervene? Whatever the reason, it

²⁶ “Trust in politicians” and being “politically active” are positively correlated ($r(35871)=0.224$; $p=0.000$).

is important to question whether the high abstention levels mean that the electors are unable to identify with the candidates, or whether they do not believe in the political effectiveness of voting.

Political self-positioning: women are more left-wing

Most people prefer the centre and avoid placing themselves to the right or to the left. We are of course referring to large groups (countries, men/women, etc.) and we know how the “central limit theorem”, derived from statistics, has a homogenising effect that conceals individual differences or those of small groups. It is well known that we are speaking of something non-existent when we speak of averages. Thus, the data must be interpreted broadly and it must be emphasised that only small variations for the average in the left/right dichotomy are being referred to. However, these small variations might be considered by some to be relevant and indicative of clear regularities. Looking at the differences between the sexes, for example, women always position themselves slightly to the left of men in almost every country, except Luxemburg, Poland and southern Europe, where they are slightly to the right.²⁷

This verification is convergent with the results from the surveys on political self-positioning, and even on voting, conducted since the 1980s in the United States and in most European Union countries. In fact, women do systematically position themselves more to the left than men, even with voting (cf. Inglehart and Norris, 2003). This trend has been described as changing from a *traditional gender gap* to a *modern gender gap*. Whereas in the 1950s and 1960s it was an accepted fact that women always placed themselves to the right of men, since the 1980s they have tended to position themselves to the left of men, and systematically so in more developed countries.

The explanation given for this trend — which was set in the USA in the 1980s when women started giving their vote to the Democrat party — has been that left-wing parties tend to give more committed support to the Welfare State and to public services providing child and family support, to be more ecologically oriented and more concerned with education and reproductive rights; these are positions to which women are particularly sensitive as various opinion studies have shown (Inglehart and Norris, 2003). In matters regarding gender equality, greater participation and affirmation of women in public and political life, of which the quota issue is an example, the

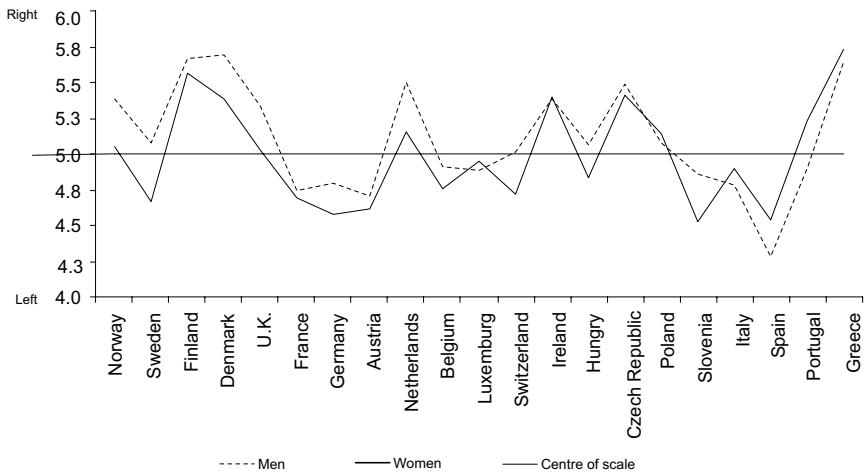
27 However, these results must be interpreted carefully; it is known that given that political self-positioning is structured intersubjectively, we must not forget when making international comparisons that the left/right classification does not mean the same in every country. That is, being right- or left-wing is not the same in a stable democracy as in more recent democracies.

Table 2.2 Religion declared predominant

Political self-positioning				
Religion	Catholic/Orthodox (>75%) ^a	Catholic (45-65%) ^b	Protestant majority ^c	Mainly without a religion ^d
Men	4.8	4.9	5.6	5.0
Women	5.0	4.7	5.4	4.8

Scale: 0 = left; 10 = right.

Notes: ^a Ireland, Poland, Italy, Spain, Portugal and Greece; ^b Austria, Luxemburg and Hungary; ^c Norway, Finland and Denmark; ^d Sweden, the United Kingdom, France, Germany, Holland, Belgium, Switzerland, Czech Republic and Slovenia.

**Figure 2.6** Political self-positioning (left/right) (averages)

Variance by sex: $F(1.32315)=16.321, p=0.000, \eta^2=0.001$. Variance by country: $F(20.32314)=32.406, p=0.000, \eta^2=0.020$

fight to affirm their rights and to combat discrimination are also subjects that have a tendency to lean towards the left.

Indeed, at first it was thought that the explanation for the fact that women were making political choices similar to those made by men, leaving their former more right-wing positions, was that they had more years of schooling and participated more in the labour market. However, many studies have shown that there is a persistent difference between the sexes and that women are always on the left of men even when those variables are controlled

(cf. Inglehart and Norris, 2003). As for their position on the role played by the state and by the market in the economy, we will see later that these differences remain and it seems that this is a consistent choice which is even more marked in younger generations.

And how can the systematic differences in southern countries be explained where women remain more to the right unlike other European women?²⁸ When trying to explain this difference, it was noted that there was no relationship between their political self-positioning and variables such as age, education and the rate of female activity. There were, however, small variations related to a strong predominance of the Catholic religion, as table 2.2 shows and as Lipset had already referred (Lipset in Inglehart and Norris, 2003). It is precisely in countries where declared Catholic/orthodox religion is very predominant (75%), e.g. the four southern European countries and Poland, that women position themselves politically to the right of men.

Alternatively, the set of factors that make women position themselves to the left in other European countries may be less marked in southern countries.²⁹ Indeed, this political self-positioning more to the right could be explained by the fact that the Welfare States are weak in southern countries and take fewer measures that protect interests to which women are more sensitive, or that the roles played by each family member continue to be more traditional. Moreover, with the exception of Portugal, the female activity rates are lower in these countries and greater importance is given to religion. Equally, feminist movements undoubtedly have less power in these countries as they usually have a left-wing connotation.

Turning now to how the left/right-wing positions change by generation in the different major groups of European countries. Figure 2.6 shows that there is a change in positions from the right to the left, from the oldest to the youngest, in all major groups of countries except in the recent EU enlargement countries where the change is in the opposite direction, moving from the left to the right.

Women in Scandinavian countries are systematically found to the left of men regardless of their age; those born at the time of the 2nd World War (1941-1950) are the exception where self-positioning coincides with their male counterparts. Women in northern and central Europe are systematically to the left of men regardless of age, with the similar exception for those born

28 However, note that differences are minimal and, with the exception of Spain, are not statistically significant.

29 It must also be said that in southern countries — men and women together — assume varied positions. Spain is the most left-wing country (although more to the right than men, Spanish women are more to the left than all the other southern European women. Greece is the most right-wing country of all the southern European countries, followed by Portugal and Italy.

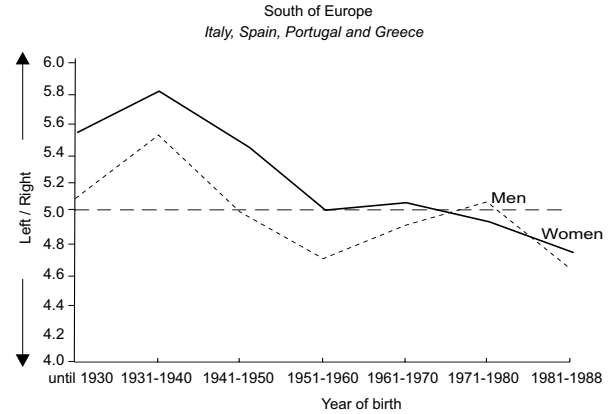
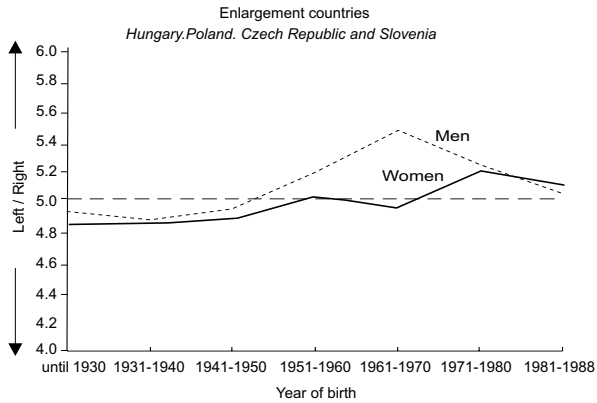
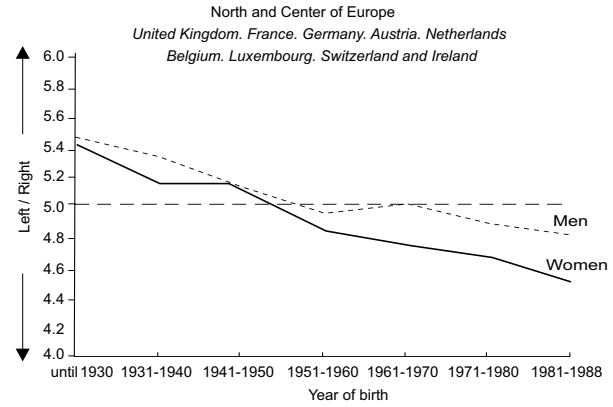
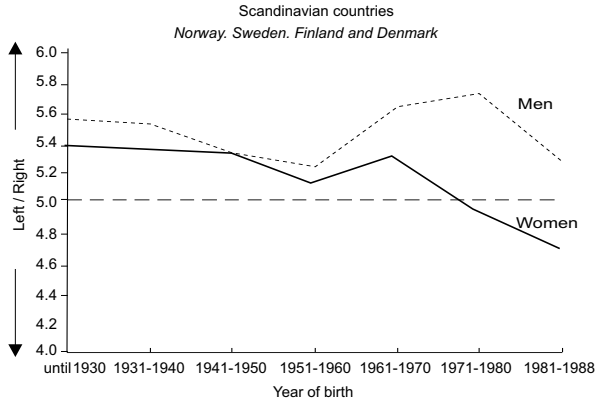


Figure 2.7 European's political self-positioning by gender and age (averages)

in the 1940s to that of Scandinavian countries and whose self-positioning is the same as that of men. There is also a systematic movement to the left; the only exception is women born in the 1940s who remain constant. In the EU enlargement countries, women are to the left of men regardless of their age, although overall and unlike all the other countries, their movement is from the left to the right. As mentioned above, the situation is completely different in southern Europe as women systematically position themselves to the right of men regardless of age, with a slight exception for those born in the 1970s.

Women more distanced from politics

The distancing from politics is known to condition the full exercise of citizenship. It is therefore also important to understand whether there are differences between men and women at this level. In fact, the differences prove to be more distinct in this area. Men in every country express more “interest in politics” and believe they could “participate in a group dedicated to political matters”. On the other hand, women say that they find “politics complicated” more than men and that they “find it difficult to take a position on political matters”.

According to the “summary index of political distancing”, which summarises the information on four instrumental indicators — “interest in politics”, “politics seems complicated”, “availability to participate politically” and “difficulty in taking political positions”³⁰ — it can be concluded that there is a very similar pattern around the centre of the scale in the 21 countries, with France and the southern European countries showing greater distancing (figure 2.8).

Schweisguth (2004: 257) had already drawn attention to the fact that in France it is accepted that politics is going through a crisis and that there is such a lack of interest in politics that one could speak of a trend towards depoliticisation. The most frequently given cause for this depoliticisation was “the behaviour of the political actors themselves”, in particular the numerous political scandals that put their credibility in question. Nevertheless, the recent participation in the European Constitution referendum seems to show that high levels of distancing/distrust are not compatible with the amount of protests against the political mainstream.

30 The index includes the following questions: *what is your interest in politics?*, with a response scale that varies between 1 (very interested) and 4 (not interested); *how often does politics seem so complicated that you don't really understand what is going on?*, with a response scale that varies between 1 (never) and 5 (frequently); *do you think you could participate in a group dedicated to political matters?*, with a response scale varying between 1 (I'm sure I couldn't) and 5 (I'm sure I could), and *How difficult is it to take a position on political matters?*, with a response scale varying between 1 (very difficult) and 5 (very easy). The indicators have been standardized to enable a correct interpretation of the index and thus, the scales for the last two have been inverted. Explained variance = 53.5%; Cronbach's Alpha = 0.70.

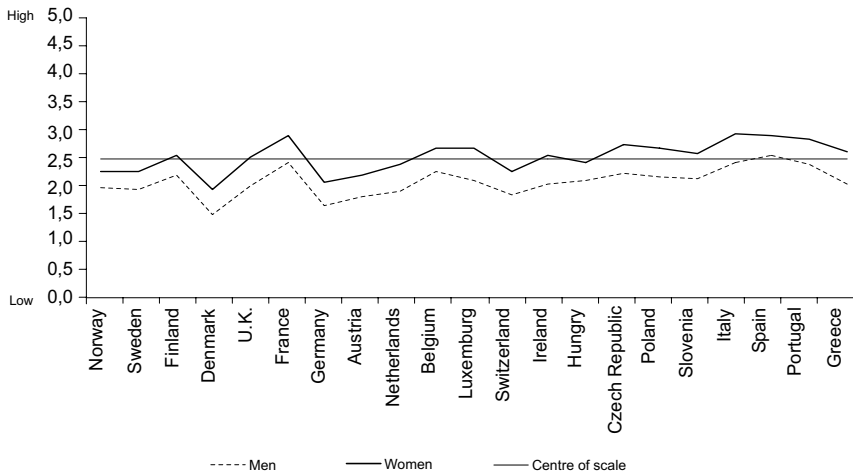


Figure 2.8 Summary index of political distancing (averages)

Variance by sex: $F(1.35910)=2044.37$, $p=0.000$, $\eta^2=0.05$. Variance by country: $F(20.35910)=193.45$, $p=0.000$, $\eta^2=0.10$.

Within this context, it should also be remembered that, as Fernandes (2004: 36) points out: “there is no democracy without participation [...] A political regime may be free and democratic by law and by its institutions, and not be so by its customs and social life. Just as it can be free and democratic due to its customs and social life, and not be so by law and its institutions of power. A truly democratic society is one which is so because of the law and its institutions, but in particular thanks to people acting democratically in their daily lives”.

Going back to the difference between the sexes — the most relevant factor for our analysis — we can conclude that women are more distanced from politics than men in every country and very consistently.

This difference towards the universe of how “politics” works can be explained by the conjunction of different structural or cultural factors. On one hand, most of the objective conditions in the daily life of these women, notably the strict justification of the time taken up by their professional activity and family responsibilities, makes it difficult for them to have time for any kind of political participation; this is very clear in the Portuguese case (Torres *et al.*, 2004). It also seems appropriate to remember that one of the most subtle forms of male domination is that which is felt through women’s self-responsibilisation for family-related tasks even though both men and women spend the same time at work and these tasks should therefore be shared equally.

However, the fact that women show less interest in politics and are less available to participate in this field may also be explained by specific obstacles such as the way in which institutions and the actual political space work (Viegas and Faria, 2001) because they run at a pace that is incompatible with the pace of family responsibilities — from which men seem to be exempt. Moreover, based on the results from surveys in various countries, it has also been persistently concluded that women’s “political activism” is always less than men’s though the differences are not so great in more developed countries. This also demonstrates that older, more religious, less educated women who are not in the labour market are even more distanced from politics (Inglehart and Norris, 2003). However, as can be seen in figure 2.8, the ESS data conclude that a difference is found in every country and it is almost constant. Maybe this is why (as mentioned above) daily life and institutional and cultural constraints should be taken into account as factors that condition women’s interest and participation in politics.

The majority in favour of regulating the economic sphere

Apropos the different positions between the sexes, the following results tend in the same direction as our studies pertaining to right/left-wing positioning. Indeed, women also most defend the state’s intervention in the economy and the need to rebalance the differences in income; they also believe (more than men) that workers need to be defended by strong unions, as table 2.3 shows. Thus, women are more to the left than men in this area as well.

Very similar results were obtained by the World Values Survey and European Values Survey 1999/2000 (Inglehart and Norris, 2003) in the answers to two items that are directly related to the state’s role in the economy,³¹ demonstrating yet again that women generally and in most countries in the world are more supportive of the state’s intervention in the economy than men.

From a more global point of view and again analysing the results of the ESS for the 21 countries, it is found that most are in favour of this intervention; they disagree that “the less the Government intervenes in the economy, the better it is for the country” and, with the exception of Germany, Austria, Switzerland and Slovenia, the figures are below the centre of the scale. In other words, regardless of the political colour of their respective governments, most Europeans favour the state’s intervention in the economy, the reduction of social inequalities, and also believe it is important to have strong unions.

31 “Private ownership of business and industry should be increased” (10) Government ownership of business and industry should be increased” (1) and the government should take more responsibility to ensure that everybody is provided for (1) People should take more responsibilities to provide for themselves (10).

Table 2.3 Regulation of the economic sphere by sex (percentages)

		Men	Women	Total	χ^2
The less Government interferes in economy the better for the country	Agree	34,3	29,4	31,8	(2)=152,815; $p=0,000$
	Neither agree/nor disagree	26,0	31,3	28,7	
	Disagree	39,7	39,3	39,5	
The Government should take measures to reduce income differences	Agree	67,5	73,5	70,6	(2)= 290,25; $p=0,000$
	Neither agree/nor disagree	12,7	13,3	13,0	
	Disagree	19,8	13,1	16,3	
Workers need to be defended by strong trade unions	Agree	71,1	74,5	72,9	(2)=93,677; $p=0,000$
	Neither agree/nor disagree	14,8	14,7	14,8	
	Disagree	14,1	10,8	12,4	

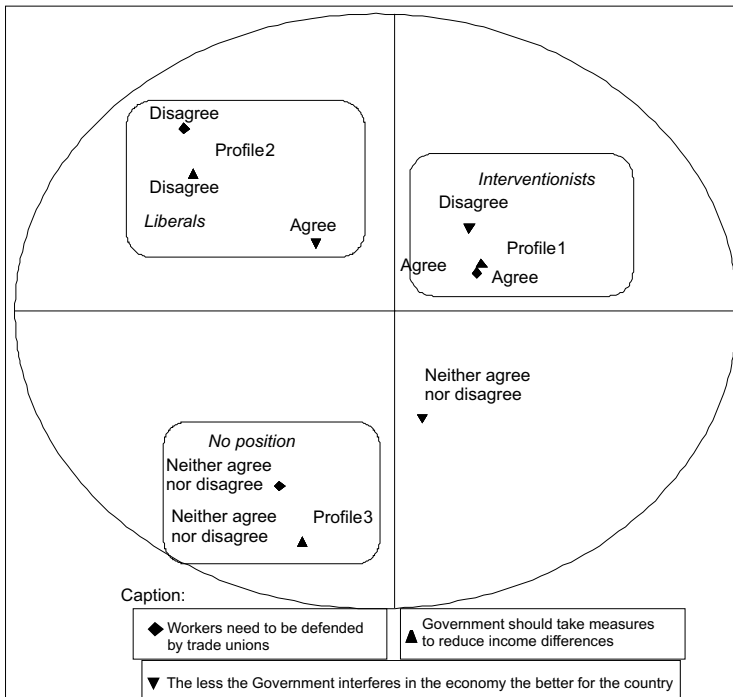


Figure 2.9 Regulation of the economic sphere

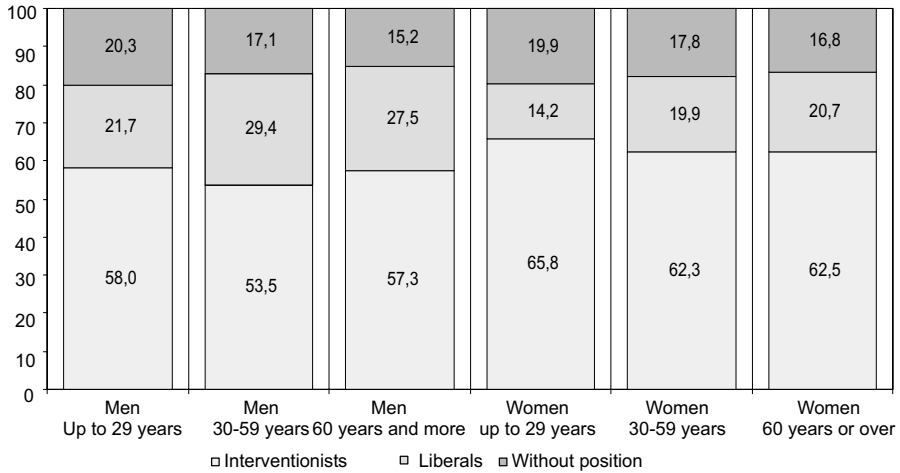


Figure 2.10 Regulation of the economic sphere by profile (percentages)

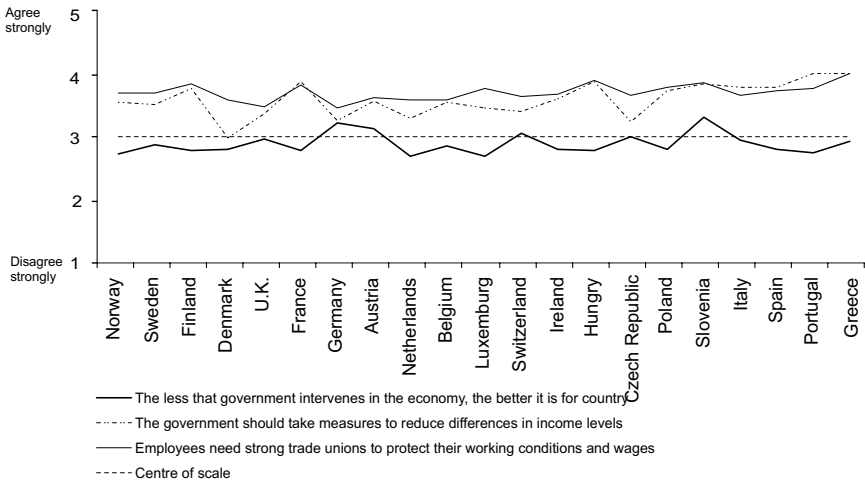


Figure 2.11 Regulation of the economic sphere by country (percentages)

It is worth examining the crossed effect of age and sex for the three con-
 jugated indicators.³² As figure 2.9 shows, three distinct profiles that can be
 identified: liberal, interventionist and with no position.

As can be seen in figure 2.10, the distribution of respondents into the
 three profiles shows that the majority of both men and women in Europe in

the three age groups are in favour of economic intervention. It also reveals that men are greater supporters of economic liberalism than women, whereas the percentage of those with no position in the three age groups does not exceed 20.3% and is slightly higher for the younger group.

On analysing the indicators separately, some trends should be highlighted, again considering age and sex, for the group of Europeans. On one hand, the position on the state's intervention in the economy is where we find the least difference both in terms of age groups and sex. But it is the younger group and, within this group, the women, who most defend the need for strong unions and for intervention to reduce inequalities in income. Thus, young Europeans seem to have clear social concerns and defend the state's regulatory function and collective action in terms of the right to work. Could this be a "protest" reaction in response to the situations of unstable work and social deregulation? It is also curious to see that every country agrees that the Government should take steps to reduce the difference in income and also that workers need to be defended by strong unions, as is shown in figure 2.11.

Religion: the effects of secularisation

Some results in relation to religion deserve a brief note. Figure 2.12 shows the answers respondents gave in the different countries as to whether they belong to a religion or not. The majority said they had no religion in six of the 21 countries analysed, namely in Sweden, United Kingdom, France, Holland, Belgium and the Czech Republic, which is equivalent to about 36% of the population of Europeans surveyed. This illustrates what has been called "secularisation" in Europe and also that this decline in the feeling of affiliation is accompanied by a progressive decrease in religious practices. However, there is a "hard nucleus" of countries where the feeling of belonging to a religion remains very constant, as is the case of southern countries, Poland, and Ireland.

The ESS data also show that women state that they belong to a religion more than men: 67.9% versus 59.3% respectively.³³ Answers to another question intended to determine religious feeling regardless of belonging to a religion or not³⁴ reveal that, on average, women in every age group say they are more religious than men.

32 Through the Multiple Correlations Analysis (MCA) with a further projection of the profiles obtained by analyzing the Clusters, whose input variables include the individual scores in the first two stages of the MCA. See Carvalho (2004) for a more comprehensive description of this analytical procedure (2004).

33 $\chi^2(1) = 296,492; p=0.000$

34 "Regardless of belonging to a particular religion, on a 0 to 10 scale would you say you are...: not at all religious/very religious.

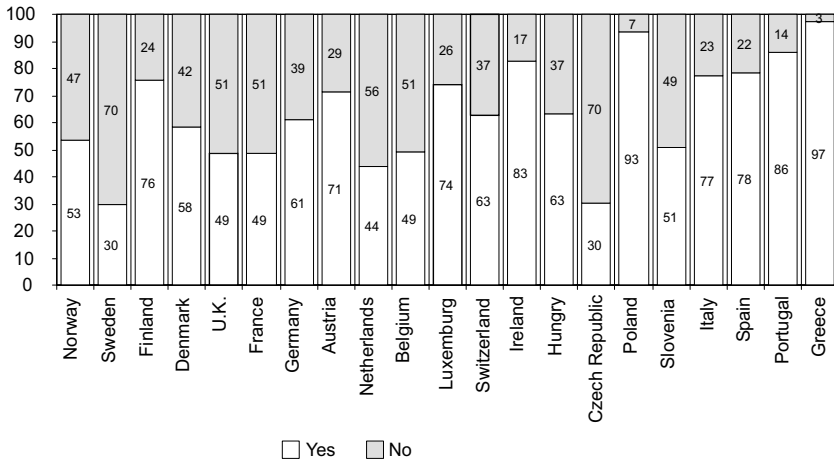


Figure 2.12 Belonging currently to a religion (percentages)

In the three age groups considered — up to 29 years of age, 30 to 59, and over 59 — the figures registered for women are 4.6, 5.0 and 5.8 in contrast with 3.8, 4.1 and 4.7 for men respectively. That is, the only approximation is between older men and younger women (a difference of one decimal). At the same time, it can be said that religious feeling increases with age for both men and women.

Human values: most in favour of self-transcendence

In his book on the subject *Social Values and Representations (Valores e Representações Sociais)* that refers to the genesis of the formation of values, Ferreira de Almeida (1990) defines them as an “expression of organised and lasting systems of preferences” that can be both found and analysed on the social as well as the individual level as systems of incorporated dispositions. In addition to a conceptual and theoretical discussion on the matter, a framework matrix of values is also suggested based on two analytical axes — the social and self-centring axis and the daily and the project axis — that give rise to four major orientations at the valorative level which are, in themselves, indicators of distinct practices and behaviours. This proposal is based on the results of research studying the relationship between classes, age and values, for example.

The typology of human values used in the ESS is more specified although founded on a similar philosophy; it is based on the “Human Values Inventory” proposed by Schwartz (1992) and contemplates 21 indicators

Table 2.4 Schwartz's human values typology

Motivational types	Goals	Type of interests
Hedonism	Pleasure and sensuous gratification for oneself	Single
Achievement	Personal success obtained through demonstrated and socially recognised competence	
Power	Social status and prestige, control over people and resources	
Self direction	Independent thought, action and choice	
Stimulation	Excitement, novelty and challenge	
Conformity	Control of impulses and actions that may violate social norms or prejudice others	Collective
Tradition	Respect, commitment and acceptance of the customs and ideas of the traditional culture and religion	
Benevolence	Enhancing the well-being of those close to you	
Security	Security, harmony and stability of society, relationships and of self	Mixed
Universalism	Tolerance, understanding and protection of well-being of all people and nature	

including 10 types of motivational values that are differentiated from each other by the aims and interests they pursue, as we can see in table 2.4.

Indicators are measured on a six-point scale where respondents are asked to position themselves in the following categories: "exactly like me"; "very like me"; "like me"; "a little like me"; "nothing like me" and "has nothing to do with me". To minimise the social desirability effect that characterises answers to this type of question, the author suggests that the score for each of the 10 types of motivational values is obtained via the arithmetic average of the respective indicators, subtracted from the average of the 21 indicators. That is, it is assumed that the individual position in each value is measured by reference to the individual average of the 21 indicators and should therefore be interpreted as positive, neutral or negative with regard to the whole set.³⁵

By associating the ten types of motivational values (Ramos, 2006) (table 2.4), we can create four scores which reflect four macro-values which

35 The scale of indicators was inverted before the creation of the variable that reflects the 10 basic motivational types so as to simplify the interpretation of results. So the individual score will be positively higher the more the interviewee identifies him/herself with the value and vice-versa.

the author calls of a “higher order”.³⁶ The positioning of the 19 countries and of men and women in relation to these motivational types is now examined (figure 2.13).

Individuals in all countries consider themselves “self-transcendent”³⁷ – women more than men – though the scores for Scandinavian countries and north and central Europe are slightly lower than in the EU enlargement countries and southern Europe. As for “self-promotion”,³⁸ individuals do not identify themselves with this type of value in any country and women less so than men; the respective scores for Scandinavian countries and north and central Europe are slightly higher than those of the EU enlargement countries and southern Europe.

With regard to “conservation”,³⁹ choices in most countries fall in the middle of the scale and are only positive in EU enlargement countries; Poland and the Czech Republic, and south Europe have the highest scores. Differences between men and women are almost imperceptible in most countries though stronger in EU enlargement countries and southern countries where women are more conservative than men. Values related to “receptiveness to change”⁴⁰ show that, just as in the case of “conservation”, individuals keep to the centre of the scale in most countries; in fact, Ireland shows negative results, as do the EU enlargement countries and those in southern Europe. Poland is the “least receptive” and Denmark and Switzerland are the “most receptive”. Men are more receptive to change than women in all countries.

On first analysis, the overall picture for values in most countries seems clear for both men and women. Europeans see themselves as defenders of values that reinforce helping others and loyalty to friends (benevolence), they believe in the importance of equal opportunities, respect for difference, and protecting nature (universalism). On the other hand, most see themselves as giving little importance to wealth and control over others (power), including success, or being greatly admired or recognised by others (accomplishment).

As figure 2.13 shows, the defence of “self-transcendence” and rejection “self-promotion” are clearly majority choices in all countries. On the other hand, “conservation” and “receptiveness to change” are much closer to the centre of the scale – as if people did not want to paint themselves as too extreme. Most countries neither clearly support nor vigorously reject values such as obedience and following the rules (acquiescence), nor modesty, humility or tradition (tradition), or even personal or political security (security).

36 “Higher-order types of values”, in the original.

37 Benevolence+Universalism; Cronbach’s Alpha = 0.71

38 Power+Accomplishment; Cronbach’s Alpha = 0.73

39 Conformism+Security+Tradition; Cronbach’s Alpha = 0.74

40 Self-determination+Stimulation+Hedonism; Cronbach’s Alpha = 0.76

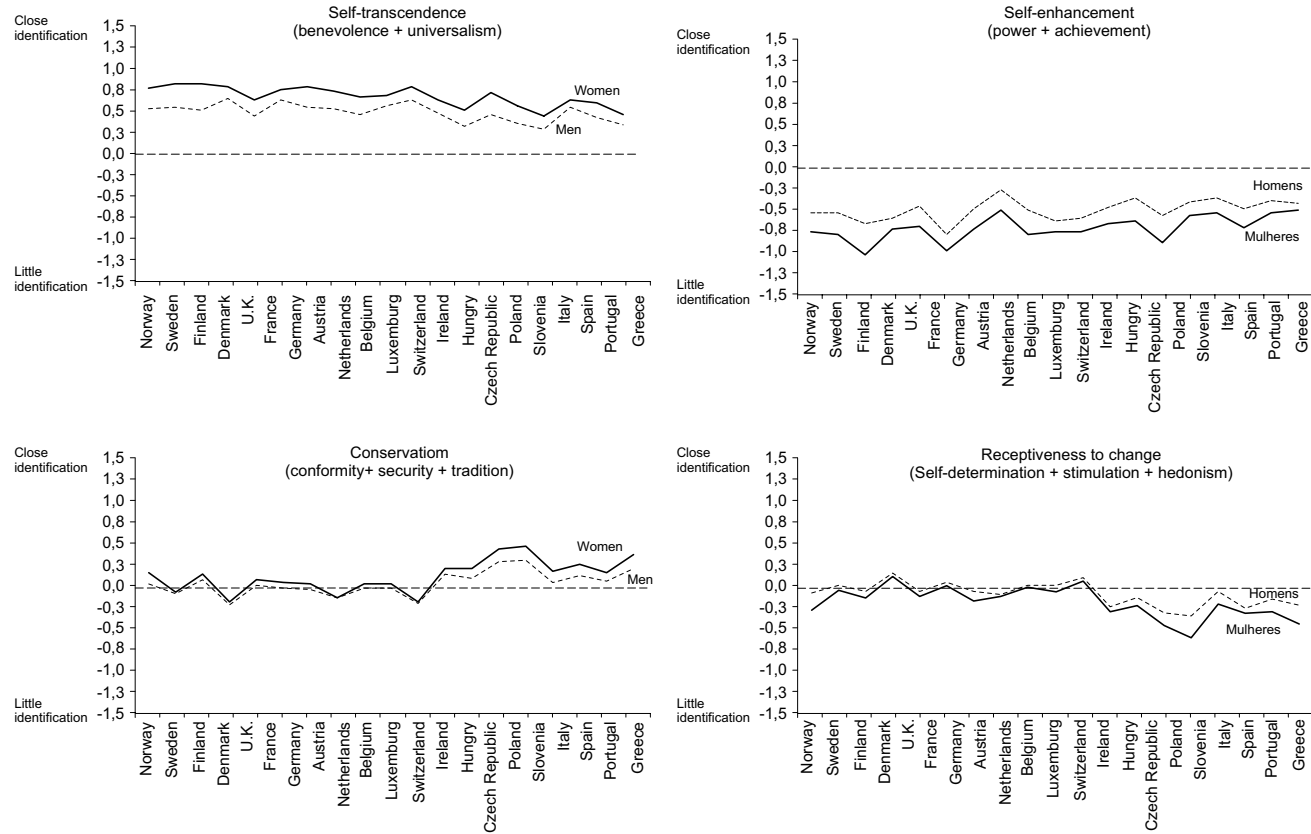


Figure 2.13 Europeans' human values by country and sex

^a Explained variance by sex: $F(1,28804)=972.789$; $p=0.000$; $Eta^2=0.033$. Explained variance by country: $F(18,28796)=51.378$; $p=0.000$; $Eta^2=0.031$.
^b Explained variance by sex: $F(1,28804)=775.28$; $p=0.000$; $Eta^2=0.026$; Explained variance by country: $F(18,28796)=66.075$; $p=0.000$; $Eta^2=0.040$.
^c Explained variance by sex: $F(1,28804)=286.365$; $p=0.000$; $Eta^2=0.010$; Explained variance by country: $F(18,28796)=98.093$; $p=0.000$; $Eta^2=0.058$.
^d Explained variance by sex: $F(1,28804)=300.054$; $p=0.000$; $Eta^2=0.010$; Explained variance by country: $F(18,28796)=103.877$; $p=0.000$; $Eta^2=0.061$.

Equally, most do not clearly reject nor defend values and attitudes that emphasise immediate pleasure (hedonism), creativity and independence (self-determination), or novelty, risk, adventure and challenge (stimulation).

With regard to “conservation” and “receptiveness to change”, it is also worth adding that although the choices are very close to the centre of the scale in most countries, positions become clearer in Ireland, in the EU enlargement countries and in southern countries. The latter countries are more conservative and therefore, logically, less open to change, as figure 2.13 illustrates well. These small variations are coherent with each other and with other ESS data already analysed for the said countries, and confirm the credibility of these results.

As for the differences between men and women,⁴¹ it is interesting to note that although there were no great disparities, the relative distinctions are in line with predictable expectations. Women state that they worry about others and defend universal human rights more so than men and are also further from any affirmation on success and power. This undoubtedly is a reflection of their daily lives in which many women have to divide their time precisely between caring for others, i.e. family responsibilities, and their professional lives. These affirmations of greater benevolence, greater universalism and being more distanced from power-related concerns can therefore be said to correspond well to stereotypes. But what about the overall regular and unequivocal affirmation in all countries — by men and women — of a marked and positive adherence to “self-transcendence” values and a clear withdrawal from those regarding power and accomplishment, the so-called “self-promotion” values?

Are Europeans closer to female rather than male stereotypes in terms of values? Cynics might explain this trend by saying it is the right, socially-desirable answer. But if that is the case, is it indifferent that “self-transcendence” values are defined as desirable in all countries? Could this very dominant affirmation of interest in others and for equal opportunities work in a compensatory manner? And why is it that social desirability is the same yet again for men and women, despite the relative differences?

The answer to these questions requires a more in-depth analysis that is beyond the scope of this paper. Nevertheless, it is important to highlight the great convergence of personal choices between these results and those analysed above when it comes to ranking what is important in each person’s life. In most countries, men and women choose first family, then friends and leisure, followed by work in a perfectly coincident hierarchy, thus revealing that they give as much importance to affection, and social and relationship values. That is, there is also a kind of “self-transcendence”.

41 The structural layout of the four values (analysed via the multidimensional scaling /PROXCAL procedure available in the SPSS) is similar for men and women.

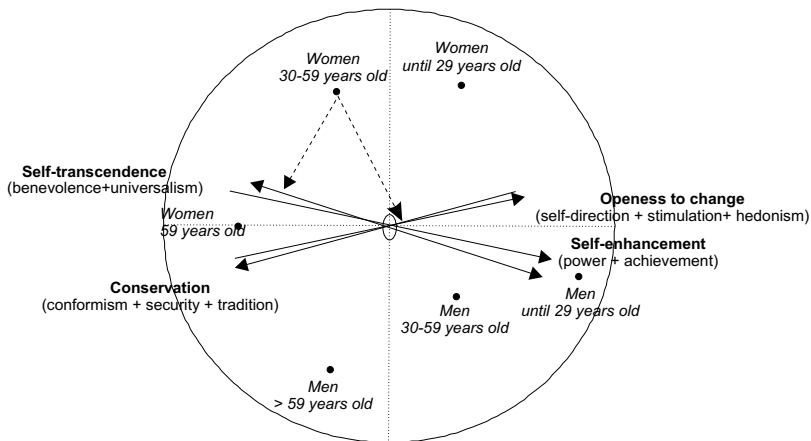


Figure 2.14 Europeans' human values by sex and age

Note: The position of the categories, in relation with values, is obtained by a drawing a perpendicular to each vector, imagining the position of the category in the respective intersection area. See, for instance, women 30-59 years old are much more close to self-transcendence and distant from conservation. The closest to the arrow the higher is the agreement with the value.

SPSS/CatPCA. Cronbach Alpha = 0.999; Explained variance=99.56%

Anyhow, once more there is the need here to exclude dichotomic views that insist on emphasising the gender differences. Figure 2.14, which introduces age groups into the analysis, shows that intra-gender differences are more relevant than those of inter-gender as has been stressed above; this clearly shows that an analysis focussing only on the differences between men and women conceals changes in the structure of values that must not be ignored.

Indeed, figure 2.14 shows that values such as “receptiveness to change” to which women seemed to be more distant and men relatively close, now seem to be associated with a specific group of younger women (up to 29 years of age); on the other hand, “being conservative”, to which women generally said they were closer, is now more associated with older men (> 59 years).

In turn, “self-transcendence”, which generally had more female support, is now also associated with men and becomes the inverse of “self-promotion”. The first case is more associated with women aged between 30 and 59 years, and the second more associated with men in the same age group.

On examining the effect of other variables, it is concluded that education is significantly correlated ($p=0.000$), though the correlation is very low with “self-transcendence”, ($r=0.078$) and with “self-promotion” ($r=0.048$) and low with “receptiveness to change” ($r=0.235$) and “being conservative” ($r=-0.316$);

the association of conservative to low education is therefore the only correlation with a negative direction.

As stated above, education is of great importance today in instilling values and it has very weak correlations⁴² with “self-transcendence” ($r=0.078$) and “self-enhancement” ($r=0.048$), and weak correlations with “receptiveness to change” ($r=0.235$) and “being conservative” ($r=-0.316$); hence, the association between being conservative and low education is the only correlation with a negative direction.

Education: Portugal’s specificity

In the in-depth analysis of the ESS data conducted by members of the CIES team working with the ESS, education reveals itself as one of the variables that best explains the differences found in some of the dimensions addressed. Clearly, this is nothing new for either experts in the field or, we daresay, the general public. Indeed, school is the ideal foundation for social and economic development. The discussion on the duality of economic growth versus development has always been a false problem. Knowing whether it is growth that precedes development or development that precedes growth is of little importance as they are closely linked: it is impossible to speak of development without growth, and it is equally meaningless to seek growth without development. Though there are of course plenty of examples of the latter, it is well known that they are false and always hazardous examples. Essentially, there are two contrasting positions: the virtuous circle embodied by the growth/development binomial, and the vicious circle of underdevelopment without growth. Without a shadow of doubt, education is at the base of the virtuous circle both due to its capacity to provide theory and practical skills and the teaching of citizenship which it is required to promote.

The ESS results for Portugal are not good in this field. As shown in figure 2.15, the scenario is not optimistic despite the changes in the last 30 years when there was an exponential growth in the school population, especially in higher education.⁴³

Only Swiss, Hungarian, Slovenian, Polish and southern European women are below the European average (11.8 years), with Portugal holding the sad

42 ($p=0.000$).

43 With regard to Portugal in particular, everything seems to suggest that a low level of education is largely responsible for our endemic delay and, if this is not corrected soon, our difficulties will become worse in the near future. Even in the younger age group (aged 15-29 years) Portugal is still below the European average, whereas the countries of the most recent EU enlargement that participated in this study — Hungary, Czech Republic, Poland and Slovenia — have already overtaken that average. If citizens are not well prepared in terms of literacy, it will be impossible to withstand a “technological shock”.

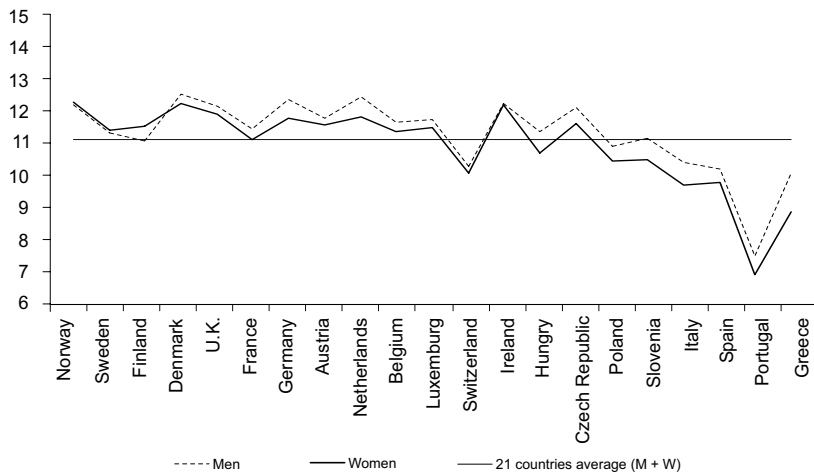


Figure 2.15 Years of completed schooling by country and sex (averages)

Variance by sex: $F(1.36252)=159.091$, $p=0.000$, $Eta^2=0.004$. Variance by country: $F(20.36247)=163.582$, $p=0.000$, $Eta^2=0.083$.

Table 2.5 Years of completed schooling in Portugal and in Europe (averages)

Age group	21 countries	Portugal	Difference
60 years or over	10.7	5.2	- 5.5
30 to 59 years	12.9	8.7	- 4.2
15 to 29 years	12.7	10.5	- 2.2
Total	11.8	7.4	- 4.4

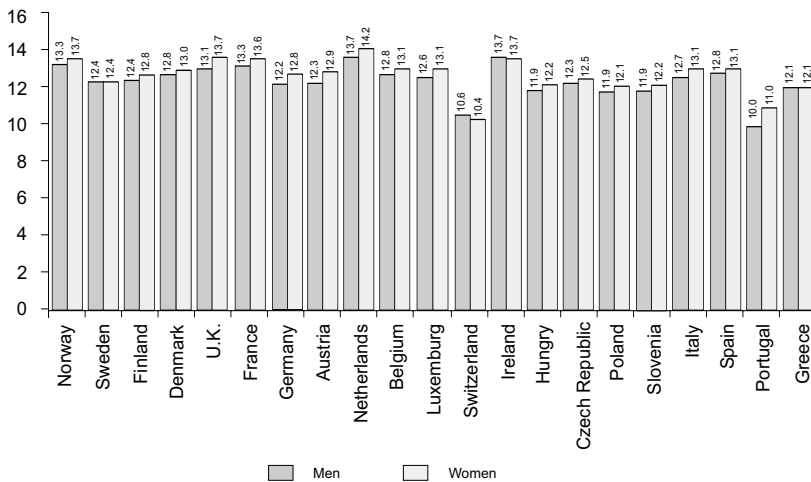
record of 7.4 years. It should also be noted that differences between men and women in the general population are not very expressive and the average figures are below those of men except in Norway, Sweden and Finland.

The Portuguese scenario does not seem so bleak when considering age groups where the differences decline. In relation to the average, Portugal goes from -5.5 years among the older generation to -2.2 years among the younger generation (table 2.5).

It should be noted, however, that it is women who most contribute towards Portugal's convergence with the European average. The differential is favourable to men in the 30-59, and over 60 age groups but it is now favourable to women in the 15-29 age group with -1.7 years as opposed to -2.7 years for men. This confirms what has long been known: the increasing feminisation of the higher levels of education.

Table 2.6 Completed years of schooling in Portugal and in Europe (averages)

Age group	21 countries	Portugal			Difference between Portugal and the 21-country average	
	(M+W)	(M+W)	Men	Women	Men	Women
60 years or over	10.7	5.2	5.9	4.6	-4.8	-6.1
30-59 years	12.9	8.7	8.8	8.6	-4.1	-4.3
15-29 years	12.7	10.5	10.0	11.0	-2.7	-1.7
Total	11.8	7.4	7.7	7.1	-4.1	4.7

**Figure 2.16** Completed years of schooling by country and sex in the 15 to 29 year age group (averages)

But has this feminisation in higher education only taken place in Portugal? The following figure shows that that is not so. Women are better educated than men in the younger age group (aged 15 to 29 years) in 15 of the 21 countries analysed.

It can therefore be concluded that the feminisation of the higher levels of education is not circumstantial but structural. Indeed, when comparing the population as a whole (figure 2.16), we go from 3 cases out of 21 where women were better educated than men (Norway, Sweden and Finland), to 15 countries in the 15 to 29 age group.

Conclusion

Based on the analysis of the European values and attitudes it is not difficult to conclude that there are more similarities than differences between men and women. Overall, convergences are visible in most answers, especially in relation to what is considered to be important in life, social and political trust, citizenship values and the state's role in the economy. Though there were sometimes minor differences in the position taken by each of the sexes in each field, they were never significant.

The differences only assume greater significance in three areas: in the distancing from politics, value given to religion, and some domains of human values.

Generally speaking, European women remain more distanced from politics and give more value to the role played by religion in their lives than men. There are also some differences with regard to trans-situational values. Women tend to be more universalist, more benevolent and more conformist than men. That is, according to Schwartz's typology, they render a little more importance to collective or mixed values, are more "self-transcendent" and "conservative" than men. Yet, even so, the differences do not mean that men and women are frontally opposed: they are reflected, rather, in variations of emphasis. Following this result, it will be very difficult to maintain that men are the sons of Mars and women the daughters of Venus.

Furthermore, what should be stressed in these conclusions as regards values — in total contradiction of the stereotypes — is that men, just like women, evaluate attitudes of universalism and benevolence positively and those of power, self-promotion and competition negatively. In other words, ultimately, in contrast to what male socialisation in peer — groups and the family may be — which still emphasize the behavioural differences between the "real" man and woman — when the two sexes are asked to give a completely anonymous opinion, they transmit the image that they tend to stress the same attitudes and value configurations as positive.

Although we recognise the so-called "social desirability" effect in these statements, the fact that men and women want to give themselves an image which is identical, does not mean that more essentialist positions are not questioned or that they attribute direct, unequivocal and lasting biological differences in their perception and behaviours. Other studies with more localised observations (Prince-Gibson and Schwartz, 1998) have already concluded that there is a proximity between the sexes in terms of attitudes and values.

Does this lack of major differences between the sexes on values and attitudes mean that men and women have similar life experiences and that there is no point in emphasising the need for gender equality after all? On the contrary. These questions can be best be answered by going back to what was said on the points which diverged most.

A dimension with a greater distance between women and men is the degree of detachment from politics, measured according to their overall interest and their availability to take part. There are two main reasons for this difference. On the one hand, we know that most European women have jobs and combine their occupation with family responsibilities, which are implicitly and explicitly assigned to them as their main responsibility, regardless of — whether they work outside the home or not. Accordingly, they have little time for other activities, a fact that surveys on the use of time plainly demonstrate. The obvious conclusion is that objective conditions very scarcely favour female availability for politics, or even interest in it.

Moreover, the way in which the political sphere works tends to exclude women (Viegas and Faria, 2001); firstly, not many women work in this field and it is also conducted in specific ways — irregular timetables, implicit rules and norms better for those with no other responsibilities, such as a family. Thus we have a dual effect of exclusion and self-exclusion. These mechanisms are generated in the everyday of our social life and they have powerful symbolic effects; they make it difficult for women to participate and dictate the need for special measures — like quotas — so as to contradict what is being acknowledged as the serious democratic deficit of the lack of female participation in politics.

However, it is important to underline that the ESS data clearly show that although European women say they are less available and less interested in politics, this does not stop them from making specific and revealing choices when asked for an opinion. For example, it is very revealing that women in most countries are stronger supporters of left-wing politics in which issues related to gender equality and policies that may directly affect women's daily life are the focus of greater attention. So as we saw, with the exception of southern Europe, women in most European countries assume a position to the left of men. A similar effect can be seen when women, especially in the younger age groups, emphasize the importance of governments combating inequalities of income and intervening in the economy, or clearly defend the need for strong trade unions. Inglehart and Norris (2003) also noted the trend that women in most countries assumed positions usually associated with left-wing parties.

Indeed, a greater distancing from politics does not imply an inability to pass judgment or to choose. This therefore confirms that rather than looking for some aversion to anything political in the "female nature", it is the social processes underlying the phenomena of women's participation in politics that need to be analysed in order to glean a greater understanding. It is these processes that encourage exclusion, just as they feed and reproduce inequality. Moreover, an analysis of the conditions and circumstances in which most women live, as well as their strategic reproductive role, will certainly help explain why they systematically give more importance to religion than men.

However, this requires a detailed and specific analysis beyond the scope of this paper.

Going back to the more overall results of the ESS, the differences in the levels of education reached by men and women is to be noted. Like political positioning, the conclusion can also be reached here that a traditional gender gap has changed to a modern gender gap. Indeed, whereas women in the past were less educated than men, today it is clear that younger European women on average have more years of schooling than their male counterparts.

To finalise this transverse view of the ESS data on gender differences, it is worth underlining that this exercise reveals the need to discard stereotyped positions. The most flagrant conclusion is the convergence of the two sexes on a vast range of attitudes, opinions and values: it challenges attempts to essentialise gender differences. But differences were also found that serve to combat the illusion of a similarity that does not otherwise correspond to any daily experience. The differences of position that were identified in a localized form can be related back, among other factors, to social processes, circumstances in life and the inequalities and real discrepancies that still persist between men and women.

It is also true that we are dealing with very generic positions and global data here, and more detailed analyses and other methods of approach are most certainly needed to shed more light on each of these positions and situations.

However, the study was a good way of breaking down current visions which often become an ideological curtain that makes reality difficult to understand. Topics related to the difference and equality between men and women certainly tend to cause paradoxical discourses nowadays. Ulrich Beck underlines the persistent inequalities as well as the changes that have taken place over the past few years, and draws attention to these paradoxes saying that the continuous inequalities become even more evident in terms of consciousness precisely because there have been significant developments in the field of equality between men and women (Beck, 1992).⁴⁴

In fact, the changes in the last hundred years and the protagonism of women have also demonstrated the systematic destruction of conceptual barriers about the consequences of the real biological differences between men and women. This process is far from finished.

44 After marking the major gains in terms of equality between the sexes with regard to ideas, and also the strong resistance to real change, he says: "This has seemingly the paradoxical effect that the increased equality brings the continuous and intensifying inequalities even more clearly into consciousness" (Beck, 1992: 103). This subject is examined in even more detail in a book recently co-written with Elizabeth Beck-Gernsheim (Beck and Beck-Gernsheim, 2002).

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Work and family: what quality of life? An exploratory analysis of the services sector

Maria das Dores Guerreiro and Eduardo Alexandre Rodrigues

Introduction

This chapter presents an extensive and exploratory study of some factors associated to different levels of work satisfaction and subjective well-being in a sample of Portuguese workers from the service sector. Special focus is given in the analysis to the work domain, highlighting in particular the existing relations between different patterns of articulating work and family and individual levels of well-being as evaluated by the workers in the study. The results obtained are presented in two main stages; firstly, an analysis will be made of a set of variables related to working conditions and forms of professional insertion, addressing the various ways in which these differentiation factors are associated to the evaluations made of work and well-being. Then, the way in which this same set of variables affects the individuals' evaluations of the work-family relationship will come under analysis; again, the main aim of this is to shed light on the factors in question when examining levels of work satisfaction and well-being.

One of the main objectives of this study involves an explanatory analysis that tests some indicators of the quality of work, satisfaction with the work-family relation and well-being and the proposal of some provisional hypotheses. A straightforward analysis is used to identify relations between variables that can act as the first indicators of important patterns from the sociological viewpoint. Subsequent analyses will allow more complex and sustained advances to be made towards the various research tracks identified here.

This work comes within the scope of an European project, *Quality of Life in a Changing Europe*, the overall aim of which was to map the levels and profiles of well-being and quality of life of European workers in the service sector. One dimension of the project involved the use of an international and predominantly comparative approach to conduct a questionnaire enquiry in

each country in companies from the service sector: telecommunications, retail, finance and health.¹ Indeed, this activity sector has become central to the organisation of contemporary societies, not just in broad configuration terms, but also in the determining of the life opportunities of individuals, their working contexts and the way in which they move between work and family life (Cardoso *et al.*, 2005). Hence, preference was given to a perspective that centred on these workers, notably by the collection of empirical data that allowed comparative analyses to be made of highly qualified segments.

As already referred, in this first exploratory exercise we will present some of the main patterns of satisfaction with work and well-being in accordance with the answers obtained from the questionnaires administered in Portugal.

To what extent are the perceptions and evaluations of satisfaction and general well-being and levels of quality of work associated? How far are various key factors in the professional domain linked to subjective individuals' assessments of their quality of life? On the other hand, how do these representations and appreciations vary when we look at patterns of articulating work and family? In general terms, what can be said about the inter-relations between the quality of work and the quality of work-family relations on one hand and satisfaction with work and well-being on the other?

These were some of the questions guiding the preliminary analysis of the quantitative data presented in this chapter. The structure of the text in both sections of the empirical analysis is as follows: a brief overview of the main analytical coordinates is followed by an explanation of the various indicators used, notably: quality of work (control and inter-relational support), satisfaction with work, satisfaction with work-family relations, negative interference of work in the family and the family in work and, finally, subjective well-being. The description and interpretation of the empirical elements includes the identification of some associations considered to be relevant, the discussion of some hypotheses and research tracks opened on the data presented.

Quality of life and well-being: brief theoretical background

Research in the social sciences on the quality of life and well-being has flourished in recent decades, linked to the development of attempts to go beyond more restricted approaches of individuals' material living conditions. These approaches have tended to focus primarily, and sometimes exclusively, on economic aspects and on the various forms of unequal access to material

1 In Portugal, 1,373 questionnaires were administered to a randomly selected sample of workers in the various activity sectors.

resources. Though recognised as fundamental, this approach is considered insufficient to explain the complexity of factors that affects everyday lives and other analytical formats have therefore been developed so as to introduce key dimensions in the sociological approaches of the framing of individuals' lives, such as policies and welfare measures, levels of social integrations and exercising citizenship, the differentiated insertions and experiences in work and family, the different patterns of articulating these two central domains and the various forms of consumption and cultural practices (Diener, 2006; Diener and Suh, 1997; Phillips, 2006; Rapley, 2003; Sirgy *et al.*, 2006; Veenhoven, 2000).

The development of the sociological issue of the quality of life is also partly associated with what in some instances has been designated a change in the structuring paradigm of social values. Accordingly, the "materialist" values in which economic security and material survival predominate would become progressively less important in relation to "post-materialist" values where self-expression and the more intangible aspects of people's lives are highlighted (Inglehart, 1990; 1997). In this context, a broad notion like quality of life gained greater visibility and became an urgent matter in the more developed societies of Europe and also the United States, precisely where mere economic survival was supposedly no longer the main focus of people's lives insofar as this would have been assured for the overwhelming majority of the population.²

One of the main lines of analysis of quality of life, often known as the "social indicators" approach, began by devoting special attention to social formations of appreciable dimension such as regions or countries. This perspective contributed to the development of a comprehensive and extremely important battery of indicators of objective living conditions (average life expectancy, literacy levels, infant mortality, etc.) distinct from those intended to evaluate the unequal distribution of economic resources (Diener and Suh, 1997). These various measures not only provided a deeper and fuller insight into the differentiated societal profiles of well-being and welfare, but they also assured a broader understanding of the complexity of the quality of life notion.

In another relatively recent but important line of research that can be articulated with the more general topic of quality of life, special attention is focused on the cultural and subjective dimensions of well-being and satisfaction (Campbell, Converse and Rodgers, 1976; Diener, 1994; Diener and Suh, 1997; Diener *et al.*, 1999; Veenhoven, 1996). The central notion of this approach is that the evaluation of material living conditions and the consideration of

2 For some years quality of life in its various ramifications has been integrated into the policies and recommendations of the European Union itself (Alber, Fahey and Saraceno, 2008; European Commission, 2001).

“objective” variables are essential but are only revealing and acquire deeper significance if they integrate other dimensions of life in the analyses as well as the perceptions and subjective evaluations supplied by the agents themselves. In the course of previous research on the quality of life, some “paradoxes of satisfaction” were identified, in other words, the very favourable material living conditions and the very high levels of owning economic resources often failed to correspond to expected levels i.e. also high, of satisfaction with life and subjective well-being. On the other hand, there was no linear expression of certain living conditions that were seen to be unfavourable in negative appraisals and low levels of well-being. That is, whilst not questioning the existence of a strong relation between the differentiated possession of material resources and people’s quality of life which have already been extensively studied and demonstrated, here we are essentially recognising the existence of other key dimensions of individual existence which also structure subjectivities: work, family, the paths circulating between these two domains, and socialising for example. Other variables such as cultural values and expectations, the individual and family strategies developed in response to everyday needs, and the social comparison processes and subjective evaluation were systematically integrated into the sociological analyses and served to progressively deepen the issue of the quality of life. Various conceptualisations and useful indicators have been developed in this scope: scales of satisfaction with different domains (family life, work, health, leisure, etc.), with the aim of capturing cognitive appreciations and emotional experiences, and multidimensional indices of well-being and quality of life for example (Diener, 2006; Diener and Diener, 1996; Diener *et al.*, 1999; Myers and Diener, 1995).

As can be seen from these brief considerations, the quality of life issue is a comprehensive “theoretical umbrella” that encompasses a varied range of perspectives. This gives rise to considerable diversity in the analytical proposals that are made for methodological strategies and measurement choices (Phillips, 2006; Rapley, 2003; Sirgy *et al.*, 2006; Veenhoven, 2000). It should also be noted that, although some sound empirical regularities have already been identified, some of the main research questions in the field of quality of life remain unanswered and have been the target of various attempts of find solutions. Notwithstanding, there have been some fruitful attempts at a synthesis; notably, the emphasis has been placed on the simultaneous and articulated use of both “objective” and more “subjective” indicators.

Erik Allardt (1976 and 1993), for example, developed a conceptualisation of the quality of life which includes three dimensions: “having” (referring to material resources and living conditions), “loving” (relating to family and affective relations) and “being” (that refers to questions of social integration and feelings of belonging and collective confidence). This proposal is evolved in a multidimensional analytical research project on the satisfaction

and well-being that have been used in research studies in the scope of the European Union (Alber, Fahey and Saraceno, 2008; Böhnke, 2005; Fahey *et al.*, 2004; Kapitány, Kovacs and Krieger, 2005; Saraceno, Olagnero e Torrioni, 2005; Wallace, Pichler and Hayes, 2007). The “having” dimension has been measured using indicators such as available income, housing characteristics, working conditions, state of health, levels of schooling, etc.; the “loving” dimension has been made operational by measuring the frequency and styles of contact with relatives and friends, for example; the “being” dimension implies the use of indicators such as the kind of involvement in citizenship or leisure activities, the opportunities to do meaningful and rewarding work, the level of freedom and potential control over various aspects and domains of life and the available opportunities to participate in decision making processes at various levels. The author underlines the need for the articulated use of objective and subjective indicators in each of the three dimensions of analysis mentioned above so that a full panorama of the patterns of well-being and quality of life can be depicted (Allardt, 1993).

Other authors have worked in the scope of the so-called perspective of the “domains of life” which has proved particularly fruitful in relation to the analysis of the articulations between work, family and quality of life. In accordance with this approach, the evaluations of satisfaction and subjective well-being are dynamic and vary in line with the plurality of experiences that take place in a diversified and complex set of life spheres that the individuals encounter on a daily basis, such as family, work, socialising, leisure etc. (Rojas, 2006; Sirgy *et al.*, 2001, 2006; Sirgy and Michalos, 2002). The salience of each of these domains in determining the quality of life also varies; various hierarchical articulations can be proposed to explain the complexity of factors that influence the levels of well-being, the various stages of analytical clustering. These analyses also confer privileged space to a set of inter-related socio-psychological processes resulting from the insertions of individuals in the various spheres: “spillover” processes in which experiences and evaluations in one specific domain affect and influence those that take place in another; segmentation processes that relate to the effort to separate or define the boundaries between domains of life; and compensation processes that recognise the efforts taken to balance diverse emotions, experiences and evaluations — and sometimes the contrary — that take place in the different domains, notably through the choice of investment/de-investment of time and other resources (Sirgy *et al.*, 2001; Staines, 1980).

In the literature on subjective well-being, other relevant socio-psychological process such as adaptation/adjustment and social comparison are also discussed (Diener, 1994; Diener and Suh, 1997; Diener *et al.*, 1999; Veenhoven, 1996). The former terms refer to the dynamic articulation that usually exists between material living conditions and the subjective evaluations thereof — which tend to be adjusted with varying timings and levels of inertia to what is

perceived as being “reasonable” to want and expect in specific circumstances. Social comparison processes should also be considered when taking into account the answers given by people questioned about their quality of life and well-being: the distance or proximity of each situation in relation to the conditions that positive or negative reference groups are understood to have tend to work as the important aspect for evaluating life (Merton, 1968). Experiences and past events, as well as objectives and culturally established circumstances such as ideal standards of satisfaction and well-being also come in to the complex definition of the answers given by people when urged to talk about their quality of life in many domains.

In short, it can be said that the issue of quality of life provides sufficient scope to develop multidimensional analyses that can go beyond some approaches based on a limited number of indicators related to material conditions (e.g. levels of individual income or GDP per capita). This wider ranging perspective has been developing rapidly in recent years and already involves a battery of research questions and empirical indicators. These findings are inseparable from another that underlines the complex and multidimensional nature of the notion of quality of life: different analytical levels and various research emphases will help delimit the choice of approach at each stage, the research methods and the empirical measures. Material conditions, housing, health, family and work are fundamental domains when determining people’s well-being and quality of life (Alber, Fahey and Saraceno, 2008; Phillips, 2006; Rapley, 2003); notwithstanding, many sociological questions remain open with regard the social patterns of articulation between the various domains and to the way they structure not only the concrete circumstances of each individual but also the perceptions they have of these circumstances.

Clearly, this work will focus only on one selected aspect of the issue of quality of life. The analytical focus will be placed on the identification and questioning of some key factors in the domains of work and work-family articulation that are associated to the different levels of well-being stated by the individuals.

Following this brief summary of some of the basic coordinates of the studies that have been conducted on this matter, the concepts and indicators used herein must also be specified. This is done at the start of the next two sections so as to provide the framework for the subsequent discussion on the empirical elements selected for presentation.

Quality of work and well-being

In recent decades, a series of extensive changes have been witnessed in the world of work linked to the broader dynamics of globalisation, economic restructuring, flexibilisation and the increase in precarious and insecure jobs, the growing use of information and communication technologies and the

development of new management models and work organisation methods (Beck, 2000; Cooper and Burke, 2002; Guerreiro *et al.*, 2004, Kóvacs, 2002). The generalised acceptance of the importance of these changes can be associated to an increased interest in a set of questions and problems linked to the issue of the quality of life, notably with regard the impact these change factors have on levels of satisfaction with work and also their more general effects on the level of well-being and the quality of life of European citizens (Alber, 2008; Wallace, Pichler and Hayes, 2007; Wallace and Pichler, 2008).

However, these far-reaching changes in the world of work do not prevent this remaining as one of the central domains of the structuring of people's lives not only in terms of the use and organisation of time but also as a means of obtaining economic resources and identity building. Hence, it is to be expected that the work sphere is also of great importance in determining well-being and quality of life (Alber, Fahey and Saraceno, 2008; Diener and Suh, 1997; Fahey *et al.*, 2004). The effective and relative impact of the various factors that are linked with people's concrete insertion in the world of work and in companies and organisations has been the subject of lively debate. Therefore, in the various studies conducted recently on the quality of work and respective articulations with the broader issue of the quality of life, many questions remain unanswered: theoretical and methodological questions, indicators used, techniques and instruments for empirical collection (Wallace, Pichler and Hayes, 2007; Wallace and Pichler, 2008). Obviously, this does not mean that the various sociological studies that have focused on this issue have not already contributed to identifying some coordinates that are important points of departure for any work analysing the existing articulation between the variables related with insertion at work and the quality of work and between these and levels of well-being. Before beginning our analysis of some preliminary empirical data, it is therefore fruitful to provide some of these elements for contextualisation purposes.

First and foremost, the working situation emerges as a strong differentiating variable, notably when we speak of unemployment. Clearly, this not only occurs due to access to material resources that the job provides but also because of its centrality in the identity building and social integration processes of men and women (Caetano, Tavares and Reis, 2003; Kovács, 2002; Torres, 2004). Thus, some research has demonstrated that the levels of satisfaction with life and well-being among the unemployed are lower than among those with a job (Fahey *et al.*, 2004; Gallie and Russel, 1998; Kapitány, Kovacs and Krieger, 2005; Ouweneel, 2002).

The aim of this study, however, is to look firstly at the factors related to insertion in work that are associated to the differentiated levels of quality and satisfaction with it, and then to the patterns formed by the articulation between the quality/qualities of work and quality of life. Thus, we will always be speaking of people who were employed at the time of the study. There are

many factors which have a strong impact on the quality of work: wages, physical and environmental conditions, security, autonomy, creativity, organisational culture and forms of integration are important variables in the determination of people's levels of satisfaction with work, although there is great diversity in the way they articulate with each other in each concrete case (Wallace, Pichler and Hayes, 2007; Wallace and Pichler, 2008). Other domains with an impact on the labour sphere, such as the different Welfare State systems also contribute to structuring the opportunities and constraints which people come up against on a daily basis. In other words, in both the work domain and in the other domains with which it articulates there is a wide range of factors that are relevant to the explanation of the differentiated patterns of quality of work and its impacts on the levels of well-being: norms of insertion in a job, working conditions, forms of social integrations and other economic, cultural and also political variables (Kóvacs, 2002).

The strong inter-relations between the quality of work and the levels of well-being were first demonstrated a very long time ago and this has led to questions being raised about the different variable components of this "quality" (Campbell, Converse and Rodgers, 1976; Kapitány, Kovacs and Krieger, 2005). From the outset, factors such as the workers' remuneration levels, number of working hours, higher or lower safety standards, greater or less precariousness are fundamental to the explanation of job satisfaction; nevertheless, the notion of quality has a broader scope and other relevant dimensions must be included in the analysis and people's subjective appreciations about their circumstances play a more marked role. The opportunity to do the job more creatively and autonomously, forms of harmonious integration in the work place in terms of interpersonal relations with colleagues and superiors, as well as positive appraisals of the interest of the work done are also found to be general tendencies associated with the higher levels of quality of work (Alber, 2008; Caetano, Tavares and Reis, 2003; Clark, 2005; Wallace and Pichler, 2008). More recently, the ambivalent impacts that the increasingly conspicuous flexible forms of work can have on how people experience and evaluate this central domain of their lives have also been explored.

The spillover theories also draw attention to the possible impacts that the day to day experiences in the world of work can have on the quality of life generally (Sirgy *et al.*, 2001): the (positive and negative) patterns of satisfaction and well-being associated to a certain central "sphere" can affect or "spill over" into other such as the family. In this context, the importance played by the mechanisms people find to conciliate work and family in the determination of the quality of work and the quality of life becomes very apparent (Fahey *et al.*, 2004; Kapitány *et al.*, 2005).

Nevertheless, the analysis of the way in which the patterns of conciliating work and family are articulated with different levels of subjective well-being is likely to be made partially autonomous; focus will be given to this

analysis later in the chapter. Meanwhile, with the aim of the abovementioned exploratory approaches, the factors associated to some selected dimensions of the quality of work and job satisfaction will be highlighted; some provisional considerations will also be made about how quality of work and the appraisals of well-being are articulated.

Indicators

As we have seen, the general question of the quality of life is diverse and has led to a considerable number of theoretical approaches and proposals to make it operational. On the other hand, it is found to be a multidimensional concept that can equally be explored from a range of objectives. The European Commission for example refers to 31 indicators that may contribute to its measurement through a set of dimensions (Kapitány *et al.*, 2005: formal skills, forms of lifelong learning, career opportunities, gender equality, health and working conditions, flexibility and security, access to and inclusion in the labour market, methods of organising tasks, social dialog and the involvement of the workers in decision making processes, policies and opportunities to conciliate work and family, etc.

Recently, Green (2006) called attention to the importance of the characteristics of the job that boost workers' skills and encourage their well-being; this proposal is linked to Amartya Sen's capability approach (1993). Adjusted remuneration, feelings of security and control over the work (tasks, pace, etc) and positive integration, in support terms, in the network of inter-relations with colleagues and superiors, are seen as important factors; they allow people to take advantage of their circumstances and improve them and also to reach their goals and fulfil their personal expectations in the various areas of life (Green, 2006).

In light of the limited scope of this paper, a brief analysis will be made of a set of indicators of the quality of work; this also aims to test some of the composite measures with a view to pursuing the analysis in the following stages of more detailed research. Accordingly, autonomy and creativity, which can be understood as two dimensions of control over work (Karasek and Theorell, 1990), were taken into account, as were integration in support networks formed by colleagues and superiors which refers to the important relational dimensions of the forming of the work contexts (Karasek and Theorell, 1990). Job satisfaction is also an indicator of the more far reaching notion of the quality of work, insofar as it puts the various ways in which the people themselves experience and evaluate their work into perspective. Generally speaking, indicators such as those used that essentially translate the subjective perceptions of the agents about their work in conjunction with other more objective indicators allow a better picture to be drawn of the framework of the quality of work and quality of life (Sirgy *et al.*, 2001).

Thus, three indicators were mobilised to measure some aspects of quality of life: control over work, inter-relational support and satisfaction. Yet, again, it should be said that on selecting these three analytical dimensions, other equally important factors in the delineation of the quality of people's work will be left aside. However, it is beneficial to look at how these dimensions are articulated with other factors related to the sphere of work, as these articulations are relevant when determining the individual experiences and appraisals that are of interest here: working hours, flexible practices in the organisation of work, (in)security and creativity, for example (Clark, 2005; Kapitány *et al.*, 2005; Sirgy *et al.*, 2001; Sparks, Faragher and Cooper, 2001; Wallace and Pichler, 2008); but there are also others such as whether or not there is a feeling of solidarity between colleagues and superiors and the degree of control the workers have over their own tasks and undertakings (Allen, 2001; Clark, 2005; Danna and Griffin, 1999). After some reflections on the most relevant effects of these different factors on the quality of work, we move to the next stage in which an analysis is made of how far the various dimensions of the concept are associated to the different levels of satisfaction and subjective well-being. In doing so, our aim is to a certain extent to raise the hypothesis that quality of work is presented as a mediating notion, like others, among the various structuring components of the individual insertions in the working world and the quality of life of its agents.

Throughout the text, *subjective well-being* was measured by means of an index composed of the following five items (Cronbach's $\alpha = .877$): a) In most ways my life is close to my ideal; b) The conditions of my life are excellent; c) I am satisfied with my life; d) So far I have got the important things I want in life; e) If I could live my life over, I would change almost nothing. The answers to each question were given on a seven-point scale (from "strongly disagree" to "strongly agree"); the highest figures therefore indicate the highest levels of well-being (Pavot and Diener, 1993).

The levels of *control over work* were obtained by means of an eight item instrument (Cronbach's $\alpha = .796$): a) Do you get to learn new things in your job?; b) Does your job require creativity?; c) Does your job involve repetitive tasks?; d) Are you free to decide how your job is to be done?; e) Are you free to decide what your job involves?; f) Does your job require you to invent your own tasks?; g) Are you free to decide when you do your work?; h) Are you free to decide to work wherever is best for you — either at home or at work? It should be noted that this concept is made up of two principal dimensions — creativity and autonomy — although an overall index is used here (Karasek and Theorell, 1990). This means that in later stages it will be possible to study these two analytically distinguishable dimensions in greater depth. The highest figures in this indicator reflect greater levels of control over work; the answer to each item was given on a four-point scale (from "never" to "always" and inverted for item c).

The concept of *inter-relational support in the workplace*, referring to the respondents' evaluation of the kind of relations established with colleagues and superiors, was measured using a five item score (Cronbach's $\alpha = .841$): a) There is a good spirit of unity; b) My colleagues are there for me; c) People understand that I can have a bad day; d) I get on well with my superiors; e) I get on well with my colleagues. These questions were answered on a five-point scale (from "strongly disagree" to "strongly agree"); the highest figures therefore correspond to what the respondents perceive as the greatest level of support given by colleagues and superiors (Karasek and Theorell, 1990).

Lastly, *job satisfaction* was measured with the following indicator: Broadly speaking, how do you feel about your current job?; the answers vary on a five-point scale between "very bad" and "very good".

Due to the subjective nature of the indicators chosen, the following analysis essentially addresses the respondents' representations of the different aspects of their job. First of all, the associations found between various factors of professional insertions and the differentiated levels of control and inter-relational support in the workplace, as well as satisfaction levels are examined; we then strive to identify some useful points of analysis so as to articulate these selected dimensions with more general levels of well-being.

Work and well-being: factors and levels of quality

The data presented in table 3.1 is used to analyse how the control, support and satisfaction in relation to work are unequally associated to different profiles of professional insertions and subjective evaluation. In the following paragraphs, we highlight some of the correlations between the three indicators selected in relation to quality of work and the other demographic, socio-economic and work factors that are worthy of note.

As might be expected, autonomy and creativity can characterise the more qualified professions so that directors, managers, professionals and mid-level technicians have higher levels of control over what they do at work, while clerical workers have the lowest score. The latter also say they have the least support from colleagues and superiors. It is therefore important to underline that a key variable like profession is not only strongly associated to objective aspects in the definition of quality of life and determining material opportunities, but it also seems to be associated with dimensions of subjective appraisal that contribute to people's definition of well-being as well: the people with more qualified professions also give a more positive evaluation of their opportunities for autonomy and creativity. This does not then have a completely linear transfer in the satisfaction levels which is a variable that we will see intersects differently with other factors related to the sphere of work and also to other domains which are more homogeneous in the various professional categories. Nevertheless, yet again the results

Table 3.1 Work patterns and quality of work (averages)

Variables (%)	Control over work	Workplace support	Job satisfaction
Sex			
Female (53.9)	2.36	3.89*	3.59
Male (46.1)	2.41	3.97*	3.61
Age			
24 or less (3.4)	2.28*	4.22*	3.80*
25 to 34 (44.0)	2.35*	3.97*	3.60*
35 to 44 (35.6)	2.40*	3.85*	3.53*
45 to 54 (13.0)	2.43*	3.88*	3.62*
55 to 64 (4.0)	2.56*	3.99*	3.98*
Education (ISCED)			
Primary (2.2)	2.33	4.23	4.07
Lower level secondary (6.9)	2.46*	4.05	3.87**
Upper secondary (30.4)	2.31*	3.90	3.62**
1st stage of tertiary (54.3)	2.41*	3.92	3.54**
2nd stage of tertiary (5.8)	2.51*	3.87	3.63**
Occupation (ISCO)			
Managers (6.9)	2.77**	4.12**	3.86*
Professionals (28.4)	2.46**	3.93**	3.55*
Technicians and associate professionals (33.9)	2.47**	3.94**	3.60*
Clerks (25.5)	2.10**	3.80**	3.53*
Service workers and shop and market sales workers (4.0)	2.32**	4.08**	3.82*
Supervisory responsibilities			
Yes (32.3)	2.64**	4.01*	3.76**
No (67.7)	2.26**	3.88*	3.53**
Monthly income (in €)			
More than 5000 (7.7)	2.59**	3.89	3.77
3000-5000 (17.3)	2.53**	3.95	3.62
2000-3000 (27.6)	2.39**	3.92	3.58
1000-2000 (36.8)	2.31**	3.94	3.59
Menos de 1000 (10.6)	2.23**	3.90	3.52
Employment contract			
Permanent (85.5)	2.40*	3.91*	3.60
Non-permanent (14.5)	2.29*	4.07*	3.62
Working hours			
Less than 30 (3.1)	2.23**	4.01	3.50
30 a 40 (29.5)	2.25**	3.88	3.59
41 a 50 (55.0)	2.42**	3.95	3.60
More to 50 (12.4)	2.58**	3.91	3.61

Variables (%)	Control over work	Workplace support	Job satisfaction
<i>Overtime on short notice</i>			
Never (18.5)	2.39	4.02*	3.78**
Sometimes (42.7)	2.36	3.96*	3.66**
Often/always (38.8)	2.41	3.85*	3.45**
<i>Used flexible starting and finishing times (last 12 months)</i>			
Yes (39.4)	2.53**	3.99*	3.68*
No (60.6)	2.29**	3.88*	3.54*
<i>Worked from home (last 12 months)</i>			
Yes (11.1)	2.81**	4.16**	3.79*
No (88.9)	2.33**	3.90**	3.58*
<i>Job requires too much input from worker</i>			
Never (8.3)	2.23*	4.04*	3.58**
Sometimes (49.8)	2.38*	3.97*	3.71**
Often/always (41.9)	2.41*	3.86*	3.48**
<i>Worker has enough time to complete tasks</i>			
Never (4.4)	2.30	3.66**	3.00**
Sometimes (42.2)	2.35	3.87**	3.51**
Often/always (53.4)	2.42	3.99**	3.73**
<i>Job involves teamwork</i>			
Never (1.5)	2.03**	3.36**	3.20**
Sometimes (9.5)	2.22**	3.68**	3.35**
Often/always (89.1)	2.41**	3.96**	3.63**
<i>Work-related stress (last month)</i>			
Never (8.8)	2.37	4.13**	3.97**
Sometimes (48.9)	2.40	4.02**	3.73**
Often/always (42.3)	2.37	3.78**	3.37**
<i>Afraid to lose job</i>			
Agree (31.8)	2.27**	3.85**	3.52**
Neither agree nor disagree (25.6)	2.38**	3.88**	3.52**
Disagree (42.6)	2.47**	4.01**	3.71**
<i>Looked for another job (last 6 months)</i>			
Yes (22.1)	2.21**	3.76**	3.13**
No (77.9)	2.43**	3.97**	3.73**

Note: ** $p \leq 0.001$; * $p \leq 0.01$

seem polarised between the directors and senior managers who are the most satisfied and the clerical and service workers.

The distribution of the results across various levels of formal education raises some questions that can only be touched on here but warrant greater attention at later stages of analysis. A limited number of respondents with a low schooling level is considered and it is therefore not possible to propose any in-depth hypotheses. However, it can be questioned whether the relatively small margin of differentiation for the control over work between the respondents with higher levels of schooling and those with less schooling could be related to the fact that the latter group, who are generally older, hold intermediate supervisory positions in the companies where the study was conducted. Indeed, it can be observed that not only are the control levels higher among the workers who supervise other workers, but they get higher with age and therefore with increasing experience and progression in the career. Otherwise, it can be seen that, with the exception of the respondents with the lower level of secondary education, the successively higher qualification levels are associated to growing levels of autonomy and creativity. It can therefore be said that access to higher levels of control over tasks performed is achieved in many different ways albeit associated to the workers' formal qualification.

Nevertheless, we stress the relatively low average for job satisfaction obtained among people with the first stage of tertiary education. One of the possible explanations for this stands out as being worthy of analysis in future research: this could be a case of a mismatch between the formal education levels and the job characteristics, the work done and the material and symbolic compensation associated (Green, 2006). These situations can give rise to failed expectations and to skills and potential being blocked by objective constraints, in which many workers with relatively high levels of education tend to evaluate their working situation more negatively when compared with previous expectations, social comparison processes and perceptions of unused skills. It could explain why the respondents with a Bachelor degree or *licenciatura* (five-year degree) have the lowest levels of job satisfaction.

As the levels of control over work increase with the levels of professional qualification (highest among directors and senior managers), with age and also with the number of weekly working hours (highest among those who work over 40 hours), this conjugation of factors may, not unexpectedly, be reflected in the household income levels: autonomy and creativity are associated with the highest amount of monthly income.³

3 We note that this last variable only reflects the individual salary level of the respondents very indirectly as it refers to levels of household total net income.

It also comes as no surprise that the workers with permanent contracts say they enjoy greater autonomy and creativity than those in more precarious contractual situations: the latter are generally younger (average 31 years old compared with 38 years for the former) and do less qualified work in the various companies, notably in clerical work (and in particular women).

Turning now to the other variables related to the people's objective insertion in the labour contexts, it can be said that some flexible working practices are found to be associated to higher levels of control. More specifically, working from home and flexible starting and finishing times for example are more common among the professions characterised as having more autonomy and creativity. Indeed, it is important here to stress that the use of these flexible working practices is very unequally distributed among the respondents: whereas about half of the directors and senior managers say they benefited from flexible timetables over the last year, 75% of clerical workers have not; while 24% of the former and 14% of professionals say they have worked from home, almost none of the interesting to note that the highest figures for inter-relational workplace support are found to be associated both to the use of flexible working practices considered here and to less frequent overtime. This only helps underline the importance of the relational aspects of work to a circumscribed dimension in determining the way people evaluate their jobs: in this case, the hypothesis can be proposed that good social integration in the work context is an important factor for a sustainable and positive use of flexible working practices, achieved notably by means of the various kinds of support given by colleagues and superiors. Along this line, it is also noted that the stronger subjective perceptions of belonging to a "team" are clearly associated with higher levels of control, inter-relational support and satisfaction.

Meanwhile, on looking at the way in which the inter-relational dimension of the quality of work used here varies in line with the various factors set out in table 3.1, it can be said that the general image is not as clear-cut as the one drawn by the control dimension. It is very likely that the explanation for this lies in the fact that there are other more contextual and individual factors that change people's perception of the support that is given to them by colleagues and superiors when doing their work. But, while it is the way some work insertion factors affect people's quality of work that above all is under analysis, later in this chapter we will see how this inter-relational support dimension is important because it works as a mediator between the working conditions and job satisfaction on one hand, and these conditions and the declared levels of well-being on the other.

If we are to get a better understanding of these factors that condition the "quality" of the various jobs, it is also necessary to observe the articulations that are formed between more evaluative and subjective factors i.e. the perceptions of the working conditions (Wallace, Pichler and Hayes, 2007) and the various dimensions of quality used here.

From the outset, it is important to see how higher levels of control over work are found to be associated to the perception that the job is “too demanding”. This is a known effect (Gallie, 1996; Green, 2006) and is tied to the specific characteristics of professions characterised as having autonomy and creativity. The workers with more schooling and organisational resources, who have more scope to control and define the tasks and timetables, are also the ones who generally have most responsibility and work the most hours during a week. The stress levels related to the job are also greater among directors and other workers with supervisory responsibilities. On the other hand, “working as a member of a team” and being well integrated in relational terms are factors that seem to contribute to minimising the potentially negative effects of more demanding professions: it can be said that the respondents who felt they could be sure of the support of colleagues and superiors are also the ones who can deal most easily with specific demands on time and effort; moreover, counting on more inter-relational support seems to be associated to the lowest stated levels of professional stress.

This multidimensional articulation of factors (note how the declared levels of professional stress for example are still not significantly associated to control over work) mean that the complex notion of quality of work, or any of its various dimensions, cannot be confronted in a linear fashion. Therefore, when taken as a whole these different articulations and effects that have been highlighted are relevant insofar as they have a great impact not only on other dimensions of work, but also on other domains like how work and family are conciliated, the quality of family life and also levels of well-being that people can enjoy.

Other factors included in table 3.1 also warrant emphasis. Though this is a preliminary analysis, it is useful to start constructing an approach which will allow the tracks identified here to be placed on sounder analytical foundations in later stages. Hence, the issue of precariousness and insecurity at work has been the focus of growing attention among a wide and diversified set of scientific, media and political agents following a series of structural changes that have been changing the face of the world of work in Europe in recent decades. Our aim here is simply to start constructing a perspective that addresses the consequences of (in)security on the quality of work as perceived by the workers themselves. On the basis of the items under analysis, it can be said that the subjective feelings of insecurity are associated to lower levels of autonomy and creativity, as well as the working environment where there is less inter-relational support. It is therefore not surprising, and as we have already seen, that people who have a permanent contractual tie with the companies where they work say they have relatively high levels of control and support. Nevertheless, it should be stressed that the feelings of (in)security and the way they condition the evaluations people make of their work and their feelings of well-being undoubtedly depend on complex articulations between objective aspects of

insertion at work, concrete daily experiences and less tangible individual perceptions.⁴ As quality of work is a broad notion that cannot be reduced to evaluations that individuals make about their jobs at a specific moment in time, these reflective considerations should not be forgotten if we wish to obtain a fuller picture of the articulation between objective and subjective patterns that contribute in the field of work, as in others, to shaping the opportunities to obtain well-being and quality of life.

We can now turn from this overview and focus more directly on patterns of satisfaction as a key dimension of the quality of work.

The findings given here are in line with some of the conclusions presented in the literature on the influence of some demographic variables such as sex, age and level of schooling (Clark, Oswald and Warr, 1996; Clark, 2005; Wallace, Pichler and Hayes, 2007). Though there appears to be no direct or simple relation between gender and job satisfaction,⁵ age has a “U” shaped association with satisfaction levels in which two peaks are observed: in workers under the age of 25 and over the age of 55, while the lowest levels are found in the intermediate 35 to 44 year age group. This interesting finding probably indicates the influence of other factors that are involved in the world of work and that help shape expectations and subjective evaluations. Notably, the specific configuration of the work-family articulation profiles are in question here as the lowest job satisfaction figures appear precisely in the age groups with the greatest daily need to conciliate professional and family responsibilities and tasks. As we shall see later, the way this balance is achieved (or not) has a strong impact on people’s well-being.

It is curious to note that some variables referring to the working sphere like the number of working hours⁶ and the kind of contract do not have a direct effect on workers’ satisfaction, although frequently working longer hours than stipulated in the contract is associated to lower levels of satisfaction. The negative or positive effects of these variables certainly depend on a

4 See for example how the kind of contract is not enough to directly distinguish the respondent with regard job satisfaction, while another variable like “afraid to lose job” is associated to lower levels of satisfaction.

5 Women might be expected to have lower satisfaction levels due both to the structural effects of vertical and horizontal segregation that contribute to concentrating women in less qualified professions of the labour market, and also to the extra workloads resulting from the persistent inequality in the division of household chores between men and women that make a balanced conciliation of work and family more complicated. The problem is considerably complex however insofar as it is intersected by the conjugated influence of class, expectations and distinct social values, gender roles and the socio-psychological process of adaptation and social comparison. In more general terms, the importance of gender in determining people’s quality of life is transversal but mediated and can be captured by its articulation with other dimensions like profession, the profiles of the work-family relationship and the forms of unpaid work in the family sphere for example.

Table 3.2 Quality of work and subjective well-being (averages)

Variables (%)	Job satisfaction	Subjectivs well-being
<i>Control over work</i>		
High (13.1)	4.10	5.08
Medium (68.0)	3.63	4.44
Low (18.9)	3.17	3.99
<i>Workplace support</i>		
High (55.2)	3.88	4.66
Medium (37.2)	3.36	4.27
Low (7.6)	2.74	3.65
<i>Job satisfaction</i>		
High (61.6)	–	4.80
Medium (28.7)	–	4.04
Low (9.7)	–	3.30

Note: $p \leq 0.001$ (all cells).

wider range of factors within and beyond the working world that raise or limit a person's ability to deal with the more intensive levels of work or with more precarious contractual situations for example. The possibility of integrating successfully in the labour relations network may act as a compensatory factor for more demanding or insecure insertion conditions, as we have seen in relation to another issue.

Lastly, when other more "subjective" variables are examined, it can be seen that workers/respondents had a greater feeling of satisfaction when the work involved the "right amount" of demands: excessive demands or a rather unchallenging job can contribute to people making a less positive evaluation of what they do. It also comes as no surprise that professional stress has clearly negative effect on the evaluations made by the respondents.

So far, our analysis has centred on how factors in the work milieu are associated to different levels and dimensions of quality of life at work. It is found that both working conditions and other objective insertion variables that are subjectively evaluated have a sociologically significant articulation with different opportunities to control and conduct tasks and enjoy inter-relational support. Although this kind of analysis cannot provide a more in-depth understanding of the causal direction established between the different variables (Diener and Suh, 1997; Veenhoven, 1996), the profiles and

6 However, attention could be drawn to the fact that those who work less than 30 hours a week are the least satisfied. This could undoubtedly be linked to the overall characteristics of the labour market in Portugal, where there are relatively few and badly paid opportunities for part-time work. The hypothesis could therefore be proposed that some of these respondents, who are mainly women, would choose to work full time if given the opportunity.

articulations that have been highlighted are sufficiently clear and homogeneous to call attention to the factors analysed when taken as a whole.

The quality of work is very important not only in relation to people's satisfaction in this central area of their lives but also to shaping the levels of well-being. On one hand, various studies have demonstrated the links between the quality of work and levels of worker productivity and engagement, experiences and levels of professional stress and conflict between work and family (Danna and Griffin, 1999; Edwards, Scully and Brtek, 2000; Efraty and Sirgy, 1990; Green, 2006; Sirgy *et al.*, 2001; Wallace, Pichler and Hayes, 2007). But empirical evidence has also been found related to the articulations between the quality of work and more general feelings of satisfaction and quality of life (Diener, 1994; Diener and Suh, 1997; Sirgy *et al.*, 2006; Veenhoven, 1996). Notably, the notion of satisfaction appears as an important mediator among more specific aspects related to work and the broad evaluations of subjective well-being (Wallace, Pichler and Hayes, 2007).

In light of these considerations, the relations established between the quality of work and subjective well-being can now be examined and analysed on the basis of the workers responses (table 3.2).

Some clearly visible effects should be noted on observing this table: not only do the two main quality indicators, control and support, have an impact on job satisfaction levels but also on the evaluations of well-being. Nearly a one-point difference separates the satisfaction averages of those who enjoy a high level of control over their work (4.10), and those who say they have a low level of control (3.17). As already mentioned, the social and relational work contexts also take on special relevance in determining the quality of working life: working in a place with an atmosphere of great mutual support between colleagues and superiors seems to be associated to higher levels of satisfaction (3.88); on the other hand, people who say they have little support in their place of work are more dissatisfied (2.74).

On observing levels of subjective well-being, it is found they vary in accordance with whether the respondents have a higher or lower quality of work through the three dimensions presented here. Accordingly, workers with low levels of job satisfaction have the lowest average figures (3.30), while those in more autonomous and creative jobs also state they have the best levels of well-being (5.08). The differentiated levels of integration in inter-relational support networks also have a considerable effect on the subjective evaluations people made about their quality of life, as can be seen. Obviously the way people's quality of work, in its complexity, helps boost capacities or limit opportunities to obtain well-being is much more important than the isolated effect of each of these dimensions. It would be useful here in later stages of research to measure not only the relative importance of each of these dimensions but also to develop more precise indicators of the quality of work and apply more sophisticated methods of extensive analysis. This is the only way in which greater

insight can be gleaned into the factors that determine the quality of work, whether or not they belong to the work sphere, and also into the way these and other key spheres in the structuring of daily life articulate in the configuration of opportunities and constraints that people come up against and which should be taken into account in the analysis of their quality of life.

Factors and levels of well-being in the balance between work and family life

Just like the work domain addressed in the previous point, family life plays a central role in determining a person's well-being. More specifically, the way everyday relations are established between paid work and unpaid work is crucial not only to quality of life generally, but also to satisfaction with the job itself and job performance (Guerreiro, 2004; Guerreiro and Carvalho, 2007; Lewis and Cooper, 2005; Lewis and Rapoport, 2005; Rapoport *et al.*, 2002).

The starting point of much research on work/family relations is that of the theory of gender roles by the emphasis given to the limited amount of physical, psychological and time resources people have that are confronted by the need to exert their energy and these resources in everyday life in the various spheres of activity. Hence, interference, conflict and stress processes may emerge from unsuitable patterns of work/family conciliation that end up having a negative influence on feelings and evaluations of well-being (Noor, 2003; Nordenmark, 2002; Scharlach, 2001).

Arising from this perspective, much of the analytical attention of the various studies has focused on the negative effects that the interference and conflict processes between work and family can originate, although the specific angle of the approaches may vary considerably (Crompton, 2006; Crompton and Lyonette, 2007; Lewis and Cooper, 1999). Gender, for example, generally appears as a predominant factor in the analyses conducted on the conflicts between family and working life: gender roles are symbolic and culturally loaded, which helps shape expectations and ways of behaviour that are profoundly articulated both with the kinds of family relations and the various ways men and women participate in the labour market (Dulk and Peper, 2007). Until very recently, circulating on a daily basis between the family sphere and the work domain meant, and still means to some extent, fundamentally different experiences for men and women insofar as women took, and still take, the main responsibility for doing household chores and looking after the children (Torres, 2004; Wall and Guerreiro, 2005). With the progressive entry of women into the labour market that has been taking place in recent decades, along with the decline in the more traditional models of sharing professional and family responsibilities (Amâncio, 2007), the problems arising from the imbalances found in the work/family relationship have also started to assume greater importance and visibility. Notably why most women who have a

job still have to put up with a “double work shift” nowadays: at work and at home (Crompton, 2006; Hochschild, 1989 and 1997). Hence, special attention has been devoted to analysing the conciliation patterns in families where the couple both have a paid job that must be articulated with family chores and responsibilities; focus has been given in particular to the various effects and dynamics of interference and conflict between the two spheres that have been caused by inappropriate (and unequally distributed in line with social differentiation of gender, social class, etc.) patterns of carrying out multiple “social roles”, sometimes in a contrasting fashion. More recently, the relations between these negative effects and quality of work, the family relations and quality of life have been the object of increasing and detailed study (Guerreiro, 2004; Guerreiro and Carvalho, 2007; Lewis and Dyer, 2002; Lewis and Cooper, 2005).

The various studies have contributed to demonstrating that both family factors and work related variables are significantly associated to different negative interference profiles of work in the family, and the family in work, and with the satisfaction people report on the division of time and resources between these two domains (Guerreiro and Carvalho, 2007; Kovacheva, Lewis and Demivera, 2005; Lewis and Cooper, 1999, 2005; Peper, Doorne-Huiskes and Dulk, 2005). Working conditions and objective means of insertion in the job, for example, are found to be associated to different levels of stress and interference between family and working spheres together with other variables such as the level of inter-relational support in the work contexts that will be examined more closely in the following points.

However, before advancing to the analysis *per se* of some data selected for this point, one dimension of this question that has been gaining increasing relevance and which will be the target of specific attention in later stages of the analysis must be emphasised. In fact, if we wish to be true to the complexity of work/family relations, they can and should be addressed from standpoints that complement approaches underlining the conflictual aspects that can arise from this relationship. More recently, attention has started to be given to the positive effects that playing multiple roles in various spheres of activity originates, be it in terms of the accumulation of material and cultural resources or the development of more extensive socialising and support networks. Specifically with regard work/family relations, focus has been placed on the possible individual benefits resulting from a harmonious combination of chores and professional, family and domestic responsibilities. This perspective is frequently pursued in the framework of spillover theories, underlining the social and psychological fluxes and transfers of a positive nature that are established between these two central domains of life (Barnett and Hyde, 2001; Greenhaus and Powell, 2005; Nordenmark, 2002). It should also be noted that these mechanisms are in no

way one-directional; in fact, family life can interfere positively or negatively in the work domain, just as professional life is likely to influence the way family lifestyles are structured in various ways.

Given the specific scope of this exploratory study defined above, we chose to focus our attention in the following analysis on the articulations that can be observed between work and the negative effects of the interference between this sphere and the family. We will examine how the various key factors of the work context and insertion are associated or not to different kinds of evaluation and levels of satisfaction with the way in which the respondents divide their time and resources between the private/family domain and the work domain in their daily lives. A more in-depth analysis must clearly take into account the crossed and simultaneous interactions between multiple variables and particularly those related to family structures and dynamics; nevertheless, our exploratory analysis contributes not only to testing some composite measures, but also to opening analytical paths that are required if these stages of progressive analytical development are to be reached.

Indicators

Three indicators were used to address the workers/respondents' profiles of satisfaction with work/family relations: negative work-to-home interference, negative home-to-work interference (Geurts *et al.*, 2005), and satisfaction with the division of time and resources between work and family. Just as in the previous section on the quality of work, some important variables in relation to working conditions and forms of work insertion are also presented here; the inter-relations considered most relevant from the sociological standpoint were chosen for comment.

The *negative work-to-home interference* (W-H) was measured using a three-item index (Cronbach's $\alpha = 0.738$): a) How often does it happen that you do not have the energy to engage in leisure activities with your spouse/family/friends because of your job?; b) How often does it happen that you have to work so hard that you do not have time for any of your hobbies?; c) How often does it happen that your work obligations make it difficult for you to feel relaxed at home? The highest figures correspond to the greatest levels of interference between work and family (it is a four-point scale: from "never" to "always").

The *negative home-to-work interference* (H-W) was also measured with a three-item index (Cronbach's $\alpha = 0.827$): a) How often does it happen that you do not fully enjoy your work because you worry about your home situation?; b) How often does it happen that you have difficulty concentrating on your work because you are preoccupied with domestic matters?; c) How often does it happen that you do not feel like working because of problems with your spouse/family/friends? Obviously, the highest figures correspond to the greatest levels of interference between family and work.

To gauge respondents' satisfaction with the relationship between work and family, a three-item index was used (Cronbach's $\alpha = 0.911$) with a five-point scale (from "very dissatisfied" to "very satisfied"): a) The way you divide your time between work and personal life; b) Your ability to meet the needs of your job with those of your personal or family life; c) The opportunity you have to perform your job well and yet be able to perform home-related duties adequately. The highest averages reflect the most positive evaluations (Valcour, 2007).

Between work and family, what well-being?

On observing the data regarding the respondents' evaluation of work/family relations in table 3.3, emphasis can be given firstly to the overall importance placed on the profiles of professional insertion.

The interference dynamics between the work and home domains, be it in one direction or the other, are associated to various objective and also more subjective factors that contribute to framing the opportunities the workers have to articulate the sometimes contrasting chores and varied and demanding responsibilities in their everyday lives in a more or less harmonious fashion. It is clear that the negative interference process of work to home or of home to work are partially autonomous which is also revealed by their differential association to the work sphere. In light of the focus adopted here, our attention is concentrated essentially on the former.

As might be expected, the number of hours people spend at work is vital at this simple level of analysis to determining the respondents' declared levels of interference of work in family life. It must be stressed that 67% work over 40 hours a week and that 12% even work over 50 hours; this use of time undoubtedly helps explain why the latter have the highest average of W-H interference. Significantly, they are also the least satisfied with the way they divide their time and resources between the two domains. The associations between the frequent use of overtime and higher levels of W-H interference on one hand and less positive appraisals of the W-H relations on the help strengthen these effects.

The data presented here also suggest that the professions that are perceived to be too demanding either in terms of content and more substantive tasks or in relation to working hours and deadlines are associated to more negative evaluations of interference in both the directions and the generally less positive appraisals about the division of individual time and resources. We must recall what was said above about the workers with the greatest organisational resources such as directors and senior managers or workers with supervisory responsibilities who are found to have non-linear positions with regard the quality of work and, as we can see, also in relation to the quality of family life: it is they that believe they have the greatest levels of interference of work to home, and are also the least

Table 3.3 Work patterns and work-life balance (averages)

Variables (%)	Interference W-H	Interference H-W	Work-life balance satisfaction
Sex			
Female (53.9)	2.04	1.52*	3.15
Male (46.1)	2.01	1.45*	3.19
Age			
24 or less (3.4)	1.86	1.36	3.51**
25 to 34 (44.0)	2.01	1.46	3.16**
35 to 44 (35.6)	2.04	1.51	3.12**
45 to 54 (13.0)	2.10	1.55	3.11**
55 to 64 (4.0)	1.97	1.47	3.55**
Education (ISCED)			
Primary (2.2)	1.78	1.29	3.79
Lower level secondary (6.9)	1.92	1.44	3.45**
Upper secondary (30.4)	2.00	1.51	3.18**
1 st stage of tertiary (54.3)	2.06	1.49	3.10**
2 nd stage of tertiary (5.8)	2.09	1.50	3.16**
Occupation (ISCO)			
Managers (6.9)	2.21**	1.49	2.92**
Professionals (28.4)	2.08**	1.48	3.16**
Technicians and associate professionals (33.9)	2.04**	1.47	3.08**
Clerks (25.5)	1.94**	1.54	3.26**
Service workers and shop and market sales workers (4.0)	1.79**	1.40	3.55**
Supervisory responsibilities			
Yes (32.3)	2.16**	1.48	3.04**
No (67.7)	1.96**	1.49	3.23**
Monthly income (in €)			
Mores than 5000 (7.7)	2.17	1.52	3.13
3000-5000 (17.3)	2.06	1.46	3.04
2000-3000 (27.6)	2.01	1.51	3.13
1000-2000 (36.8)	2.01	1.48	3.24
Menos de 1000 (10.6)	1.96	1.48	3.24
Working hours			
Less than 30 (3.1)	1.79**	1.49	3.29**
30 to 40 (29.5)	1.82**	1.49	3.44**
41 to 50 (55.0)	2.06**	1.48	3.10**
More than 50 (12.4)	2.43**	1.55	2.75**
Overtime on short notice			
Never (18.5)	1.84**	1.43	3.45**
Sometimes (42.7)	1.90**	1.48	3.30**
Often/always (38.8)	2.25**	1.53	2.89**

Variables (%)	Interference W-H	Interference H-W	Work-life balance satisfaction
<i>Job requires too much input from worker</i>			
Never (8.3)	1.61**	1.35*	3.58**
Sometimes (49.8)	1.89**	1.47*	3.36**
Often/always (41.9)	2.26**	1.53*	2.86**
<i>Worker has enough time to complete tasks</i>			
Never (4.4)	2.44**	1.67*	2.62**
Sometimes (42.2)	2.18**	1.52*	2.94**
Often/always (53.4)	1.87**	1.46*	3.40**
<i>Does your job often make conflicting demands on you?</i>			
Never (12.7)	1.64**	1.40**	3.70**
Sometimes (57.8)	1.96**	1.47**	3.25**
Often/always (29.5)	2.31**	1.56**	2.77**
<i>Afraid lose job</i>			
Agree (31.8)	2.13**	1.54**	3.08*
Neither agree nor disagree (25.6)	2.05**	1.53**	3.12*
Disagree (42.6)	1.93**	1.43**	3.25*
<i>Control over work</i>			
High (13.1)	1.95	1.41	3.45**
Medium (68.0)	2.05	1.50	3.14**
Low (18.9)	1.99	1.51	3.07**
<i>Workplace support</i>			
High (55.2)	1.94**	1.44**	3.33**
Medium (37.2)	2.09**	1.54**	3.00**
Low (7.6)	2.28**	1.58**	2.77**
<i>Work-related stress (last month)</i>			
Never (8.8)	1.46**	1.30**	3.75**
Sometimes (48.9)	1.85**	1.45**	3.39**
Often/always (42.3)	2.35**	1.58**	2.79**
<i>Family related stress (last month)</i>			
Never (22.5)	1.83**	1.21**	3.37**
Sometimes (55.6)	1.99**	1.47**	3.20**
Often/always (22.0)	2.31**	1.83**	2.87**

Note: $p \leq 0,001$ (all cells).

happy when evaluating the way they go between the two domains in their daily lives.

Though not directly associated to the two interference indicators, the level of control over work can be taken into account when considering workers' satisfaction with the daily bridges between work and family: greater autonomy to define work time and circumstances may contribute to harmonising and moderating the allocation of effort and resources; this clearly does not prevent certain problems and tensions originating in one domain "spilling-over" to the other. In other words, we can venture to say at a more theoretical level, that while the satisfaction index refers to a more general and all-encompassing cognitive evaluation made by the respondents about how they move between work and family, the interference indicators refer to more concrete events that can be more easily localised in daily life; this helps explain the articulation patterns of these factors with the level of control over work.

On the other hand, the social context of work is consistently found to be associated through the three measurements presented in table 3.3: more harmonious work/family relations are more easily obtained in working contexts characterised by higher levels of inter-relational support; that is, the data suggests that the ways in which people join social networks made up of colleagues and superiors, that constitute the relational organisation of workplaces, assume great importance in the shaping of work/family relations. This notion of inter-relational support warrants a more in-depth analysis insofar as it is used here simply for characterisation and general exploratory purposes: notably, a more detailed analysis should be conducted of the way in which more informal or discretionary aspects of relations and camaraderie are interweaved in this support with more organisational or impersonal components of the workers' context. Indeed, the importance of this analytical dimension was already very apparent in the analysis on the quality of work.

The specificity of the interference variables, strongly associated to two determinant and articulated spheres structuring people's lives like work and the family, will help shed light on the general non-existence of significant associations between them and some socio-demographic categories presented in table 3.3. In fact, the effects of these factors are to some extent mediated and deflected by diverse combinations of aspects that structure professional and family insertions. We have been placing emphasis on the fact that profiles of the W-H and H-W interference evaluations and of the work/family relations evaluations are generally entangled in work and also family configurations that are transversal to these more far-reaching social categories. Nevertheless, it must also be noted that the interference of family life in work is greater among women.

A more detailed analysis of the patterns of H-W interference is beyond the scope of this paper given that our chosen focus of study were the work factors affecting people's insertion, leaving the equally important family variables in all their complexity for a later date. The latter variable will tend to be primarily

associated to factors pertaining to family structures and dynamics. However, it should be noted that problems originating in this domain could “spillover” to the other, aggravated by time and commitment pressures and particularly demanding work. Yet again, more stable insertions in inter-relational work networks seem to be linked to lower levels of declared interference of family life at work which again raises the importance of the social contexts in the workplace in determining people’s quality of life in its multiple dimensions.

On the basis of all that has been said herein, it can be stated that some important patterns of professional insertion are significantly associated to different levels of subjective perception of negative interferences between professional and home life and different evaluations of satisfaction with work/family relations. However, the way these representation of the various forms of articulating chores and responsibilities and using time and resources affect people’s quality of life is of greatest interest in this context. After all, between work and family, what well-being?

Data set out in table 3.4 serves to begin identifying some provisional responses to this key question.

First and foremost, it can be said that the most common processes of negative interference between domains originate in the work sphere, though the proportion of respondents who say they have high levels of interference is low in both cases. There are also modest overall differences between men and women on this matter though women are more affected at work by family related matters. It seems therefore that most of the workers/respondents can limit the “over-spill” of the impacts that individual demands and investments in each domain may convey.⁷

The question of work/family relations is obviously not restricted to the perception of direct negative interferences, which are more or less tangible and defined in time, between the demands of the two spheres. Hence, it can be seen that the panorama of responses on the general satisfaction with the way in which people circulate between work and family life is extremely fragmented with a significant proportion saying that they are unhappy (about 34%). More reflective and far-reaching evaluations, like those asked for in this case, not only refer to the present situation but also imply more prospective and comparative components: “I am not in a bad position but it could be better”, or “if I could, I would like to spend more time with my family”, for example.

Table 3.4 contributes to a last hypothesis to be developed on the relations between work, family and well-being.

7 It is noted again that an analysis such as this cannot take the complex effects of gender into account that work through mediations of professional status, class, age, etc.; it is likely that a more in-depth analysis would unveil articulation that a general overview of the topic necessarily cannot contemplate.

Table 3.4 Work-life balance and subjective well-being (averages)

Variables (%)	Job satisfaction		Subjective well-being	
	M	H	M	H
<i>Interference W-H</i>				
Low (36.7)	3.81	3.78	4.81	4.74
Medium (53.6)	3.52	3.57	4.32	4.35
High (9.7)	3.20	3.07	3.82	3.62
<i>Interference H-W</i>				
Low (70.7)	3.64	3.67	4.61	4.56
Medium (27.7)	3.52	3.46	4.13	4.11
High (1.6)	2.94	2.40	3.43	3.04
<i>Work-life balance satisfaction</i>				
High (34.6)	3.92	3.96	4.88	5.00
Medium (31.7)	3.54	3.58	4.57	4.53
High (33.7)	3.33	3.26	3.91	3.76

Nota: $p \leq 0,001$ (all cells).

It must be understood that the indicators of interference between domains and satisfaction presented here are clearly and significantly associated to different declarations of well-being. But the bridges formed between work and personal and family life also influence the way people ultimately perceive their own work: when the domains shock with each other more forcefully, and particularly when there are aspects of family life that interfere negatively with professional life, it becomes difficult for women, and also men, to appreciate their work. It can be said that the workers who feel most satisfied with the way they conciliate the chores and needs of family and working life in their day to day are also very probably the ones with the most appreciable quality of life.

Concluding notes

This chapter has sought to make an exploratory analysis of the levels and profiles of well-being and quality of life of workers in the service sector, using a questionnaire enquiry conducted in the scope of the Quality of Life in a Changing Europe project. A first analysis of the Portuguese data is presented here in which some of the indicators about the quality of work, satisfaction with work-family articulation and subjective well-being are examined. The following questions were proposed as orientation for the study: in what way are perceptions and evaluations of satisfaction and well-being associated to the levels of work quality? How do the key factors in relation to work articulate with the subjective evaluations of the quality of life? How do these representations and appreciations change in response to standardised combinations

between family and work? What relationships can be identified between quality of life and the work-family balance on the one hand, and satisfaction with work and well-being on the other?

Following this brief summary of the main theoretical contributions that shed light on the question under analysis, the text is structured in two stages. Firstly, a set of variables related to working conditions and forms of professional insertion was used in an attempt to ascertain the associations between these factors, levels of satisfaction with work and levels of well-being. Then, we examined the way in which these work variables were related with the evaluation made of the balance between work and family life, and the implications thereof for job satisfaction and the feeling of well-being expressed by the respondents.

Quality of work was measured using three indicators: control over work, inter-relational support and satisfaction, which were applied to identify some profiles of professional insertion. Higher levels of quality of work were found among the following workers: the more highly qualified, older, male, with supervisory functions, earning higher incomes, with permanent contracts, working more hours a week, who can work flexible timetables, who say their job is sufficiently demanding, who have time to do their work and do team work. Greater quality of work is also associated to those who are not afraid of losing their job and have not recently looked for a new job.

The exception to this general trend in the reading of the quality of work indicators is found among those with the first stage of tertiary education who register lower levels of job satisfaction; this may be because there is a mismatch between their qualifications, work done, material or symbolic compensation and contractual bond. As the notion of satisfaction appears in the literature consulted as an important mediator between specific work-related factors and evaluations of well-being broadly speaking, the study subsequently focused on the relation between the quality of work dimensions and the evaluations of satisfaction and well-being. In fact, people who have greater control over their work and are integrated in situations where there is more support among colleagues and superiors express higher levels of job satisfaction and more subjective well-being.

A second stage of the analysis focused on the articulation between work and the negative effects of interference between the work and family spheres using composite indicators of the negative interference of work-to-home, the negative interference of home-to-work and satisfaction with the relations between work and family. Working hours, which are over 40 hours a week for 67% of the respondents, are a key interference factor in family life. An association is therefore found between a greater number of working hours and less satisfaction with the way work and family life are articulated; this profile corresponds predominantly to the respondents in more qualified professions, in

more demanding jobs with hierarchical responsibilities who make more negative appraisals of the reciprocal interference between work and family. While recognising on one hand that extra working hours prevents them from being available to take responsibilities in the private domain, this may be exposed to tensions that impact the professional sphere and thus leads to appraisals of dissatisfaction about the relations between one sphere and the other.

It is to be noted that the interferences are even greater for those who expressed they had recently suffered from work or family related stress, and by those who say they have less support from colleagues and superiors. On the other hand, the relation between the factors of control over work and satisfaction with how work and family are conciliated, indicative of the possibility to manage their work time and practices, is important to reduce the negative effects and harmonise the action in the two domains of a person's life.

Finally, the analysis resulted in the identification of greater levels of work's medium or high negative interference in the home (63%) than the inverse (29%) and low satisfaction with work/family relations in 34% of the cases. The differences detected between men and women in the results are negligible although women are found to be more affected professionally by family factors. Moreover, job satisfaction and subjective well-being are greater among those who say they have a more positive experience of relations and influences between the work and family domains. However, the appraisals of job satisfaction and subjective well-being indices in these situations are generally lower among men; it would appear that women are culturally more accustomed to systematically dealing with these negative effects. Levels of well-being among men are only higher when they are satisfied with work/family relations. As men have been confronted more recently with identity attributions that associate them to new social commitments in the scope of their private lives, these seem to lower their levels of satisfaction and well-being considerably in relation to the resulting interferences and tensions. Nevertheless, it is noted that these suggested interpretations require more in-depth study in future analyses that incorporate other variables e.g. professional and family status, the phase of life and social class, that will allow greater light to be shed on the complex gender effects herein.

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The changing everyday life of health

Noémia Lopes and Felismina Mendes

The genesis of modernity in the health field is associated with a framework of change that, in sociological theory, is called the phenomenon of *medicalisation*. This concept originally developed by Irving Zola (1972, in Crawford, 1980) describes the progressive expansion of medicine to successively broader spheres of human existence and (its) social management. The transition to the domain of medical intervention regarding behaviours falling under the category of social deviation — such as violence or alcoholism — and by particular bodily functions that are traditionally naturalised and private — like sexuality or procreation — is an expression of the emergence of this phenomenon, which began in the early 20th century but was only socially consolidated some decades later.

The analytical relevance of the concept of medicalisation lies in its semantic duality. It signifies not only the progressive extension of medical intervention within the social tissue but also another aspect: the progressive cultural dissemination of medical ideology itself (Crawford, 1980). This other aspect, which began to gain more social visibility in the second half of the 20th century, is shown by the population's generalised tendency to resort to medical categories and conceptions to interpret health, sickness and the body.

The phenomenon of medicalisation, is therefore a process achieved and consolidated by the progressive dilution of traditional legitimisations in collective representations on health — associated with beliefs in fate and designs of nature and/or the supernatural — and replacing them with modern legitimisations based on science and technology (Britten, 1996). Or, as Williams and Calnan (1996) claim, medicalisation indicates a change in the forms of legitimisation, bringing the emergence of new rationalities in the field of health and a gradual convergence between *rationalisation from above* i.e. the penetration of the overall cultural model by new forms of legitimisation — and *rationalisation from below* — i.e. a penetration by dominant forms of legitimisation at an individual and sub-cultural level.

Within this framework of change, the most recent scientific and technological developments in health have brought new social dynamics to the dissemination of medicalisation. *Predictive* medicine — spurred by new breakthroughs in genetics and molecular biology — is creating new areas in everyday health and sickness, transferring to the medical sphere, not only the management of the present but also the present management of eventuality of future risks. It is the discovery of genetic risk. With this other perspective, the present and future of health possibilities (depending on the decoding of the past) set out on a trajectory of uncertainty that enshrines the social dominance and hegemony of the medicalisation paradigm.

As several authors sustain, namely Giddens (1992, 1997), one of the marked traits of modernity is the growing inclusion of vaster material and social areas under the orientation of expert systems. Taking this in its strictest sense, what we find in this context of modernity is an irrevocable dispossession of traditional areas of lay autonomy and their cognitive and practical resources, including in the field of everyday management of health and illness. Or, from the point of view of the analysis by Santos, (2000), this context shows a growing *colonisation* of lay universes by expert systems and, correlatively, of the rationalities and autonomies intrinsic to it.

Nevertheless, it is important to bear in mind that the dominance of expertise in everyday life also means a growing routinisation of laymen's contact with experts. The routinisation of these contacts not only represents an increase on lay dependence but has also generated new possibilities for lay re-appropriations of expert knowledge and its re-elaboration in a new frame of reference and action. These re-elaborations configure new relationships between two traditionally opposing worlds — that of expert knowledge and that of lay knowledge — in that, as Giddens (1992) also says, technical expertise is continuously being taken over by common agents as part of their relationship with abstract systems.

Therefore, with the breakdown of the social distance and social opacity — nevertheless the maintenance of cognitive distance and cognitive opacity — that the world of science and experts represented for the lay universes, results in that lay appropriations of expertise not only become inevitable but also turn into a new resource of reflexivity. Reflexivity-based knowledge took the place of the belief and tradition-based knowledge that sustained previous models of reproduction of lay knowledge. Tradition itself, as the oracle of common know-how is only accepted in modernity if it is justified by some knowledge — which puts reflexivity back in the centre of the paradigm of lay rationality. Science is also now questioned in the light of the new knowledge constantly being produced by expert systems and made know to the public (Giddens, 1992).

As a result, and still from Giddens's (1997) analytical point of view, although individuals include more and more information on the behalf of

expert systems in their frame of reference, their attitudes towards science and technical knowledge are generally ambivalent. Ambivalence becomes a central characteristic of lay attitudes, where there is a mixture of deference and scepticism towards science.

One of the current challenges in the sociology of health is precisely disclosing how, in the current context of medicalisation dominance, new forms of dependency and lay autonomy towards expertise, are developed, articulated and redefined. In other words, restoring visibility to the social processes, contexts and conditions leading to the alternation between increasing dependency and reactivating autonomy, and so demonstrating the social dialectics and dynamics that are reconfiguring the traditional modalities of lay protagonism in the health field.

The two thematic issues addressed below, are based on two recently completed research projects, that intend to be a contribution on the subject¹. The first one is about self-medication practices and the rationalities that underlie them, and shows a new dynamic of lay autonomy, the genesis of which lies in the (reverse) effects of the logic of medicalisation itself. The empirical universe consisted of a socially heterogeneous population of 309 people aged between 18 and 64; these people were aleatorily selected between the workers of an Industrial Company and between the clients of two Medical Centres, all in the Lisbon metropolitan area. In the first phase, the information was gathered from a questionnaire given to all of them and later from 50 in-depth interviews to a group of previously inquired individuals. The second research is about managing the genetic risk of hereditary cancer and its impacts on laypeople's everyday lives, explains the (im)possibilities of lay autonomy in health fields where new genetic technologies and uncertainty reign. The empirical universe consisted of patients at the Gastroenterology Family Risk Clinic at a Lisbon public hospital. The first information gathered was based on 29 questionnaires given to people attending the clinic and later on 15 in-depth interviews with clinic patients who had positive genetic mutation for hereditary cancer.²

Rationalities of self-medication: new trajectories of lay autonomy

Self-medication in western European societies began to increase in the 1970s (WHO, 1988).³ In Portugal, available estimates also point towards an increase on self-medication (Ministry of Health/ National Health Survey, 1989/90;

1 For other sociological works on lay health behaviour already developed in Portugal, see Carapinheiro (2001) and Cabral *et al.* (2002).

2 The first research project was funded by Infarmed (Portuguese Drug and Pharmaceutical Institute) and the FCT (Foundation for Science and Technology) — (POCTI/SOC/36479/99). The second was funded by the FCT — (C/SOC/12079/98).

Table 4.1 Health problems resulting in the most recent self-medication

Health problem	Percentage
Headache	23.3
Miscellaneous pain **	27.5
Flu/cold/cough	24.6
Infections/inflammations	10.0
Digestive/intestinal problems	4.3
Insomnia/anxiety/fatigue	3.2
Skin problems	2.5
Bone-muscle problems	2.1
Others	2.5
Total	100.0

Note: ** including toothache, earache and menstrual pain.

Table 4.2 Forms of self-medication

Access to the medication used most recently in self-medication	Percentage
Mediated self-medication (with remote professional control) :	63.8
"had it at home (previously prescribed by doctor)";	
"recommended by pharmacist".	
Direct self-medication (without remote professional control):	36.2
"recommended by an acquaintance";	
"by advertisement";	
"had it at home (bought with no medical indication)".	
	(100.0)

1995/1996). Generally speaking, it has been estimated that self-medication in western Europe accounts for 30% of total medications taken (Richard and Senon, 1996).

An analytical reconstitution of the socio-cultural conditions leading to an increase in self-medication shows a framework of change in lay perceptions and attitudes relating the body, medications, health and sickness, the genesis of which can be found in the cultural dissemination of medicalisation.

The relationship between these phenomena can be seen in two of the aspects characterising the dominant pattern of self-medication found in the research data.

3 The concept of self-medication is used here in its institutionalised sense, i.e. the use of pharmacological products without medical guidance. For an approach to the ideological content of this concept, including its regulatory and ethno-professional referencing, see Lopes (2003: 26-40).

On one hand, self-medication is used mainly for the treatment of symptoms and sicknesses that were traditionally managed with domestic knowledges and home remedies or that were not given any specific care at all. So, what has changed here is not the field of intervention of lay management — as it still covers the same sphere of health problems as always — but the resources used. As we can see in table 4.1, most of the answers about the health problem that led to the most recent self-medication⁴ fall into the first three items (75.4%). They are problems that until recently tended to be managed with home cures, as we were able to confirm from spontaneous references in the interviews, especially among the older age groups.

On the other hand, most of the medicines used in self-medication were originally prescribed by a doctor or recommended by a pharmacist. This shows a new form of relationship with expert mediation, which denotes a redefinition of the reference systems activated in lay attempts in treatment, as proven below. In order to distinguish between medications obtained with and without any previous professional reference, we have used the descriptions “direct self-medication” and “mediated self-medication”. Although these two practices are not mutually exclusive, as both can be found in the same subjects and the same contexts, “mediated self-medication” occurs more. This was the trend shown in the answers obtained regarding access to the last medicinal product used in self-medication, as shown in table 4.2.

Forms of self-medication

As this brief description of the current pattern of lay treatment initiatives suggests, one of the effects of the medicalisation phenomenon has been the *pharmacologisation* of everyday life; in other words, it indicates the generalisation of the use of medications both in expert and lay intervention as a dominant choice in treatment management. It is through this other phenomenon (pharmacologisation) that the traditional lay autonomy in current management of the body and its disorders has been culturally *colonised* by the logic of medical intervention, emptying the effectiveness of domestic knowledges and the corresponding forms of perception and control of health and illness in everyday life.

It is in this social framework that the lay relationship with medicines has also been redefined.

The population’s more frequent contact with medical care leads to a progressive familiarity with pharmacological treatments and therefore have

4 This was an open-ended question in the questionnaire. The categories in Table I were the result of subsequent data processing. The information gathered in interviews confirmed the same incidences as the categories obtained in the questionnaires.

re-socialised the presence of these therapies in lay health and disease control practices. As a result, it is the current social status of medications that changed: from *rare and esoteric commodity* — *i.e.*, which were unfamiliar and only used exceptionally being symbolically associated with severe symptoms — progressively becomes an *exoteric, common commodity* — *i.e.*, something that is integrated and naturalised in everyday life.

This change was not limited to the relationship with medicinal products. According to Vuckovic and Nichter (1997), the growing accessibility of medications and their generalised use have changed the actual definitions of what is normal or natural in the body's symptoms. While, traditionally, the use of medicines established a frontier between the normal and the pathological, between the natural and the strange, growing medicalisation and pharmacologisation of the body have blurred and changed these frontiers.

This reconfiguration of the social space of medication also marks another parameter of change in the forms of lay dependence on expertise. Traditional dependence on the doctor gradually began to change towards the dependence on medication. People place their hopes of a cure or relief on medicine, expressed by the fact that the use of medication is often the first lay choice to manage symptoms; and also expressed in the importance given to the prescription of pharmaceutical treatments when individuals seek medical care.

Although self-medication, is a domain of particular evidence above the transfer of dependence on the doctor to dependence on the medicine, does not mean that this transfer can be regarded as an expression of lay autonomy with regard the medical sphere. Today, unlike the traditional lay initiatives of therapeutical management based on domestic knowledges and home remedies, self-medication in modern societies is a type of care that is decreasingly independent from the medical system and its logic of intervention (Dupuy and Karsenty, 1974).

However, the conditions for the consolidation of this new framework are not independent from the changes that have also occurred in the traditional cultural patterns of the relationship with the body.

The material and ideological changes that have reorganised the relationship with the body in modernity have also triggered a growing cultural intolerance of any form of physical discomfort. The traditional cult of stoicism in the face of bodily indispositions that gathered social value in a frame of the exaltation of physical resistance and robustness, or in the religious mystique of suffering as a tribute to salvation, has given way to a new attitude towards body uses and usufruct. The body has become an object of hedonistic expression and investment (Featherstone, 1991; Shilling, 1993; Turner, 1996).

The conjugation of the growing corporal hedonism and increasing medicalisation and pharmacologisation of everyday life thus cemented a new intolerance of physical suffering, in the wake of which attitudes and

practices regarding health and illness were also redefined. Enduring bodily indispositions or fighting them with traditional remedies becomes socially assumed as a form of irrationality, when confronted with the growing range of possibilities of rapidly eliminating unwellness offered by medication. The following excerpt from an interview is one of many illustrations of the indissoluble link between corporal hedonism and a new relationship with medicines:

No-one likes pain or feeling ill, do they? In the old days people had to put up with it because they had no alternative. There weren't so many medications. Today it's just not worth it. I'm speaking for myself. I'm no masochist; I don't care to suffer when I know that I can take some tablets and make it better... (20-year-old woman, university student, interview 10)

Among the conditions that have generated this new relationship with pharmacological therapeutics — and around which the determinants of growing recourse of self-medication take form — the intrinsic socio-cultural materiality of the medications themselves must also be considered.

As Geest and Whyte (1989) point out, one of the particularities of medications that immediately distinguish them from other forms of treatment is their concrete nature, i.e. their materialisation in substances. These substances have a dual significance: it is their use that holds the possibilities of a cure or relief and it is also upon them that the treatment is objectified.

Medicines therefore constitute forms of intervention that hold in themselves the *power to treat*, which is not the case with other therapeutic processes. In other forms of therapeutic intervention, the power to treat lies in whoever is carrying out the treatment, as shown by the same authors' example of the surgical procedure in which the power to treat lies in the doctor's skills and not in the instruments that s/he uses. This material nature allows medications to become autonomous from their prescriber, i.e. from the doctor, and to have their effect independently from who is prescribing them.

The emphasis on this autonomy does not mean we should ignore the importance of the *prescriber's effect* on the social construction of the efficacy of a medication, widely demonstrated by a vast theoretic production on the subject.⁵ What we would like to stress is the fact that it is this autonomy that makes the *individualisation or privatism* effect possible, around which different forms of lay access to and use of medications reside.

The effect of individualisation or privatism is shaped in the people's possibility of accessing medication, gaining simultaneously the possibility of

5 For a work of reference on the subject see Balint, (1998 [1956]).

accessing (supposed or actual) treatment without necessarily seeking doctor mediation. Another factor reinforcing this same effect is the written information that accompanies medications in that, as Geest and Whyte (1989) say, this removes the monopoly of knowledge from those who *produced* or *prescribed* the medication and makes it accessible to those who *have* the medication.

It is therefore an object that allows both professional and lay appropriations not permitted by other means of treatment.

The way in which these lay appropriations take place, in the current self-medication framework, leads to another level of analysis focused on the interpellation of the logics that mould everyday practices. It is at this intermediate level that we can devolve visibility towards the way reflexive incorporation of expert references in lay universes is superimposed on a mere passive and mimetic assimilation of means regarding expert action. This is where we find the different combinations between lay autonomy from and dependence on expertise that current forms of self-medication enunciate.

One of the axes for this framework of lecture is the lay pragmatics of managing and controlling the risks attributed to of self-medication.

As mentioned above, most self-medication is done with medications that were originally prescribed by a doctor or recommended by a pharmacist. Their initial recommendation by an expert constitutes one of the lay means of controlling the probabilities of risk while using medicines. This control comes not only from cognitive appropriations of expert recommendations and their instrumentalisation in resources of reflexivity, but also through the effect of *trust* inspired by the initial professional mediation through which the medications were accessed.

Trust in expertise thus overflows the normative limits that it is supposed to institute, i.e. social regulation and the limitation of everyday lay initiatives, and is reactivated in concrete practices as a way of virtual monitoring of the risk that the therapeutic options may involve. The fact that a medication used first under professional guidance is assumed as guarantee of controlling the risk of later lay use, transforms *trust in expertise* into an *expertise resource*.

According to Giddens (1992), in today's societies, trust in expertise in the face of the growing awareness of risk is one of the basic resources that laypersons use to monitor and reduce uncertainties about risk. So, what the analysis of lay management of the risk of self-medication adds to this perspective is precisely the fact that trust in expertise is not limited to the restoration of lay security towards risk but also introduces new conditions of lay protagonism in risk management. This protagonism is reflected in the replacement of *direct expert monitoring* by the possibilities of a *virtual expert monitoring* and by what this brings in the way of new forms of lay appropriation of expertise.⁶

The following piece of interview illustrates the different accounts that express a monitoring of risk both supported by and independent from expert control:

I would never dream of self-medicating with an antibiotic... but if I've got one at home that was prescribed by a doctor and it has not expired and I recognise the same symptoms as those that I had when the medication was prescribed to me... I won't hesitate to use it... [...] Yes, it's still self-medication, but the risk isn't the same as if I was taking a medication that had never been prescribed for me... (man, aged 43, university graduate, interview 34)

This account also shows the use of a system of reference that goes beyond the strict instrumentalisation of trust in expertise. In other words, it also involves cognitive appropriation of expert guidance; and this one is another angle of analysis that it is important to consider.

The growing routinisation of lay contacts with expert systems, as well as the trend towards standardisation of prescriptions for more common health disorders, have generated favourable conditions to the assimilation and cognitive appropriation of expert pragmatics of therapeutic management, as also the references that organise them. More than a mimetic appropriation, the references assimilated in the interaction with professional are redrawn and adapted in confrontation with the practical knowledge produced in everyday life experiences, in which corporal answers to the treatments adopted play a central role. Therefore they are cognitive appropriations that become autonomous from the expert matrix, and that, according to Baszanger (1998), becomes progressively a *constructed knowledge* and not a passively received knowledge.

The mobilisation of this knowledge in self-medication also functions as the legitimisation of self-medication. In fact, it is in the evocation of the very expert options that the validation of lay options is constructed, as shown above and through the following excerpts from interviews:

Just now I said that I didn't self-medicate but that may not be exactly true. For example, I know what colitis pain is like and I know I have to take Pankreoflat, and if the pain is really bad I know that I also have to take a Buscopan, otherwise it won't go away. This is self-medication, but it's self-medication with medications indicated by the doctor. I know what each medication is for, I don't just do it without thinking.... (woman, aged 39, 11th grade, interview 25)

I had tonsillitis all the time for years and years. I would go to the doctor and he would always prescribe the same kind of medication, mainly antibiotics... Often

6 *Direct expert monitoring* is used here to designate the intervention of a professional in the management of a given situation, which in the case of medications is represented by a doctor's prescription or a pharmacist's recommendation for each new situation in which a medication is used. *Virtual expert monitoring* is used to designate the absence of direct professional intervention in defining solutions for a given situation but in which professional solutions proposed in prior situations are adopted.

I didn't even go to the doctor... what for? He was only going to prescribe what I already had at home... (woman, aged 45, university graduate, interview 47)

This means that the routinisation of the population's contacts with healthcare professionals has not only opened new possibilities for lay access to expert knowledge, but has also paved the way for its instrumentalisation in new trajectories of *expertise* and (contextual) legitimisation of everyday knowledge. Self-medication is the domain, *par excellence*, of the social construction of these trajectories of lay repositioning in the field of health. It is a repositioning that expresses new lines of autonomy and enunciates the social dialectics of the reverse effect of growing dependence on expertise.

Rationalities and "genetophilia": new trajectories of lay dependence

While genetics is fundamental in understanding heredity, physiology and human development, its social uses have expanded far beyond biogenetic knowledge. The ascension of the genetic paradigm has influenced the way in which we think about life, health and sickness, human abilities and weaknesses, social problems and blood relationships. However, the significance attributed to genetics and people's understanding of this field of knowledge, are not inherent in genetic or biological structure or knowledge of genes.

When it is said that, potentially, almost all diseases and behaviours can be determined genetically and that knowing about our own genes is the same as knowing about ourselves, not only is this a reduction that identifies the human condition with genetic research, but it also opens the door to an age of medically mediated genophobia and to the imposition of coercive preventive practices.

These issues inevitably impose on the sociological perspective constant questioning of genetics and biology, not only because of the strategic place that it has occupied in the construction of new medical categories, along with medicine, but also because of the practical implications of this new knowledge, thanks to which eugenic practices have abandoned the mists of the past and now however hang over the present and haunt the horizons of the future.

The construction of this framework of reflection, designed to decipher and understand the logic behind everyday management of the genetic risk of hereditary cancer has focused on the immediate subjective experience of this risk and on the practices and representations drawn and redrawn by people, always against the backdrop of a genetically revealed legacy, where the memory of a past haunted by hereditary cancer inevitably mingles with apprehension about the future marked by uncertainty and waiting.

When a disease loses its individual nature and becomes a family disease, and is that is passed down by generations, people want to know if they

have inherited it from their parents and if they will pass it on to their children. The need to reconstruct the past and, above all, to see and plan the future demands the unconditional acceptance of a genetic test. On the first level of analysis we find that the universe of lay practices spurred by genetic diagnosis is conditioned by the fear of an undesired legacy and the responsibility for the health of their children. Here, unlike the risk-takers, socially labelled "irrational and irresponsible", who insist on ignoring and paying attention to their classification as part of high-risk groups, the people interviewed asserted the responsibility and rationality of their health supervision (Greco, 1993).

Biomedical discourse construes the genetic risk as an involuntary, internally imposed health risk and sustains those external forces cannot be called upon this risk. However, the fact that this risk is involuntary does not absolve carriers of genetic mutation from responsibility for their health. Indeed, we can argue that, as the genetic risk is part of the person, the threat is only compensated by people's responsibility for doing something to protect their health or future generations (Hallowell, 1999). From this author's point of view, genetics is not directed at individuals, but at biological relationships and therefore, the risk is, by definition, shared with other biological relatives, so in order to have information about yourself you have to have information about others. This led Kenen (1994) to speculate that one of the consequences of the geneticisation of life may be the mean by which everyone thinks in relation to others. In other words, increased attention to biological ties can have social consequences that can result in the development of an individual feeling of genetic responsibility towards others.

In the same way, Peterson (1998) claims that construing health as a moral fact is not only restricted to discussions of voluntary health risks but also figures in discussions on the genetic risk. The rhetoric of genetic makes people responsible for obtaining genetic knowledge and then trying to modify its risks. According to this author, these conceptions are not only perpetuated by physicians but also by those at genetic risk, who appear here as special mediators of this expert rationality.

I think there are lots of advantages in knowing a lot, and knowing that something is hereditary. We must be aware and prepared for the first symptoms. I didn't find it hard to accept because I knew that it was hereditary and it's one of the things that I've already told my children. Indeed, not everyone is as lucky as us; to catch it in time... It was too late my uncle. When he went, everything had been destroyed... My uncle is dying of it... my father almost the same... We haven't had anything yet because we knew more. If we can face up to it, we have an advantage. We shouldn't regard cancer as the bogeyman, because this is like a defect, a defect. But... if we catch it in time we can have it taken out and so we have to know that we have to face up to it (woman, aged 47, 4th grade, interview 4).

More and more people are faced with health-threatening risks and therefore they feel the need to trust and believe that the power of medical practitioners and medicine is greater than ever. In people with genetic risk, the deposition of high levels of trust is present from the moment they begin their control and management of the risk in the hospital. Knowing the doctors (who treated other family members), their success in previous interventions, contact with new knowledge and technologies in cancer prevention and the permanent attention and availability of the team for their case and their family seem to have a decisive effect on their confidence in the medical practitioners at the family risk clinic and in medicine itself. This social framework not only favours and promotes familiarity with new technologies but also generates, perpetuates and shows new expert dependences.

Another point that emerges from the analysis of these people's reports, worth examining is the importance of the atmosphere and/or conditions of positive acceptance of the risk, which is currently expressed in the tendency for these different technological projects, such as genetics for example, that appeal to the individual and collective desires towards a better future. Their actual involvement in these projects seems to make them members of the "magic roundabout". Every day they experience what they had only seen or heard in films and on television or had only read about in magazines or newspapers. They have become protagonists in the event and in new technological developments, gradually adopting the models of rationality underlying this roundabout that are constantly reducing the importance of the present and transforming the future into a moral imperative, always in the name of health and the "common good". Therefore, according to (Welsh, 2000), people's compliance and wishes also place a decisive role in the selection of priorities in the agendas of genetic risk.

This acceptance and reproduction of genetic rationality can take other forms and become a violent critic towards those who do not share it or ignore it and indirectly blame them for their lack of attention and ignorance of genetic knowledge and the tools that it gives people. Or, according to Keller (1992), there are many problems associated with the geneticisation of health and sickness, though perhaps one of the most insidious problems is in this invitation to socially unrealistic patterns of biological normalcy, threatening not the return to the old eugenics, but the appearance of a new eugenics — the eugenics of normality. Genetic knowledge should then be regarded as capable of providing an unprecedented amount of power to classify people, re-configure patterns of normality and individual freedom.

... people are not very intelligent... they end up here... they end up not going to work, they end up not protecting their family and they end up losing their family, losing everything. They're stupid and not at all intelligent. Then they say it was fate. So... people don't do what they should... People should wise up a

little and see things how they are... take precautions... Only an idiot doesn't take precautions. Don't you doubt it for a second? (man, aged 37, university graduate, interview 7).

This discourse inherent in genetic rationality has been disseminated to such an extent that today we often hear people explaining some weak point or other by saying "It's in my genes". The sentence echoes the fatalism of the old saying "It's my destiny" and also means that the idea of genes as destiny has gained a little of the popular force of astrology. DNA seems to have become magic, with its own identity, history and meaning. Where once there were demons and witches and then neuroses and traumas of youth, there are now genes. Murphy and Luke (1995) even compare the predictive power of genetics to haruspicy, the ancient art of foretelling events by examining animal entrails. It is this integration and naturalisation of genes in the social imagination that sustains not only unconditional support for health geneticisation but also the criticism of the irrationality of those who insist on scorning the possibilities offered by new technologies. And so, contrary to some authors who have said that the fear of having a genetic disease will certainly become generalised (Nelkin and Tancredi, 1994; Shakespeare, 1999) and that medicine and health will be left as mediators of this "collective genetophobia" to come in the next few years, if we focus on the discourse of the interviewees, we can say that we are closer to "expectant genetophilia":

Genetics and these tests are very important to everyone. It's a pity there aren't more for other diseases. They will be the future of medicine and I think everybody should have them. They can prevent some very complicated situations. I think that they are going to get more and more specific and this only helps people. I foresee great developments in this area and I hope that this will help us more and more (man, aged 35, 12th grade, interview 15).

In this cases, and as Wilson (1993: 7) says, "the unknown and the prodigious act like drugs for the imagination; it is enough to try them for the hunger to become insatiable".

In our analysis, we find that for the people at genetic risk of colon cancer, "being at risk" is above all having control over the threat of cancer through prevention and monitoring. This discourse cannot be isolated from the trust in medicine and in the progress that has been made in terms of early diagnosis and preventive measures against this type of cancer. Being at risk, therefore means having time to act (undergo monitoring) and being able to prepare for the cancer. In short, the genetic test "gives" time, and "having" time is having power over the disease and over the fear it inspires.

The uncertainty and waiting, mentioned as common denominators of people at genetic risk of hereditary cancer, are conceived as tools that can be

manipulated in everyday life and that enable them to face and not give up the fight against the threat affecting them. It is on this basis of the risk they carry out and chart their life courses against hereditary cancer. Waiting is capitalised in the management of time, based on the threat of hereditary cancer. This is where we find the fundamental main difference between hereditary cancer and cancer. Through early detection of the genetic mutation, the former gives people an asset that can be precious — time. This time enables them to return to the past and activate defensive, protective strategies in the present and, at the same time, look towards the future. This risk management time, which is also time to “prepare” for the disease, seems to be one of the structuring traits of their everyday lives.

Individual and collective experience of the dangers posed by cancer are a direct result of a century of ideas and practices that did circulate and still do, about the causes and prevention of cancer, where the relationship between time and the disease has remained constant (Aronowitz, 2001). Popular writings, medical writings and public health messages about cancer since the beginning of the 20th century consistently exhorted people to pay attention as soon as possible to any symptom that might point to the disease. This message about delay (i.e. not delaying) has been the central aspect of cancer prevention efforts up-to-date. However, in the middle of last century, the message about delay was joined up with making everyone responsible for detection and not just for responding actively and immediately to suspected signs of cancer. Underlying the interviewees’ reports we can see their understanding of this message, as everyone’s responsibility for their health — the incorporation and reproduction of expert references is a constant in their accounts.

People should be aware of things and the way they are... taking precautions... But I know that I’m in the emergency department and I’ve got people coming in at 8 in the morning and they’re still there the next morning... of course it can get annoying... they are certainly people who haven’t got time to prepare themselves for certain things and then sooner or later... it happens and then they ask, “But how did this happen to me?” people have to realise that health is the most important thing and that, if they don’t worry about it, who else is going to? (man, aged 37, university graduate, interview 7).

The efficacy of early diagnosis depends on the quality of the information provided and, above all, on the behaviour of each player and the way he recognises himself as involved in the production of medical activities and therefore also being responsible for his own health, Pinell (1992). The specificities of the diagnosis (of cancer) are such that the effectiveness of medicine becomes directly dependent on the behaviour of the “the responsible” people, even if the patient regarded as the active subject has no place in the universes of medical discourse other than which he expects — a

patient. Medical discourse thus includes, as a condition of its practical efficacy, a new parameter — the patient player or the potential patient — an essential collaborator in state-of-the-art medicine. The patient now occupies a dual position. He belongs as an agent in the medical production process and, at the same time, as the object of medical practices.

The potential patient finds his place as the doctor's helper, playing the role of the sentinel who warns the doctor. This is why the training of this "professional patient", is important, with all that this involves in terms of transforming everyday lives so that, as Pinell (1992: 273) says "a frivolous, shy woman metamorphoses into *homo medicus*, the ideal medical subject capable of understanding her body as a clinical object".

Breaking down medical practice into a succession of tasks, this project isolates a basic task, repairing the suspect symptoms and forgets that the signs that the potential patient should recognise are signs built with reference to an object-of-medicine-body", which has also been built. The symptoms are therefore not identifiable and meaningful unless related to overall knowledge about this "object-body", to which the patients do not have access. In addition, the perception of the signs that the "object-body" manifests assumes an exterior position (a condition for objectivity) in relation to the subjective body, which the patient is unable to achieve (Pinell, 1992: 274).

The main meeting point of clinical practice with the application of the revolutionary discoveries of genetics and molecular biology, cancer emerges as a matchless vector of innovation and transfer of knowledge. With oncology, a new form of medicine has been drawn, which is increasingly dependent on the progress of technology and requires the combination of specialised skills of all kinds. Although hospitals are still the most common place for practicing medicine, its primary objective nowadays, is the draft and or draw up the scientific knowledge about disease, meaning that the art of curing metamorphoses into the science of diagnosis, supervision and control.

The interviewees conception refer directly to the routinisation of contacts with this "modern" medicine, that is constantly built and rebuilt through the unstoppable ongoing technical mediation of recent years, in which they experience, assimilate and reproduce the latest powers and knowledge. The next excerpt about check-ups is an example.

Basically, we accompany all their work step by step... We see what they see... Of course they explain it to us and in the end we begin to enjoy it. I'm always looking at it and it doesn't bother me at all. These new techniques are an example all the innovation in this field — and there has really been a lot (man, aged 27, 12th grade, interview 9.)

However, according to Rose (2000), what is at stake is the controversial commitment to the future, to which a large amount of resources, social attention

and hope in genetic knowledge and genetic tests have been devoted. In this conception, early genetic detection by means of more accurate and biologically tangible contributions will eliminate not only the risk but also the cancer. Nevertheless, what remains today is the existence of a huge gap between the diagnostic capacities and the therapeutic possibilities.

However, in spite of the scepticism shown by some experts, it seems inevitable that promises offered by genetic knowledge will be accepted sooner than many people thought. In fact, when referring to health, obstacles are set aside, doubts are relieved and criticism silenced (Beck-Gernsheim, 2000). We cannot argue against health, particularly in a society where it emerges as the supreme value. According to the same author, health emerges today as a cultural prerequisite for the cultural acceptance of genetic technology. As Richards (1993) points out, the information obtained by genetic detection of individual risk factors is the guideline that models each person's lifestyle and so, as the information comes in, preventive care will reinforce his or her power, as an element essential to each person's self-management.

It was my health that was at stake and the possibility that I was being given of doing something for it... That's why I agreed immediately to do the test. When I heard that I could have the test, I agreed straight away. I didn't think twice... You can't play around with your health... We should do everything we can for our health. Of course I took the doctors' advice. It was only a blood test... it was easy. Of course, after that, when I went to find out the result, I was a bit scared... but deep down, with my family history, I was expecting it. So I got there and it was confirmed. I won't say that it wasn't hard hearing the news... But at least now I can do something for my health, can't I? (woman aged 42, university degree, interview 1).

In the realm of a new technology that announces the immovable promise of health, morality becomes obsolete all taboos that were valid until now tend to be overcome. In secularised, individualised society, like the one we live in, health is the greatest value, positioning itself above all others and dethroning them. The centrality of health and prevention (based on individual responsibility and the delay message) in the practices and conceptions of genetic risk carriers, emerges as a reference sustaining, modelling and rationalising these people's everyday lives. As Kitcher (1996) points out, genetic innocence seems to have given way to imagination, where individual paths can be planned, controlled or eliminated instead of just being lived.

Conclusions

As the two thematic analysis demonstrate, the social process of growing medicalisation of everyday life in this phase of modernity includes a new lay involvement.

While this involvement takes different forms — i.e. as new forms of autonomy or dependence on expertise — their trajectories show them to be vehicles of mediation and enshrinement of expert rationality. In fact, in both self-medication and genetic risk management, the reflexivity that forms lay options rarely excludes, in their constitutive references, the resources and solutions made available by expert instances

The conditions that alternate the logic of dependence or autonomy from expertise found in each of the thematic analysis can be systematised around two central dimensions.

One of these dimensions has to do with the different possibilities of *direct lay control* over mobilisable resources in every day health management.

In the case of self-medication, the body becomes an instrument for monitoring the efficacy or inefficacy of the solutions adopted, an assessment based on and legitimised by the body's own responses. We can say that the interior of the body goes from an opaque entity only accessible to the expert eye, to something transparent, with legible exterior signs. On the other hand, the material resources of actions — medicines — are a type of medical technology that, due to its nature, allows lay cognitive appropriations. As substances that carry within themselves the "*the power to treat*", medication allow that, within the framework of growing medical routinisation of prescription of drugs — and therefore of growing lay familiarity with these forms of treatment —, the social frontiers capable of inhibiting lay appropriations (cognitive and practical) of expert resources are diluted.

In the management of genetic risk, the nature of the medical technologies used complexifies their autonomy and of those who prescribe and perform them; lay access to these technologies constitutes itself as an immediate dependence on expert agents. On the other hand, in this context the body itself ceases to be a monitoring and lay control instrument. Bodily disorders do not take the form of signs accessible to lay perception; they become invisible to the common perception and are only accessible to expert readings. In this context, present and future uncertainty plays a decisive role in reinforcing dependence on expertise. It is a dependence that acquires a double sense: the obligation to be vigilant, a moral imperative imposed by the ideological framework of new biogenetic knowledge and the absence of a of lay knowledge patrimony, that enables direct cognitive participation in this same vigilance.

The social significance of the *uncertainty* and the way in which it is managed represent another dimension of lay dependence and autonomy. It is the specific framework of this uncertainty that redefines the instrumentality that trust in expertise has in each of the portrayed health management contexts.

In the context of self-medication, trust in expertise is converted into lay recourse of expertise. As we have seen, it is in the reflexive appropriation of

expert options that uncertainty as to the risk, or as to the inefficacy of the medications used, is controlled. It is controlled by initial medical mediation in lay access to medicines (trust transformed into a resource) and by direct monitoring of the risk in reading bodily responses.

In the management of genetic risk, the uncertainty manifests another plurality: on one hand, the opacity of the signs of risk, on the other the undetermined time frame in which the risk inscribes itself. The lay impossibility to exert any direct practical control in this context, reinserts strict trust in expertise as the antidote for facing the misfortunes of nature. The ambivalence between scepticism and trust in expertise swings in favour of trust, when trust is the only strategy available for managing the imponderable.

In an age where health has become a moral imperative, where the cultural dissemination of medicalisation dominates and new technologies and sciences emerge to redefine both the new ideological framework and the margins of the intervention of medicine, the forms of lay involvement are also being redefined and new margins of autonomy and dependence are being accentuated, nevertheless limited by available expert knowledge. It is precisely this new emerging lay involvement that explains a change relating traditional social frameworks in the field of health. When the rationality underlying the new expert ideological framework is imposed, strategies (future research) must be undertaken to restore visibility to all the forms of lay approach to health consumptions and the changes taking place every day in this universe.

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Drug addicts

Socio-psychological trajectories and problematic ties

Anália Torres, Ana Marques Lito, Isabel Sousa, and Diana Maciel

Introduction

Drug Addicts: Trajectories, Socio-Psychological Profiles, Family Patterns and Mental Processes is the general title of a study crossing sociological and psychological perspectives trying to understand and explain the complex reality of drug addictions¹. This interdisciplinary approach and a specific framework analysis defining different dimensions were drawn in order to explain the social, psychological, familial and individual vulnerability factors that may contribute towards persistent trajectories in drug addiction.

The main aim of the study was to interpret social regularities and family profiles and systematically compare the social, family and individual trajectories of drug users and non-users. This was achieved by resorting to different research techniques. We tried to understand why some people take drugs and others do not and more specifically to find answers to the following questions: Why do most young people experiment drugs without becoming dependent, whereas others move from experimenting, to abuse and addiction? Why is it that siblings in the same family background have different behaviours regarding drug use? Finally, why are there so many more men than women who are drug addicts?

An extensive analysis of the database of the CAT (Centre for Drug Addicts) in Restelo (Lisbon) was the first empirical approach to the reality under study.² This led to the identification of social and family regularities

1 Developed within the scope of the project *Drug Addict: Trajectories, Socio-Psychological Profiles, Family Patterns and Mental Processes* financed by FCT – Foundation for Science and Technology via a public tender and international jury within the Science, Technology and Innovation Operational Programme with reference no. POCTI/SOC/45879/2002.

2 1,000 clinical processes of individuals who sought the public drug addiction support network, such as the CAT in Restelo (Lisbon), were randomly selected. These individuals

and consumption profiles that enabled us to typify the situation of drug addicts. These results were compared to the data on the Lisbon and Tagus Valley population and differences in the years of schooling, family situation, marital relationships, as well as family structure between the two populations were detected.³

The second phase of the study involved conducting a telephone questionnaire with a sample of users from the CAT database.⁴ This telephone contact was done as a follow-up to those who had been attending CAT. Our main goal was to identify changes in the life trajectories from the moment drug addicts were attending CAT until the moment of the interview, their quitting or continued use of drugs, the treatments they had had and pinpointing problems related to family, occupational and social insertion which they might have experienced. The comparison of this information with the results from the previous CAT data base provided important information about the trajectories of drug addicts.

Based on contacts made during the follow-up, a set of in depth interviews conducted with two different groups were analysed in the last phase of the research: one group of individuals with a history of drug addiction and another group including the respective siblings who had not been dependent on drugs. When siblings were not available we interviewed drug addicts' close friends or partners. This procedure enabled us to make a systematic comparison of the social conditions, family profiles and mental processes of addicts and non-addicts in an attempt to find differentiating factors in their life trajectories so as to build a typology.

In addition to the theoretical question and clarification of the analysis model of our research, the text also presents the results of the database and follow-up and goes on to outline some of the conclusions reached from the interviews with drug addicts and their non-addicted peers.

The problem issue and analytical model

Most scientific analyses now seem to agree on the need for a multi-dimensional and multi-disciplinary approach to drug addiction that tends to be

were on the CAT computer database and hence it was possible to analyse 885 cases — the only ones with relevant information for the research.

3 In order to carefully compare the data for the drug addict population with the data for the Lisbon and Tagus Valley population, we analysed the results from the 2001 Census from the Statistics Portugal for the population aged between 15 and 49 living in the Lisbon and Tagus Valley Region (Nuts II) as these were the areas of residence and ages corresponding to the population in our sample.

4 We selected randomly from the CAT's database 300 cases; we tried to contact them all but it was only possible to trace 121. From this group we obtained relevant information for 114 individuals.

reflected in Olievenstein's formula: drug addiction is an encounter between a person, a product and a socio-cultural moment. This sets aside perspectives that attribute magical properties to chemicals *per se*, or consider biological disposition or even specific personality pathologies to be decisive to explain drug addiction. It also distance itself from views that tend to isolate drug addicts from the family, social and cultural environment in which they are inevitably found and from which they emerge. As Morel *et al.* underline, a biological individual is constructed solely on and through his/her interaction with his/her exterior world (Morel, Hervé and Fontaine, 1998), and it is therefore essential to find how perspectives of this multi-factorial reality intersect.

A number of authors today also agree on the need to develop approaches that favour sociological as much as psychological dimensions (Amaral Dias, 1979), that identify psychological, family and social vulnerabilities or weaknesses (Morel, Hervé and Fontaine, 1998) or relational risks (Farate, 2001) in individuals' trajectories so as to overcome supposedly inexorable determining factors or simple dichotomies — consumption is an option or fate — when explaining the different interactions and factors at stake in drug addiction (Ribeiro, 2001).

These disciplinary cross-references were accounted for in the analytical model and the theoretical framework outlined for the research. As stated before, the aim was to identify the social processes, the family relationships, the aspects of the individual trajectory and the mental processes to explain the paths that led to drug addiction. Particular focus was given to two main processes: adolescence and gender which are themselves dimensions of analysis.

It seems undeniable, and there is in fact consensus in scientific literature, that the identity and identification transformation processes in adolescence play a central role in behaviour that may or may not lead to drug addiction (Amaral Dias, 1979; Morel, Hervé, Fontaine, 1998; Morel *et al.*, 2001).

From a theoretical and analytical standpoint, less attention has been given to another undeniable factor, namely that the great majority (nearly always about 80%) of addicts are men. Our research goes beyond simply verifying this disproportionate gender difference and has made it the central object of analysis. What is there in the male growth processes that can help explain the paths taken by addicts? We constructed our interview script with a view to testing this research hypothesis. Some theoretical approaches will be discussed showing how gender "acts" through social relationships and how it can be particularly relevant in this case. Specific problems involving the position in relation to hegemonic masculinity (Connell, 1987, 2002; Kimmel, 2000), the affirmation of young males within their peer group and the influences permanently coming and going from the peer group to the family relationships, the problems and processes both of identification and autonomy of adolescents, the role of the parental figures both of the mother and the father, among others, are subjects of in-depth analysis in this study.

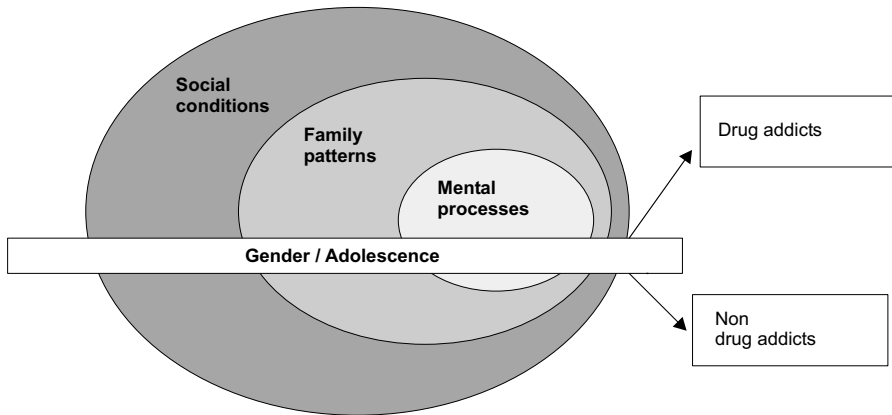


Figure 5.1 Analytical model

The analytical model shown in figure 5.1 was developed based on these assumptions.

Our different approaches and levels of analysis deserve further explanation. At a first level, we gathered information about the social origins and trajectories of drug addicts in order to shed light on their living conditions, their social relationships with their peers and family, their reference groups and their gender identity. Although we could find out that drug addiction is transversal to all social classes, we could also observe that the social context of origin leaves specific marks on the trajectories of drug addicts.

In fact, accounting for the relation between expectations and objective opportunities and focusing in particular on their educational trajectories and real opportunities to enter the labour market; we could easily conclude about the diversity of these youths' lifestyles, and the complexity of the contexts in which the substances and their life stories cross (Pais, 1993, 1999; Fernandes, 1998; Vasconcelos, 2003).

Social conditions such as poverty, for example, give certain drug consumption trajectories great visibility because meagre financial resources make addicts rapidly become involved in criminal activities in order to feed their dependency, sometimes leading to imprisonment (Torres and Gomes, 2002). On the other hand, when certain continued and persistent trajectories of addiction occur in groups with better financial resources consumers are able to maintain an apparently integrated life hiding at first glance their addiction habits (Fernandes and Carvalho, 2003).

Values that praise, in contemporary societies, immediate pleasure and consumption, and the way social actors personal experiences' adopt and reflect about them were also considered conditioning factors that might explain drug abuse (Torres, 1994). However, specific generational and group influences and effects must also be taken into account. In fact, the practices and meanings given to certain drugs are different, as are the effects of their consumption in specific generational and social contexts.

Cocaine consumption among certain elite in the 1970s and 1980s in Brazil (Velho, 1998) or in Portugal (Fernandes and Carvalho, 2003) seems to take on a different contour to that given to heroin consumption by youths in urban and suburban areas when the drug became more evident in Portugal. Drug addicts often allege that they were unaware of the drug's destructive effects at the time. The situation 20 years later has changed and there is much less ignorance on the matter today thanks to the frequent mention of drug addicts and the harmful effects of drug addiction in the media.

The appearance of new, "clean" versions of drugs that seem far removed from the degraded spectacle of the former (and also current) disreputable places and neighbourhoods where they were used, once again reinforces the need to assess the different contexts, lifestyles and products (Henriques, 2002; Fernandes and Carvalho, 2003). The fall in the price of cocaine as well as the strategies used by dealers is also known to have changed access to cocaine and even some consumption patterns (Chaves, 1999).

In other words, it is essential to take into account that there are generational effects which influence the actual public image of drugs and their effects, and that these factors interfere in the way in which different generations of youths and teenagers see risks and drugs. The database results show the prevalence in the search for treatment by heroin consumers (90% of the CAT users); however, the interviews also identified young people belonging to distinct periods and contexts that went from those who began taking drugs in the 1980s to those who started ten to fifteen years later. It is therefore possible to get a better picture of the trends ranging from the demand for certain substances to problematic addiction.⁵

The second level of analysis focused on the processes of socialisation in the family context so as to understand the relationship between models or types of family, both in terms of marital (father-mother), and parental (mother-children and father-children) relationships trying to assess the possible effects on youths' representations and practices.

The hypothesis was posed, and indeed later confirmed, of the negative effects of the traditional model that Parsons characterised as a strict (and

5 According to EMCDDA problem drug use is defined as "injected drug use or regular prolonged use of opiates, cocaine and/or amphetamines" (EMCDDA, 2003: 18).

rigid) division of the roles played by gender: on the one hand, affection — an expressive task performed by women and, on the other hand, obtaining resources — the instrumental job of the family breadwinner played by men (Torres, 2001). These negative effects reflected for example the problems arising from excessively close and binding relationships between mother and child, with the consequent difficulties of autonomy (Amaral Dias, 1979), and a relationship that is sometimes distant, peripheral or inflexible and authoritarian of the father that inhibits real and positive identification.

Although families are very important structures for socialisation, relationships and interactions, it must be stressed that there is no typical dysfunctional family that “produces” drug addiction and it is also impossible to analytically isolate the family as a closed system that is immune to outside contexts. An attempt has therefore to be made to take into account the consequences of the changes in the family context in recent decades and especially to the greater relevance given today to affective and psychological dimensions of relationships. The modern valorisation of individual rights and feelings and the greater equality among family members means also more demands on relationships and on negotiation capabilities. These changes have made the parent’s job more complex and demanding and sometimes with a lack of reference models suited to the new contexts.

The different modalities and the functioning of the family were also the focus of analysis as several authors have pointed out, and was mentioned above, there is no profile or uniform family model common to all drug addicts (Ferros, 2003). However, many agree with the idea that within drug addicts families dysfunctions are frequent in relationships, with parental behaviours and patterns of family interaction swinging between periods of great strictness and others of intense agitation, erratic and tough disciplinary practices (Minuchin and Fishman, 1981) or that they are strongly opposed to change, chaotic and disorganised (Block, Block and Keyes, 1988 quoted by Ferros, 2003); or that they are poor family relationships and displaying negative affection when solving problems (Hops, Tildesley, Liahenstein, Asy and Sherman, 1990 quoted by Ferros, 2003).

Some studies also refer to a negative perception of parents’ relational attitude which Farate (2001) considers one of the most important factors of “relational risk” and for regular consumption of psychoactive substances; others refer to the constant competition between the drug addict and the other family members and the eternal conflict of emotions and affections, both positive and negative, which Coimbra de Matos (2003) called “a relational game”. Others, such as Flemming (1995), highlight the fact that these families find it difficult to handle the separation/individualization process of its members.

With regard to educational styles, communication and interaction patterns, there are authors who describe these families as extremely conflictive, authoritarian, critical of their offspring, lacking intimacy, emotionally isolated

and lacking pleasure in the relationship. They are also prone to depression and stress with parents joining forces against their child. There are often sexual conflicts between the parents. On the other hand, Kaufman characterises communication in these families as tending to be excessively rational, with immense difficulties in expressing intimate feelings, while Relvas considered it unclear, ambiguous, sometimes excessive and others practically non-existent (Kirschenbaum, Leonoff and Maliano, 1974; Kaufman, 1981; and Relvas, 1998 quoted by Ferros, 2003).

Much attention has also been given to the influence of siblings' drug use, whilst members of the same family, as it is a long-standing relationship. A literature review showed diverging results. According to some authors, fraternal and peer influence is more powerful in increasing the risk of a younger sibling resorting to drug use than that of parents (consumers). But Penning and Barnes uphold that the influence of peers is stronger than that of siblings (Brook, Whiteman, Gordon and Brook, 2001; Needle, McCubbin, Wilson, Reyneck, Lazar, Mederer, 1986; Penning and Barnes 1982 quoted by Ferros, 2003).

The third level of analysis is centred on the psychological approach of the individual in terms of mental processes during the period of adolescence and related to the problem of drug addiction. The individual's psycho-sociological transformations must be stressed, as must separation and individualisation, grieving for parental images, the identification and identity processes, autonomy and dependency, primary narcissism and other matters related to self-esteem and finally, the processes of mental pain and intolerance to frustration.

Several studies conducted in the last twenty years confirm, like this research, that the first experiences with drugs occur on average between the ages of 14 and 16 years and the move to narcotics (i.e. generally heroin or cocaine) comes a little later, between 16 and 20. Thus, the use of drugs begins right in the middle of adolescence, i.e. during a phase in life when the individual is particularly fragile and confused and ready to accept anything that will make him/her feel better, thus avoiding the hardest aspects of his/her path to maturity. The first experiments with legal or illegal substances tend to take place in two phases: first comes the experience of "inebriation" (whether using alcohol, cannabis, or another substance) and then the problematic consumption may begin. Most stop during the first phase (Morel, Hervé, Fontaine, 1998). However, if the discovery of drugs coincides with a series of deceptions related to difficulties and deeper problems of adolescence or traumatic experiences, young people may easily seek anaesthesia or peace via drugs (Olievenstein, 1996; Torres, Sanches, and Neto, 2004).

Adolescence is a phase in human development when fast physiological growth is accompanied by much slower maturing psychological processes required to deal with the recently lost childhood and with puberty. It is the

time when new ways of object's relation are created, when new goals are defined and it is also a period in life demanding mourning and renouncement.

There is no normal adolescence without moments of depression connected to feelings of loss and anguish of abandonment. An adolescent needs, for example, to build a sexual identity that will guide him/her when choosing the object of his/her love and to mourn the self-help that used to be the parental self: mourning for the mother-refuge, mourning for the dependency and safety that she gave him/her. This is the condition for his/her autonomy, in other words, it is a period in which the individual disinvests him/herself from the ties of narcissistic dependency which connected him/her to their parents and thus opens the possibility of being alone and of organising the individualisation/separation processes positively (Blos, 1967; Amaral Dias and Paixão, 1986; Amaral Dias, 1988, 1991; Morel, Hervé, Fontaine, 1998). Between the normal and the pathological, everything plays a part that depends on the capacity of the adolescent's self to deal with this mourning process and to overcome the depression associated to it.

Therefore, the source of security represented by the parental self must first be present and then interiorised during childhood and throughout adolescence. This interiorisation creates the limits that enable the psychic system to take the place of parental figures (Morel, Herve and Fontaine, 1998).

The interviews with drug addicts and their non-addict peers were analysed to determine whether or not this "interiorised source of security" could be found and if it was possible to distinguish adolescents who experiment drugs without getting addicted from those who become drug-dependent. As Amaral Dias suggests: "If the adolescent has a good chance of experiencing and even finding certain pleasure in his/her own fantasies, beyond the inevitable conflicts of this period, then it is likely that the immediate satisfaction produced by drugs will not modify his/her psychological system. On the other hand, if mental frustration is predominant it is likely that the new path opened by the drug use will become dominant" (Amaral Dias, 1979).

In the same way, an immature psycho-affective and mental state can be observed in drug addicts where depression is a dominant feature (Coimbra de Matos, 2003). They tend to be individuals who do not find satisfactory identification models that enable them to cope with emotional conflicts. Consequently, they reveal important narcissist failures, feelings of emptiness, self-depreciation and anguish. Thus, drugs become a false protective shield against suffering and what Freud called "destroyers of worry" (Freud, 1929, quoted by Morel, Hervé and Fontaine, 1998). Although psychotropic substances may initially be for recreational use, consumption often and quickly is maintained because of the need to escape from reality and because of the amnesic pleasure they provide; as a result, the addict is capable of evading the difficult aspects of his/her relationship with life and the drug works as a mediator in relationships with others (Morel, Hervé, Fontaine, 1998).

The way a person deals with mental suffering is also important in order to understand the situations that caused the pain. Instead of trying to change mental pain through understanding it, drug addicts tend to resort to primary defences to avoid suffering (Dubinsky, 2000) drug use functioning thus as a compensation of the emotional system in particular for feelings of anger, guilt, shame and abandonment.

It is also along this line of thought that McDougall concludes that drug addicts take drugs in an attempt to free themselves from unpleasant emotional states (McDougall, 1996, quoted by Ribeiro, 1995). In fact, every psychoactive substance holds promises of pleasure and relief from suffering, albeit temporary. Consequently, once the effect is over, the return to "earth" is melancholic, uninteresting and meaningless. It is at this meeting point between the individual's life story, life events and psychic representation that the "revelations" produced by the psychotropic experience are generated. This is the starting point of addiction: the experience and act of drug consumption overwhelms the individual and an unstable relationship with the world starts. A false inner security demands repeated consumption to prevent more and more ups and downs. Total investment in the product acts as an "anti-thought" and leads to a narrowing of the individual's capabilities as a subject. This process is simultaneously the cause and the effect of the difficulty of being (Morel, Hervé, Fontaine, 1998). As Amaral Dias says (2000), it is at this point that the addict faces once more, and more and more, the need to escape that pain thus restarting the vicious circle of drug-taking.

It was a challenge for the present study to link the different analytical levels described, as well as the sociological and psychological approaches. Despite the complexity of the task, we believed the risk would prove useful. Moreover, the exercise we tried to achieve in this research converged with the persistent need for a holistic perspective that takes into account individuals' biological and psychological dimensions and, above all, their socio-cultural environments (Romani, 1999).

In recent years, progress has been made in this field of scientific research both internationally and in Portugal. Slow but decisive progress. In fact, as has been pointed out, intervention prevailed over reflection for far too long which partly explains the lack of success in the so-called fight against drugs (Agra, 1993, 1997; Miguel, 1997; Romani, 1999; Brochu, 1997).

More recently, extensive research has contributed to a better understanding of the major trends in the evolution of the drug addiction phenomenon (EMCDDA, 2003; IDT, 2003), and at the same time, contributions from qualitative research have been more and more valued. In Portugal, pioneering work carried out under the direction of Cândido da Agra has contributed to explain Portuguese experience (Agra, 1993, 1997), in particular regarding the drug/crime relations. Ethnographic and abundant qualitative approaches were also fundamental references and sources of inspiration for this study

(Fernandes, 1998; Valentim, 1998; Chaves, 1999; Vasconcelos, 2003). Other extensive studies have also been equally useful and relevant (Balsa *et al.*, 2001; Torres and Gomes, 2002). Furthermore, the Journal *Toxicodependências* (Drug Addictions), published since 1995, bears witness to the increase of scientific research in this area.

The following text includes global results from three methodological tools applied in this research: first, from the CAT database in Restelo (Lisbon), secondly from the follow-up, and finally, from the preliminary results' analysis of the interviews. All along the presentation of the findings, we try to answer the main research questions, raised in the beginning, and also to propose some of the concepts that emerged during the research process and questioning. This is a first approach where we explain the overall path taken by the study in its various phases. In other written texts we will have the opportunity to give a more comprehensive answer to some other questions, especially to those related to the analysis of the interviews.

The social conditions, gender and family profiles of drug addicts: a comparative analysis with the Lisbon and Tagus Valley population

An analysis of the information from the CAT database allowed the identification of social regularities, family and consumption profiles that led to a typification of the drug addicts' situation.⁶ These results were compared with the data about the Portuguese population of the region of Lisbon and differences between the populations were identified in education level, occupation, marital status and family structure.⁷

Most drug addicts are young males

The overwhelming majority of drug addicts who sought help at the CAT were men.⁸ Though several studies have noted that drug users are predominantly male (IDT, 2003; EMCDDA, 2003), not many have tried to explain this trend.

6 The information on the Restelo CAT users was obtained from a database on computer, through which we were able to select the pertinent variables for our analysis. This information was extracted in 2003, when there were 3,784 individuals on the database, 1,000 cases were randomly selected, and we managed to obtain pertinent and complete information from 885 users. The information obtained regards CAT Center's attendants from the 1980s on. However, there are more individuals on the database from the 1990s on and therefore these cases are overrepresented.

7 We checked the 2001 Census from the Instituto Nacional de Estatísticas (Statistics Portugal) for the population aged between 15 and 49 living in the Lisbon and Tagus Valley Region (NUTS II) as this was the area of residence and age corresponding to the population in our sample, in order to make a careful comparison of this data with that of the drug addict population.

8 Of the total number of individuals: 83% are male (734) and 17% are female (151).

Our first hypothesis is that the disparity in the consumption rates of the two sexes can be explained by the gender asymmetries established during socialisation, especially during adolescence as mentioned above. The analysis of our interviews will give a clearer idea of whether or not the trajectories confirm this hypothesis.

It was heroin addiction that brought the vast majority (90%) to the CAT Center.⁹ According to Balsa *et al.*, (2001) “life-long consumption” of heroin and cannabis in Portugal is above the European average. Heroin is the main illegal substance involved in problematic use in Portugal and the first drug among those in search of treatment. Nevertheless, heroin has become less visible on the national market in recent years and also in relation to the number of arrests and amounts seized, as well as in terms of the legal consequences for consumption and/or trafficking. In contrast, cannabis and cocaine have progressively gained visibility both in the legal context and on the national market, registering the highest number of arrests and amounts seized in the last few years in Portugal (IDT, 2003).

Moreover, tracking this trend, the consumption of heroin among school-age children declined while the consumption of cannabis increased. Despite being less prevalent than cannabis, there has been a discernible rise in the consumption of alcohol, cocaine, ecstasy, hallucinogens and LSD within the school environment (IDT, 2003).

As already referred, drug addiction is a bio-psychosocial process that normally begins in adolescence. Indeed, on average, the population attending the CAT in Restelo had begun using cannabis at the age of 15 and heroin at 20, although most (54%) said they had started on heroin before they were 19, as seen in figure 5.2. In this case, there are no significant differences between men and women. The average age at which these individuals turned to the CAT for help was 27. However, as the follow-up will show more clearly, the age when a drug addict normally asks for help and the length of time they take drugs depends on several conditioning factors and especially on the respective social condition, as we will see.

Although drug use is normally associated with young men, in recent years there has been a steady rise both in the average age of drug addicts and in the number of women drug users who have turned to the CAT in Restelo.

The ageing of the drug addict population first seeking treatment reflects a trend that has been noted on a national and European level (IDT, 2003; EMCDDA, 2003). Drug addicts seeking institutional help later in life may be related to the increasingly complex and diverse schemes for obtaining money which means they take drugs longer. This trend may also indicate the effect of

9 Of the total number of heroin users, 56% smoked it, 27% injected it, and 17% used both methods.

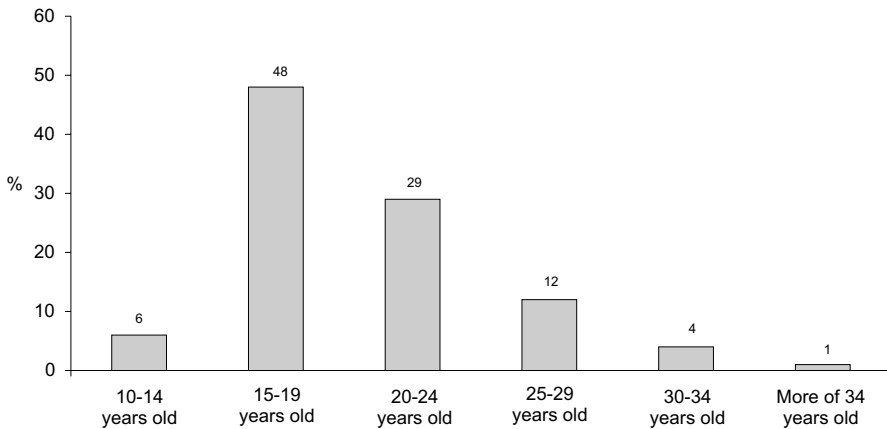


Figure 5.2 First experiences with heroin, by age group

Source: CAT Database in Restelo.

the recent increase in the number of institutions treating drug addiction suggesting that these individuals had already tried detoxification but had relapsed, as we will see in the follow-up. The rapid increase in the number of institutions for drug addiction has also contributed towards more trafficking medication on an illegal market, thus perpetuating the relationship with drugs. To finish, it would be interesting to understand whether the increase in consumption among women is related to the effects of greater gender equality both in terms of family socialisation and juvenile practices. These hypotheses on gender and adolescence will be examined by comparing the life trajectories of those interviewed.

Most drug addicts have low education and are unemployed

Most of those who sought help at the CAT had no more than the 9th year of schooling (76%) which may be indicative of the trend to drop out of school due to drug use and addiction. Indeed, 2% never went to school, 14% only studied up to the 4th year, 34% up to the 6th year, and 26% finished the 9th year. On the other hand, 17% completed the 12th year, and 7% are either in or have finished higher education.

A comparison of these figures with those for the population of the same age group living in the Lisbon and Tagus Valley Region (LVT) reveals that the drug addict population has less schooling. As we can see in figure 5.3,

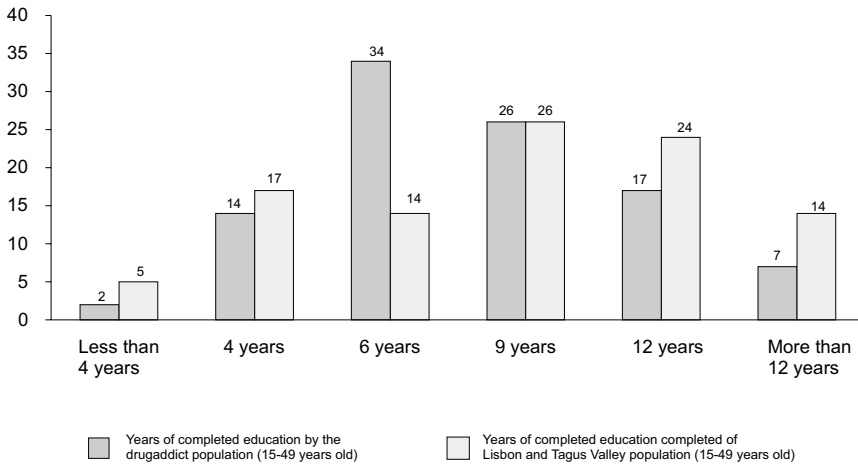


Figure 5.3 Years of education completed by the drug addict population and by Lisbon and Tagus Valley population (%)

Source: CAT Database in Restelo and National Institute of Statistics (2001), 2001 Census.

although the levels of illiteracy and the number of people who only finished primary school are not so significant, the figures for 12th year and higher education in the Lisbon and Tagus Valley population are higher. We also noted that young female drug addicts are more educated than their male counterparts in terms of secondary school and higher education; this is also the case with non-drug addicts.

In light of these results, it makes complete sense to focus attention on the relationships that can be established between the school trajectories, experiences within the school environment and relationship with peers, levels of achievement or non-achievement, premature school-leaving, expectations and frustrations, and more or less problematic drug use.

When they were attended at the CAT, most of these individuals were unemployed (52%). These figures are very different from those of the Lisbon and Tagus Valley population where the majority of the same age group are employed (figure 5.4). The fact that these people are unemployed indicates that they had previously had a job, which does away with the idea that drug use is associated with being inactive or even idleness. It is admissible however that unemployment among addicts is exactly due to the fact that they have already been through the vicious circle which begins with lack of concern with and dropping out of school, an early entry into the labour market to sustain addictions and then reaching the end of the line in which drug use is incompatible with holding down a job.

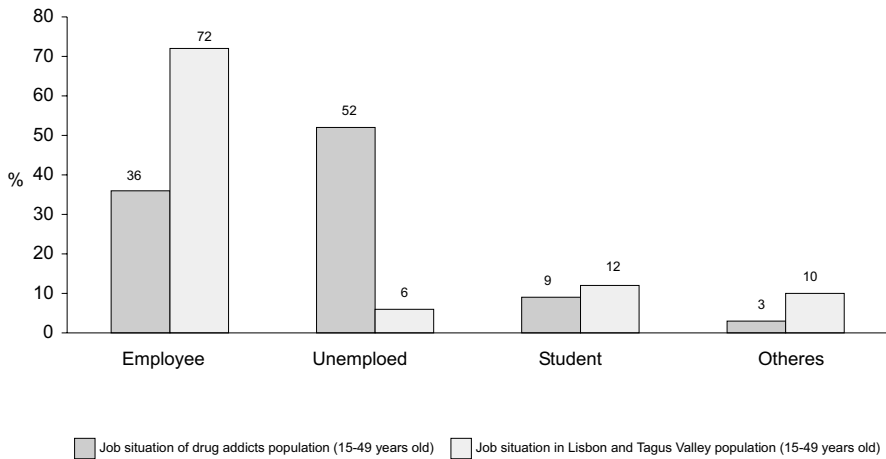


Figure 5.4 Job situation of the drug addict population and of the Lisbon and Tagus Valley population (%)
Source: CAT Database in Restelo and Statistics Portugal (2001); Census, 2001.

Table 5.1 Occupation of the drug addict population and of the Lisbon and Tagus Valley population

Job category	Drug addict population (15-49 years old) (n=842) a) %	Lisbon and Tagus Valley population (15-49 years old (n=1.472.607) %
Company managers	1	8
Intellectual jobs	3	11
Intermediate professional technicians	11	13
Administrative employees or similar	11	14
Service employees and salespeople	23	16
Laborers or similar	36	24
Unskilled workers	15	14
Total	100	100

Source: CAT Database in Restelo and Instituto Nacional de Estatísticas (Statistics Portugal) (2001); Census, 2001.

It should also be stressed that 36% of these individuals had a job when they went to the CAT Centre; this may show that for some individuals it is possible to work while having drug addictions, thus concealing drug abuse from a number of people, as some other research also reveals (Fernandes and Carvalho, 2003).

More drug addicts were working as “working class” and “service and sales workers” than in the Lisbon and Tagus Valley population; on the other hand, fewer drug addicts were in the “intellectual and scientific professions”

Table 5.2 Occupation of the drug addicts' fathers and of the men living in Lisbon and Tagus Valley

Occupation	Drug addicts' fathers (55-59 years) % (n=310)	LTV male population (55-59 years) % (n=40.872)
Legislators, directors of public or private companies and managers	4	13
Intellectual and scientific professions	7	8
Mid level technicians and professionals	9	10
Clerks, administrative and similar workers	13	10
Service workers, and shop and sales workers	18	9
Working class, drivers and similar	37	41
Unskilled workers	9	8
Armed forces	3	1
Total	100	100

Note: N = 310 individuals was the total number of cases who had completed this field in the CAT database.

Source: CAT Database in Restelo and Statistics Portugal (2001); Census, 2001.

Table 5.3 Occupation of the drug addicts' mothers and of the women living in Lisbon and Tagus Valley

Occupation	Drug addicts' mothers (55-59 years) % (n=235)	LTV female population (55-59 years)% (n=29.580)
Legislators, directors of public or private companies and managers	2	6
Intellectual and scientific professions	7	9
Mid level technicians and professionals	6	8
Clerks, administrative and similar workers	24	15
Service workers, and shop and sales workers	25	17
Working class, drivers and similar	8	8
Unskilled workers	28	36
Armed forces	0	1
Total	100	100

Note: N= 367 was the total number of cases who had completed this field in the CAT database. In addition to the information on 235 working mothers of drug addicts, there is information for more 113 mothers that declared themselves as housewives, thus adding up to 30.8% of the sample.

Source: CAT Database in Restelo and Statistics Portugal (2001); Census, 2001.

or in “directors of public or private companies and managers” categories (see table 5.1). As already referred, this low figure may be associated to their starting work early in life and consequently dropping out of school in favour of jobs that demand lower qualifications.

Finally, we can see from tables 5.2 and 5.3 that parents of drug addicts, just like their offspring, are not found in job categories that include managers and scientific or intellectual professionals so much as in the Lisbon and Tagus Valley population. However, unlike their children and compared to the

Lisbon and Tagus Valley population, parents are concentrated predominantly in the intermediate professional categories such as sales and administrative employees,¹⁰ as opposed to categories such as working class or unskilled workers. It is also worth highlighting that most mothers of drug addicts were professionally active.¹¹

These results allow us to draw three quick conclusions: although there is transversality in relation to drug addicts in all the occupational sectors, they are clearly under-represented when compared to the Lisbon and Tagus Valley population both in terms of social origin and their belonging to the categories with higher educational and economic capital.¹² Secondly, and again using the Lisbon and Tagus Valley population as a reference, drug addicts' parents, especially mothers, seem to be concentrated more in the intermediate sectors than in those with lower qualifications. Could this be because of the effect of a greater capacity to use public services by sectors that have relatively high education and better able to seek outside help than those with fewer qualifications? Or could this actually be an effect of differentiated social distribution? Only more detailed information from the database that we have been using as reference could provide more precise answers; but this reference will be kept for future research.

Thirdly, these figures show that although drug addiction is a phenomena that is found in every social sector, it does not mean that social origin does not influence or condition the trajectories and life experiences of drug users, as other aforementioned studies have shown (Torres and Gomes, 2002; Fernandes and Carvalho, 2003). This will be seen more clearly from the interviews.

Drug addicts: most have married parents

Most individuals who sought help from the CAT Centre in Restelo were single (73%), 19% were married or living with someone, and 8% divorced or separated. There were significant differences compared to the Lisbon and Tagus Valley population (figure 5.5). At the time of their first contact with the CAT,

10 In this case, we analysed the data for the population aged between 55 and 59 residing in Lisbon and Tagus Valley as this is the age group of drug addicts' parents at the time they sought the CAT. Note, however, that the data on the occupational category of drug addicts' parents must be read with some caution as this field was not extensively filled in by the Restelo CAT Centre users.

11 Nevertheless, we would like to point out that the information available on the database regarding the mothers' job situation is for less than 50% of the sample. The relationship between the mothers' working condition and drug addiction will be discussed further ahead when we analyse the follow-up results, as the information obtained at that time is more recent and accurate.

12 It must also be noted that as this database belongs to a public service CAT Centre, social sectors with a better economic situation may be under-represented here as they may resort to the private sector and even to services abroad.

62% of these individuals were still living with their family of origin.¹³ So despite their average age of 27, most CAT users were still living with their parents which may indicate problems in their autonomy and independence process as already mentioned.

Contradictory to the more simplistic reading that links drug dependency to parents' separation or divorce, we ascertained that most of these individuals' parents were married. However, we also noted that the number of separated, divorced or deceased parents of addicts is higher than those of the Lisbon and Tagus Valley population (table 5.4).

These results tend to confirm what some studies have shown (Torres, 1996). On the one hand, it is the quality of both the marital and parental relationship that protects children from problematic life experiences rather than the formal conjugal situation e.g. being in a stable marriage, in itself; this is well illustrated in our analysis of the interviews. On the other hand, it is equally no surprise that emotional vulnerability and vulnerable relationships e.g. following the death of a parent, or feelings of loss following more or less traumatic separations, represent a further risk in the growth and autonomy processes. Examples of this kind are also seen in the life stories of the addicts interviewed.

Regarding only those who are living with their family of origin and although 54% live with both parents, it is confirmed that 33% live in a "single-parent family" and 5% live in a "step-family"; the rest live only with their siblings, with uncles or aunts, or grandparents. These figures must be taken into account when compared with the Lisbon and Tagus Valley where 20% of all "families with unmarried children" are "single-parent families" and 3% are "step-families". The interpretation for this can be the same as that for the above mentioned, marital status i.e. though most drug addicts live with both parents the number of family formations more vulnerable to relational risk is still over-represented. Nevertheless, precisely because common sense perspectives tend to forget this in an attempt to simplify this complex matter, we insist on stressing the point that most drug addicts' parents are married and living together.

In short, the information provided by the 885 files of users of the Centre for Drug Addicts (Centro de Atendimento a Toxicodependentes) in Restelo enabled us to make a socio-graphic characterisation of this population and systematically compare it to the Lisbon and Tagus Valley population to find regularities and specificities.

13 The other figures are distributed as follows: 21% of the individuals live with their procreation family ("with partner and children", 51%; "with partner", 45%; only "with children", 4%); 12% live alone (on the streets, in institutions, etc.); 5% live with someone from their "family of origin" (parents, siblings, grandparents, etc.) as well as members of their "procreation family" (partner, children, in-laws, etc.).

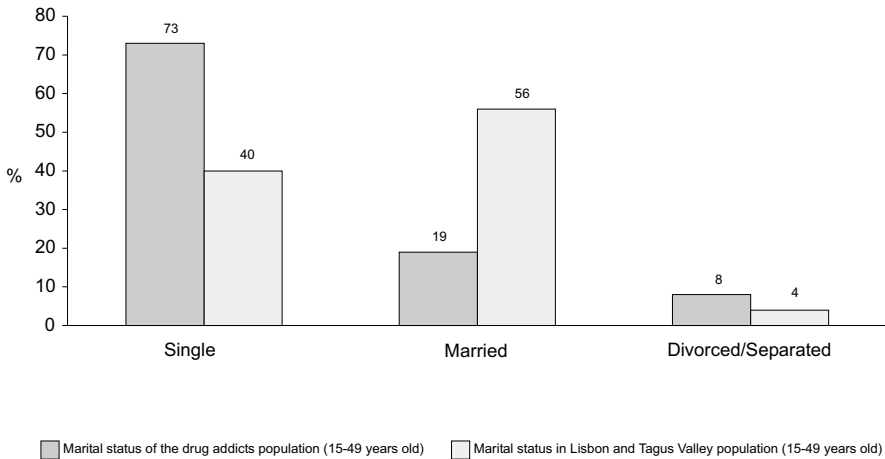


Figure 5.5 Marital status of the drug addicts and of the Lisbon and Tagus Valley population (%)

Source: CAT Database in Restelo and Statistics Portugal (2001), 2001 Census.

Table 5.4 Marital status of the drug addicts' parents and of the Lisbon and Tagus Valley population

Marital status of the drug addicts' parents	Drug addict population (55-59 anos) % (N=683)	Resident population of Lisbon and Tagus Valley (55-59 anos) % (N= 214,265)
Married	52	83
Divorced/separated	27	6
Widowed	19	6
Others	2	5
Total	100	100

Note: this category includes cases in which parents have never lived together or cases where they are both deceased.
Source: CAT Database in Restelo and Statistics Portugal (2001), 2001 Census.

On average most individuals who attended this institution were 27-year-old males, living with their married parents, had a low education, were unemployed and belonged to socio-professional categories involving low qualifications like working class or service workers.

It is also important to underline that the social transversality of drug addiction does not mean that individuals' different living conditions do not play a role in their life trajectory. In terms of social origin, intermediate sectors were found to be more represented than those requiring very high or very low social and professional qualifications than in the Lisbon and Tagus Valley population.

On the other hand, the living conditions of the addict population tend to be less favourable than those of the reference population. During the period of problem consumption, no investment was made in their education or profession which prejudices their ability to enter and remain in the labour market. Moreover, the social context marks the individual trajectory. The more economic, social and cultural resources an individual has, the greater his/her chances are of recovering and it is less likely he/she will turn rapidly to delinquent and criminal activities. This social difference in trajectories is well illustrated in the life stories of the addicts interviewed.

Finally, it is essential to contradict the simplistic idea which suggests addiction is a result of parents' divorce, single-parenthood, or their mother's job. Most drug addicts are children of married couples living together. On the other hand, for this same main age group, database revealed that the rate of working mothers for addicts is slightly lower than that of the Lisbon and Tagus Valley population. Thus, the association so often made by common sense between drug abuse of the youngsters and the raising rate of mother's activity is completely infirmed and questioned by our results, this issue requiring a more detailed and in depth analysis.

Follow-up: some years later, some stay, others recuperate

The fundamental aim of the follow-up carried out during the second empirical phase of the research was to understand the changes in the life paths of those who had attended the CAT Centre. Special attention was given to consumption and recovery, as well as social and family recomposition.¹⁴ The information obtained via a telephone survey revealed that 65% of those contacted said they were not taking drugs, 18% were in treatment and 17% continued to be dependent on drugs.¹⁵

The data obtained at the time of the telephone survey (information from the follow-up) were compared to the data collected when these same individuals were firstly attended at the institution. It was an important

14 We randomly selected 300 cases from the database of the previous empirical phase to be contacted for the follow-up. We managed to find the whereabouts of 121 individuals, 86 of whom answered the survey, 7 refused to answer, and in 28 cases it was answered by family members of the individuals contacted as they had either emigrated (6), died (7), been hospitalised (3), imprisoned (1), or the family member did not have their contact (11). In the end, 114 questionnaires were fully completed.

15 We consider the problematic use of drugs defined by the EMCDDA as injection of drugs or regular prolonged consumption of opiates and cocaine (EMCDDA, 2003). However, it should be stressed that these figures may be slightly inflated as the recovery percentage obtained is most certainly high as it relates to the individuals we managed to locate out of the group of 300 and who, therefore, may have more stable trajectories or belong to more structured groups. It is plausible that many of the individuals we could not locate continued to take drugs, had changed address, moved country or had died.

source of information giving us a more clear picture of the life trajectories of these drug addicts. Given that most were no longer taking drugs, an improvement could be seen in their education and professional situation and also in their autonomy as most had left their parents' home and had started a new family.

Increase in the level of education and better socio-professional integration

An effective increase in the level of education is observed when the academic level of the individuals contacted is compared with their academic level when they first sought help from the CAT Centre. As figure 5.6 shows, there are now more individuals with the 9th or 12th year, at the university, or who have even completed an university degree. As mentioned above, most managed to stop taking drugs and their abstinence can therefore be assumed to be a determining factor in their reinvesting in education. Presumably, this occurred because they went back to school and reinvested in their academic training after previously interrupting their studies, or because they stayed at school and continued drug consumption without interrupting their education thanks to the financial support provided by the family. Nevertheless, although these figures are higher than when they were attended at CAT Centre, they continue to be lower than the overall average for the same main age group residing in Lisbon and Tagus Valley.

A significant increase was also noted in these individuals' occupational integration. As it can be seen in table 5.5, the tendency towards unemployment is inverted when compared with their occupational status when they first contacted the CAT Centre and most are now employed (from 39% to 61%). These figures may be related to the increase in age, but also certainly to the fact that most of them have currently stopped problematic drug use and so no longer have the same difficulties with occupational integration.

However, no significant occupational improvements can be seen in the development of these individuals' lives (see table 5.6). There are more service workers and salespeople, fewer working class but more unskilled workers. And although there is an increase in "company administrators", most of them are management jobs in small trading companies or small self-employed businesses. The lack of educational and professional investment during the drug-taking period most certainly led to a limited, slow and specific readjustment to the labour market.¹⁶

There were, however, marked differences in the marital status of those interviewed compared with when they first contacted the CAT Centre.

16 It is also recognised that employers may be discouraged from employing these individuals if they know they have a history of drug dependency and this situation may be aggravated on a broader context of unemployment.

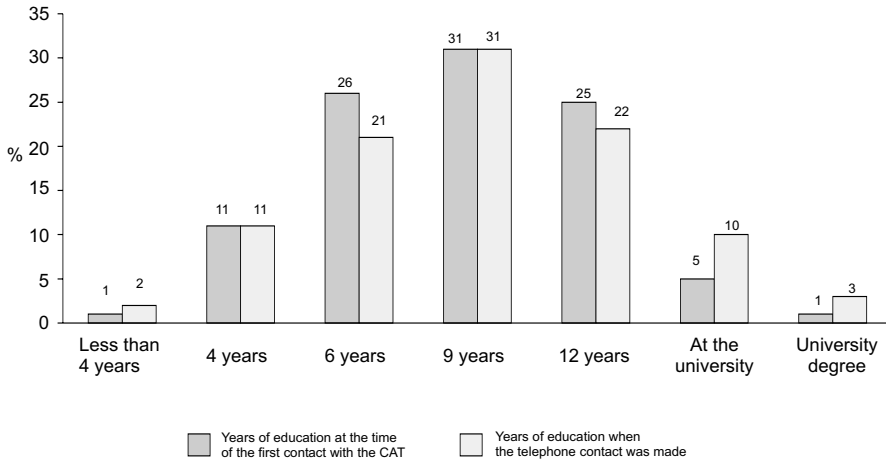


Figure 5.6 Years of education at the time of the first contact with the CAT Centre and when the telephone contact was made (%)

Note: there are more cases in the “no level” column at the time when the telephone contact was made than when they first sought help from the CAT Center. This is not because users’ qualifications decreased during that period, but because in a few cases there was no record on the database about qualification level when they first contacted the Center. This information was always registered in the telephone contact.

Source: CAT Database in Restelo.

Table 5.5 Drug addicts’ job situation at the time of the first contact with the CAT Centre and when the telephone contact was made

Job situation	First contact with the CAT Centre (database information) % (n=109)	Telephone contact (follow-up information) % (n=109)
Employed	39	58
Student	6	3
Worker student	0	3
Unemployed	54	31
Disabled	0	5
Other	1	0
Total	100	100

Source: CAT Database in Restelo.

Thus, as we can see in table 5.7, many of them married or began a partnership (from 15% to 37%).¹⁷ Though age may be an important factor in the increase in marriage and partnerships in this case, on the other hand, the fact that these individuals are not taking drugs most certainly means greater

17 Most partners of those interviewed studied up to the 9th year (33%), the 6th year (19%) or finished university (17%); are employed (70%); and belong to the professional category “service workers and salespeople (23%)” and “intermediate professional technicians” (20%).

Table 5.6 Occupation at the time of the first contact with the CAT Centre and when the telephone contact was made

Occupation	At the time of the first contact with CAT (n=85) a)	When the telephone contact was made (follow-up information) % (n=108)
Legislators, directors of public or private companies and managers	0	5
Intellectual and scientific professions	4	3
Mid level technicians and professionals	9	13
Clerks, administrative and similar workers	14	10
Service workers, shop and sales workers	27	26
Working class, drivers and similar	32	24
Unskilled workers	14	19
Total	100	100

Note: this number is less than 114 because the CAT database only had information on the professional category at the time of the initial contact for 85 cases.

Source: CAT Database in Restelo.

Table 5.7 Marital status at the time of the first contact with the CAT Centre and when the telephone contact was made

Marital status	At the time of the first contact with CAT (n=111)	When the telephone contact was made (follow-up information) (n=113)
Single	79	50
Married/Living with someone	15	37
Divorced/Separated	6	13
Total	100	100

Source: CAT Database in Restelo.

Table 5.8 Parents' marital status at the time of the first contact with the CAT Centre and when the telephone contact was made

Parents' marital status	At the time of the first contact with (n=113)	When the telephone contact was made (follow-up information) (n=111)
Married/living with someone	67	58
Divorced/separated	12	13
Widowed	19	26
Never lived together	2	3

Source: CAT Database in Restelo.

emotional stability, thus facilitating these relationships. Note, however, that the percentage of single persons is still significant.

Most parents of those interviewed are still married (58%). Nevertheless, if we compare the current marital status of these parents with when their son/daughter first came to the CAT Centre, there was a slight decrease in the number of married parents as well as an increase in widowed parents; this is probably explained by the effect of the increase in age (table 5.8).

Substances and treatments

This follow-up also provided more information on the various consumption practices of different illegal substances, as well as the attempts of treatment among the population that attended the CAT Centre. Yet again, the figures for the average age that individuals declared their first consume of illegal substances confirmed that drug-taking starts mostly during adolescence.

Accordingly, the average age when all those surveyed first experimented substances was as follows: cannabis and cocaine at the age of 15, stimulants at 17 and hallucinogens at 18, heroin at 19, and ecstasy at 22. After this first experience, however, the regularity with which they take each substance varies. Indeed, cannabis, heroin and cocaine are (or were) taken regularly, whereas the other substances, especially ecstasy, are (or were) taken sporadically. The average time for problematic consumption is 9 years for cocaine and 10 years for heroin.

When asked if they were currently taking any type of illegal substance, 61.4% said no, 6.1% did not or could not answer¹⁸ and 32.5% answered affirmatively. Of the total who said they were taking drugs at the time we made the telephone contact, 45% were taking cannabis, 8% were taking cannabis together with sedatives and/or ecstasy, and 8% were taking only sedatives; in turn, 20% were taking heroin, and 19% were taking cocaine and heroin. Those who said they were no longer taking drugs said that they had been able to do this thanks to "determination", "family support", and "therapeutic/medical support". On the other hand, those who had tried detoxification several times but had not managed to give up "hard drugs", said that they had "lack of inner motivation" or that they "enjoy taking drugs" as the main reason for keeping their drug addiction.

On the whole, addicts stated that they had used approximately 60 different support institutions for drug addiction; the wide range of public and private options available includes CAT Centres, private doctors, therapeutic communities, health centres and narcotics anonymous. This diversity

18 Note that information was obtained from relatives for a very small number of individuals.

Table 5.9 Father's occupation and interviewee's average period of heroin consumption

Father's occupation	Interviewee's average period of heroin consumption (years)
Legislators, directors of public or private companies and managers	10,7
Intellectual and scientific professions	6,3
Mid level technicians and professionals	9,8
Clerks, administrative and similar workers	9,3
Service workers, and shop and sales workers	6,7
Working class, drivers and similar	11,5
Unskilled workers	15,5

Source: CAT Database in Restelo.

Table 5.10 Mother's job situation and interviewee's average period of heroin consumption

Mother's job situation	Interviewee's average period of heroin consumption (years)
Employed	7,9
Unemployed > 1 year	9,0
Unemployed < 1 year	6,5
Retired	10,5
Housekeeper	12,3
Disabled	11,0

Source: CAT Database in Restelo.

may mean that the choice of a treatment centre may be based on a “shopping” strategy.

These respondents spent an average of 5 years in treatment (25 to 30-year-olds). However, as this average refers to “assisted treatment” and not to “detoxification attempts” which are tried countless times and sometimes without specialised assistance, the average number of detoxification attempts is probably much higher. Of the total number who said they were no longer addicted, 50% managed it with help from CAT Centres, 20% with help from communities, 8% through narcotics anonymous, 6% with help from doctors or private clinics, 6% on their own, 5% in hospitals, 3% in prison, or other situations (2%).¹⁹ Of those who said they no longer took drugs, 38% said they managed it through the Restelo CAT Centre. However, if we consider that all those interviewed in the follow-up, which included those who continue to consume and those who are still in treatment, 25% declared that they have recovered thanks to therapy at the Restelo's CAT. As for the 32% of the total that went through the Opioid Replacement Programs in different treatment centres, 83% say they managed to recover.

19 We obtained 102 valid responses from the set of 114 for these questions regarding treatment.

There is no doubt that drug addicts in treatment have relapses and take drugs temporarily. The signs explaining these relapses revealed by the drug addiction clinic are indicative of the complexity of the drug addicts' own interior world: devalorisation of self-image; loss of self-esteem and feeling of emptiness; the belief that nothing in everyday life compares with the comfort and pleasure provided by drugs; the feeling of not being understood and having no-one to help solve internal conflicts; the ambivalence between what they feel like doing and the demands of a recovery plan.

These signs from the internal world usually coexist with anxiety (Ribeiro, 1997). However, there are also contextual factors that may cause relapses, risks provided by the external environment, such as peer-pressure, drug-related stimuli, the attraction that the drug *environment* itself exerts on an addict's imaginary world, stressful situations, easily accessible drugs, mixing several drugs (Ribeiro, 1997). The frequency of the relapses, which marks the therapeutic path of all drug addicts, is what has been called the "*addictive cycle*" (Trujols *et al.*, 1996, quoted by Ribeiro, 1997).

Our aim was also to answer some of the questions related to the success of treatments for drug-addiction, so we crossed individuals' social characteristics with their consumption trajectories and their search for treatment. We could find out that individuals who have been taking drugs longer (heroin, in this case) were children of parents with disadvantaged social and economic situations (table 5.9). It was also concluded that when his/her mother was a housewife, the individual remained addicted to drugs longer (table 5.10). Thus, the treatment of those with greater social and economic means is more likely to be successful, whereas individuals who do not have these means will more likely follow marginal and delinquent activities throughout their lives to feed their dependencies. In this case, they will resort to minor trafficking as a way of life and to be able to sustain the habit. Indeed, approximately half of the individuals contacted had been involved with the law (42% were arrested, 32% stood trial, and 26% were detained at the police station), mainly for problems related to trafficking, consumption, or crimes linked to obtaining money for drugs.

In short, the information obtained from the 114 telephone interviews shed light on life trajectories of these individuals after they had been attend at the CAT Centre. In most cases, they had sought various private or public institutions, individual, family, occupational or group therapies, different ways of kicking the habit, both at home and in clinics and therapeutic communities, and also, in some cases, opioid replacement treatments. After an average of 10 years' taking heroin and 5 years of attempted assisted treatments, most of the individuals contacted were no longer users. It was also noted that although only 32% of those contacted had resorted to opioid replacement treatments, the percentage of those who say they recuperated thanks to this type of program is high.

It should also be stressed that some paths were close to delinquency, prison, and other were less problematic trajectories as they enabled greater mobilisation of resources and better support from family and friends networks, as already highlighted in the database results.

In keeping with the fact that a significant percentage of those interviewed had stopped taking drugs, the results of this follow-up also allowed us to conclude that this was also due to an improvement in the levels of education, and family and professional situations. In other words, there was an overall improvement in the personal and social integration factors. It must also be stressed that the large majority of these cases had gone through major difficulties, with various attempts to stop drug-taking, relapses, and considerable effort to relinquish the drug habit. However, even if a significant percentage seems in fact to have successfully negotiated their way through this difficult trajectory, we do not know what has happened to those we were unable to contact.²⁰

It would also make sense to contradict preconceived views whereby a mother's professional activity is the reason for all kinds of negative consequences, among which is the fact that the lack of supervision would be enough to encourage their children to start taking drugs. In fact, the study (especially the follow-up phase) revealed not only that the heroin dependency period is greater among those whose mothers were housewives, but also that in the interviews these mothers expressed a lack of personal fulfilment, a negative self-image, and the possibility of having to put an end to a very close relationship with their sons/daughters.

Family and social trajectories, problematic ties

Seventy persons were interviewed in the third phase of the study,²¹ 39 of whom were drug addicts who had attended CAT Centre, 31 were their respective siblings or were part of their close network (peers or spouses) and were not problematic drug users. The initial aim of the study was to identify differentiating factors that could account for different attitudes and practices of the interviewed towards drug abuse comparing individuals with very close family or relationship ties. We found out, as foreseen in the beginning of the research, that most of those interviewed who were not addicts had also

20 Of the 300 randomly selected individuals from the CAT database, we only managed to contact 121. After several attempts, we found it impossible to locate the remaining 179 (addresses and telephones numbers cancelled or not updated, etc.).

21 Within the context of the follow-up we asked the individuals contacted who had attended CAT Centre and who had a brother or sister who did not have a history of problematic drug use if they were both willing to cooperate with the research team and accepted being interviewed. Priority was given to drug addicts and their siblings, but when this was not the case, close friends or spouses were the ones interviewed.

tried or taken certain drugs. By controlling the social, family and psychological context variables, we tried to assess and understand the specificities that distinguish the paths taken by individuals who became drug-dependent from those who did not.

Let us now turn to some of the preliminary and summarised results of this research phase, leaving any necessary deeper analysis for subsequent texts.

It should be remembered that despite the transversality of the problematic drug use across every social class, the database analysis, the follow-up and the results from other studies demonstrated that having better financial resources or coming from more qualified occupational sectors had a significant effect on the life, drug use and recovery trajectories of drug addicts. Our aim with the analysis of the interviews was to grasp more deeply and to have a better understanding of the “marks” made by the different social and cultural contexts on the individual and family histories.

Due to the second research hypothesis, the aim was also to assess the impacts of the family relationship models, of experiences of a perhaps traumatic loss or even marital and parental dysfunctions or difficulties on individual trajectories. The third question, which arose from the previous one, sought to shed light on and help to explain why siblings within the same family have different experiences of problematic drug use. And finally, the last hypothesis was built around the effects of gender and adolescence and on the specificities of male and female development. The main goal was to determine what kind of factors could explain such a big sexual asymmetry among drug users.

Moving now to some of the findings. Firstly, this phase of the study led us to a new concept. In the old tradition of the so-called applied rationalism (Bachelard, 1971), it was the very course of the research, the contact with the field and the life stories analysed, the continuous process between theory and empirical data that led us to propose the concept of *problematic ties*. Indeed, the fact that from the start we sought to contextualise the individuals' trajectories on three levels — social conditions, family patterns and mental processes — following the above mentioned multidisciplinary approach of Olievenstein, enabled us to improve the analytical framework by highlighting and acknowledging specific socio-psychological frameworks.

Thus, a specific combination of factors or vulnerabilities — *problematic ties* — that seemed dominant in a drug addict's life history, proved to be different from other cases where dominant weaknesses were revealed in other areas with a different conjugation of factors. We identified a schematic framework of four problematic ties: *social/family*, *family /individual*, *individual/social* and *social/family/individual*. Accordingly, and as indicated at the outset, the study completely corroborated the multi-dimensional perspective of drug addiction, rejecting essentialist and reductive approaches that

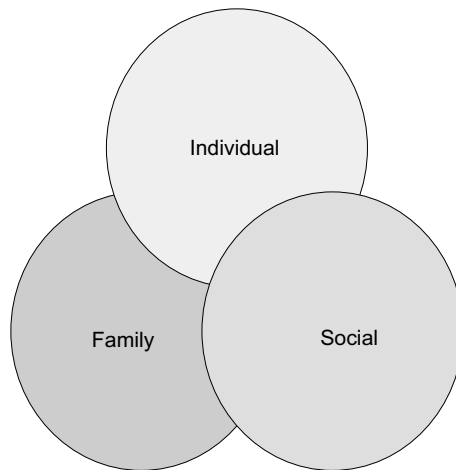


Figure 5.7 Problematic ties

tend to explain it as being a specific personality pathology, a concrete family function or dysfunction, a determined parental or maternal relationship, or even to attribute it to a crisis in values or the hedonist ideologies of contemporary societies.

Turning to some examples. For certain trajectories, the social and family contexts caused such an impact and were so complex that they seem in themselves to be the most influential factors in explaining the path of drug addiction; we classified this as the *social/family problematic tie*. This is the case of situations of severe poverty, violence and existential emptiness, or when children were not accompanied, parents were distant, not present or were over-working in their fight for survival. This was the situation that Nuno Pereira faced; he comes from a poor and socially excluded environment; his mother was a prostitute and he was adopted by a poor family who already had nine children (some of whom also became drug addicts). In his own words:

I never had any luck in life. Since I was a kid. Since I was 15 days old, when I was abandoned by my so-called mother. [Relationship with his adoptive father] — He was bad, very authoritarian, he didn't see me as his son. He drank a lot and treated me badly physically [...] he would tie me to the table so that I couldn't leave the house. Nuno Pereira (36, 5th year of education, HIV positive)

The case of João Vicente is identical. When asked about the memories of his adolescence he answers referring to his father and his life:

He never punished me. He would beat me, with his hands, boy would he use his hands [...] he'd drink and that was it [...] he wouldn't even speak, when he did, it was to pick a fight; [in adolescence] What did I like? Honestly, I didn't enjoy anything; life was no good.

The social conditions and relational context seems so prevalent and influential in the trajectories of these individuals that they seem to override other dimensions. This was also the case of Nelson Oliveira, who comes from a working class family with nine siblings, eight of whom were addicts, living in a neighbourhood where drug use was widespread. With no parents present on a daily basis and supporting them, the siblings grew up together with no structuring authority, using and trafficking drugs as a way of living.

In other trajectories, it was family patterns and individual psychological vulnerabilities that were considered more relevant in giving shape to the *family /individual problematic tie*, for example, in the case of traumatic loss and problems of autonomy and separation. Other studies have revealed a positive correlation between loss and traumatic experiences in childhood or adolescence and drug addiction (Torres, Sanches and Neto, 2004). This was also observed in the cases of Susana Alecrim and Rita de Jesus.

Susana (35, university student) grew up isolated, shy and with no support from a mother understood to be authoritarian. She had a very close relationship with her father and identified herself with his depression. She started taking heroin following his death when she was already addicted to medicinal drugs. This is a clear example of strong ties with a narcissistic dependency connected to the father, together with the inability of the self to deal with mourning a parent and overcoming depression.

Rita de Jesus (19, 9th year), whose parents were separated, was raped from the age of 9 to 11 by a brother of her grandmother. When the case went to court she started taking hashish; later, when she was 16 and on the day before the trial, she started on heroin; at the age of 12 her mother paid her 25 euros a day to do the housework. "My mother is more cold-hearted than my father..." (in the meantime her father had threatened to kill her mother with a hunting rifle). After consecutive traumatic and frustrating experiences, this young girl tried to change or anaesthetise her mental pain, particularly feelings of anger, guilt and shame by taking drugs. Here, social context seems to play a much more distant role than the effects of a problematic family history and psychological trauma caused by sexual abuse.

The database also revealed that the loss of a family member, either through death or separation, prevailed more in this sub-group than in the Lisbon and Tagus Valley population and was often experienced with feelings of instability and anguish which made individuals vulnerable.

However, a bad marital relationship between parents in a contentious but otherwise stable marriage also seems to have been harmful. Rigid, authoritarian

and violent paternal roles by fathers who are not a reference model or positive model of identification for their children also showed having negative effects. This is what can be gathered from Pedro Perdigão's reply (44, with a university degree, brother of António, drug addict) to the question "What was your relationship with your father like?"

Bad. Tense. Very complicated, he treated us really badly. [...] Suffice to say that my mother left him because he tried to kill her...

In fact, the case of the Perdigão brothers clearly shows different ways of dealing and experiencing the same family background. António (41, 10th year of education), whose father had high expectations for him, was a good student, well-behaved and a sportsman; it seems he started taking drugs and continued to do so to be able to live up to his father's expectations and to what he believed was a suitable performance. On the other hand, Pedro (44, older brother, with a university degree), mentioned above, tried all sorts of hard drugs and ran every type of risk, but quickly withdrew from dependency through an emotional and affectionate relationship.

We also found cases of siblings with a great age difference between them and whose adolescence took place at different cultural and generational contexts affecting differently their individual trajectories. Furthermore, for some reason one of the siblings was also found to receive more emotional support from one or both parents or perhaps perceived his/her parents differently to that of the drug-dependent siblings. Finally, it must not be forgotten that the experiences and dependences of older siblings may also have an impact on the younger ones. Ignorance about drugs and their negative effects can no longer be evoked and any eventual "glamour" associated to a life outside the margins vanishes. As Helena Costa's example shows (27, with a university degree), sister of Carolina (31, university student). In her own words:

They [my friends] were not the type to take drugs. In fact, I always tried to keep away from that group of people. And more so because of Carolina's example who was already becoming dependent; I didn't want to be involved with groups of people who smoked whatever.

In other situations, the fusion between the *individual* and the *social* dimension was prominent. That can be the case when there was no parental support nor protection during adolescence and at the same time there is a "masculine" desire for affirmation within the peer group. That is what seems to have happened with Daniel (31, 12th year), who was trafficking hashish at the age of 13. According to him, this gave him power and access to a lot of money:

Hashish gave me power, because I was the centre of attention for a while. I got what I never managed to get that for who I am from the drugs.

In this case, he draws a positive picture of his family that seems to have been emotionally close. But as Daniel also says “my parents worked a lot to give us an acceptable standard of living. When they were around they were always on hand, but most of the time they were away.” Both parents let their children (who both became drug addicts) grow up in the street and did not give them much support. This life story clearly demonstrates what was said before about the changes of modernity involved in moving from the countryside to the town. Parents do not seem prepared to deal with their offspring’s education in a new environment, notably large towns, where there are other dangers and difficulties. They work hard to support their children, they are neither strict nor have difficult relationships with them, they provide their basic needs, but there is little support or supervision whilst they are growing up and developing. It is as if reproducing their own socialisation experience with their children, doing what their parents did, no longer works in the new environment.

Finally, we considered more “heavy” situations and trajectories where a series of vulnerabilities and difficulties were combined leading us to define it as the *social/family/individual problematic tie*. Carlota Quintela (31, university student) is a clear example of this. She has lived alone in her flat since she was 13.

[What really marked me in life] was feeling no support, not having any support, having that unstable life and hating being alone and I used to stick knives in the walls, have a few drinks, it was all bad, it was bad [...] my body lived outside myself [...] my mother was a dead chair [...] I needed to trust but I didn’t [...] I’m tired of everyone [...] it’s a social problem, I can’t be sociable without being under the effect of something, I’ve tried, but it’s very painful.

Diverse trajectories and problems can therefore lead to drug addiction. In certain cases, there are combinations of social and family vulnerabilities, which can be found in social trajectories closer to poverty and/or social exclusion. Drugs represent here most of the times not only a way of escaping from burdensome and difficult daily lives but also a way of living and of getting money from drug traffic. In other cases, it is certain types of family dysfunction that are more prominent — the death of a parent, conjugal and parental deteriorated relationships — which combined with specific individual vulnerabilities may result in feelings of shame, stigma and relationship problems. In other case histories, serious feelings of loss and being abandoned, severe parental failures or truly traumatic experiences give way to living nightmares where drugs act as a powerful sedative for mental pain.

Proposing the new concept of “problematic ties” is a way of confirming the multidimensional approach to drug addiction. It allows, at the same time, and based on the proposed typology and on concrete cases the understanding about what kind of problems may explain better each situation. This type of approach, and going further on this line of analysis, can also contribute towards a better diagnose of specific cases of drug addiction, as well as differentiated therapies and treatments.

In future texts we address specific approaches to each of the problematic ties, and provide more in-depth analyses of the influence of family profiles and gender on drug addicts’ trajectories and contribute to explaining differences between siblings.

Concluding notes

Some very general concluding notes are outlined below striving to cover some of the results obtained from the various techniques used, searching also to answer the questions raised in the beginning.

Three main conclusions from the database, follow-up and analysis of the interviews can be stressed on the relationship between the social context and drug dependency. Although drug addiction was found to be quite transversal across the various social sectors, asymmetries were also detected concluding that the social context clearly affects addicts’ trajectories. Thus, it can be concluded from the database that, with regard to social origin and comparing with Lisbon and Tagus Valley population, there are more addicts originating from intermediate professional sectors — administrative and service employees, or intermediate technical professionals — than from sectors requiring higher or lower qualifications.

Both the follow-up and the interviews showed that people who were poor or from social sectors with lower professional qualifications and/or originating from poor neighbourhoods, where drugs are present from an early age had heavier and harder drug addiction’s trajectories. Several interviews show that these situations can rapidly lead to a path of petty crime in order to be able to feed addictions. This was also the case when young people were brought up in families with many children, whose parents were basically busy trying to fight for survival in adverse conditions to protect their children and helping them growing up. On the other hand, in better social sectors with more stable and qualified jobs, the trajectories of drug addicts may be concealed for a long time; this can be easily inferred by the number of individuals still employed and who can make their consumption habits compatible with their job. These situations only become problematic much later.

The interviews also showed, for example, the differences in the trajectories of young women who came from more or less favourable social environments. In the case of less fortunate environments, it was evident that very

difficult trajectories, which often ended in prostitution, quickly fell into situations of great physical and psychological deterioration. In the case of more fortunate environments, such trajectories would occur later, or in some cases were even avoided being also and often less visible.

The follow-up and the interviews not only revealed that the social context affects the attempts to leave drugs, but also showed the negative effects of poor social contexts, especially when associated with very adverse and/or physically or psychologically violent family situations. Feelings of great psychological vulnerability, loneliness and of being abandoned, anger and resentment were clearly expressed as some of the excerpts of the interviews demonstrated. In contradiction to the simplistic idea that tends to attribute addiction to the fact that mothers have a job, addicts on heroin were longer time dependent when their mother was a housewife.

In short, we believe that by using various research techniques with results that confirm each other, we have shown that drug addiction affects young people of every social class but touching people in different ways and with different effects.

Coming back to some of the main research questions. We had asked why would it be that most of the young people experiment drugs or any other type of illegal substance, but only some become dependent. We also raised the issue why were they contrasting trajectories within the same family regarding drug addiction and siblings with and without drug addiction trajectories.

The path followed by the research confirmed initial evidence. On the one hand, experimenting some kind of substance during adolescence was indeed very common among the peers of the addicts interviewed, even those belonging to different generations. As described at the beginning, this time of life fosters the trying out of new experiences which adolescents use to try to overcome themselves, trying to state their self and separate from the family, asserting their identity as an autonomous person.

But, as the case of many addicts' siblings and peers showed, experimenting does not necessarily means dependency. Dependency tends to appear when the result of trying out drugs is associated to social, family or individual vulnerability and mental frustration, as Amaral Dias (1979) had indeed stressed. In fact, the trajectories of siblings and peers who had contact with drugs were completely different in many cases. As the case of the Perdigão brothers showed for example: whereas one brother made varied and more radical experiments and then quickly put a stop to such practices, it was the other, who apparently seemed to be more integrated and less problematic, that became dependent. There are also situations where drug dependency of the older sibling tends to discourage the younger ones from consumption as they clearly want to keep away from the type of world that they have already perceived as being negative or dangerous.

As supported by several theoretical perspectives, the analysis of family patterns also helped demonstrating that the actual experiences of family life may be perceived by the set of siblings differently. Children often see their parents' marital relationship differently; the parental relationship with each of their offspring by both parents is distinct and there are also bonds and exclusions among some members of the family. The relation between what happens within and outside the family environment, with peers and within the generational context, may also strengthen differences between siblings.

The complexity and relevance of the conclusions reached during the research on the influence of family experiences on the addicts' trajectories are such that they deserve a fuller and more specific description in a separate text. However, it is registered here that the results clearly stress that there is no specific type of family, or morphology, or concrete family shape that leads to drug addictions, as it is shown by the examples of the interview excerpts and the identification of the problematic ties.

A last contribution goes to answering the other question made at the start — why are there more men than women addicts? Based on the analysis of the interviews, we conclude with some avenues of interest for future research.

Everything in these life histories occurs as if the process of becoming autonomous in adolescence is very problematic, especially for men; this process is marked strongly by gender as adolescents grow up either as a boy or as a girl in a certain social context trying to identify with profiles of hegemonic masculinity or suitable femininity. It seems that it is difficult for them to accomplish the tasks demanded of them, both in the family context and in their peer group, going from demonstrating their ability to be autonomous, resistance to frustration, or the need to run risks. Drugs can act as a way of anesthetising the difficulties felt, a means of lessening internal conflicts, or improving their relationship with others, as some of our interviewees expressed.

In fact, the young men interviewed were generally found not to identify positively with their father and often compensated for this with a closer mother-son relationship. It is as if the growth process were blocked by the lack of a male reference or a positive image of what it is to be a man, because the father is no longer a model to be followed. However, the proposed explanation of male predominance in drug addiction cannot be reduced to this dimension.

Although many of those interviewed did in fact seem to consider their father to be a strict and/or violent man, and even stated so clearly, others saw their father as a distant and overworking figure, and others did not even mention them as a relevant figure in their lives. As already stated, other factors must be taken into consideration such as the social context, family relationship and specific psychological vulnerability, as was also evident when siblings of the same sex have different stories when talking about their

progenitors. Nevertheless, the way in which families function, with a sexual division of the typically strict patriarchal roles may in fact condition young males negatively, as Parsons himself has shown (Torres, 2001). This subject in itself deserves development in a future text.

As for the girls, two points should be briefly stressed: on the one hand, there are cases in which mothers are not protective for various reasons: they are depressed, they reveal neglect behaviour and they are ill or died. If this type of situation is combined with an absent or distant father figure, the feelings of being abandoned and despair expressed by some of our interviewees are easy to understand. On the other hand, these same reasons may help to explain the fact that some of the young female addicts described more catastrophic experiences and heavy stories of loss and of being abandoned.

However, like the subject of family profiles and siblings, the cross-effects of gender require more in-depth analysis that implies new perspectives and other contexts.

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Poverty and social exclusion

Luís Capucha

Until the adhesion of the new member states to the European Union, Portugal was the country where the indicator for unequal income distribution was the worst and with the greatest vulnerability to poverty. “Europeanisation” in this field has been one of the most poorly accomplished dimensions of the modernisation project that is implicit in the set of reference guidelines of the European space to which we belong.

The levels of inequality and the extension and intensity of poverty in Portugal are structural and are deeply embedded in the main institutions. They result from lengthy historical processes where atavisms brought about by a long past of underdevelopment cross with modernisation dynamics which on one hand have generated marked improvements in people’s living conditions whilst also producing new social contrasts on the other hand. The legitimate demands to satisfy former and new basic needs have also become greater. In other words, Portugal as a whole is still relatively poor within the European context and has a large percentage of poor people even though it has undergone a marked growth and development process, albeit contrasted and irregular, over the last decades. These two factors are related and while the day to day lives of the most needy are seriously lacking in different aspects of quality of life, the efforts to overcome them also reflects the way institutions work and the quality of life of citizens as a whole. The poverty problem is therefore central in Portugal today, in the context of the objective of a balanced and cohesive transition processes to the information society and the knowledge economy.

We begin showing some of the main indicators generally used in research, in the field of social policy and also for the measurement of poverty from a European perspective. First, it is very important to underline the fact that the information available is not up to date.¹ The most recent data were

1 The European Household Panel is used as the source; this allows European comparisons

published in 2001² and report the monetary income of families in 2000. The effect produced by the political and economic cycle since then is therefore unknown. However, it should be said that there is a lack of transparency throughout Europe regarding the way in which the question of social cohesion is treated, and which is proportionate to the discomfort felt on this matter by political and economic authorities.

The monetary value of the poverty threshold officially used in the European Union, i.e. 60% of the equivalent median income,³ was €6,305/year in 1995 and rose to €8,253/year in 2001. The Portuguese figures of €3,745/year and €4,967/year respectively, in other words 59.4% and 60.2% of the European average, are the lowest in the EU15 in both years (see figure 6.1). Whereas the poverty threshold in the EU15 in the period under analysis rose 30.9%, the figure for Portugal was 32.6%. Despite a very slight approximation, this still leaves the country lagging far behind the European average standards and particularly far from countries in the “continental” group⁴ like Belgium, Denmark, Germany, Luxembourg and Austria that are clearly above the average. The “nordic” Sweden and Finland are also slightly below the average. Equally, France, the Netherlands and the United Kingdom are very close to this average. The “southern” countries of Portugal, Italy, Greece and Spain, together with Ireland, are in a lower position.

The at-risk-of-poverty rate after social transfers for Sweden and Finland, together with the other “nordic” country of Denmark and the “continental” countries of Belgium, Germany, Luxembourg, the Netherlands and Austria are also the lowest (see figure 6.2). The “southern” and “Anglo-Saxon” countries are placed well above the European average, though the United Kingdom is approaching the average, while the figure for France is the same as the EU average. This is the most used indicator to measure poverty levels and an improvement was registered both in Europe and in Portugal, falling from 17% to 15% and from 23% to 20% respectively between 1995 and 2001.

As can be seen from an analysis of at-risk-of-poverty rate before social transfers (see figure 6.3), while the decline of poverty in Europe was the same

to be made on poverty and the distribution of monetary income as well as on other variables related to the living conditions of families that are not under analysis here. More than an analysis of the long term evolution of poverty in Portugal that would be possible using the INE's Portuguese Household Budget Survey, the aim is to place Portugal's evolution in the European context in a more recent period. As a result of this choice, the non-monetary income that is taken into consideration by the Household Budget Survey is not taken into account. For an analysis of the resulting deviations see Rodrigues (1999).

- 2 New data was published recently, after the present chapter was produced. The poverty risk has diminished slightly, but the structural trends remain the same.
- 3 Using the modified OECD equivalence scale that assigns a weight of 1 to the first adult, 0.5 to the remaining adults and 0.3 to children.
- 4 According to the typology proposed by Ferrera, Hemerijck and Rhodes (2000).

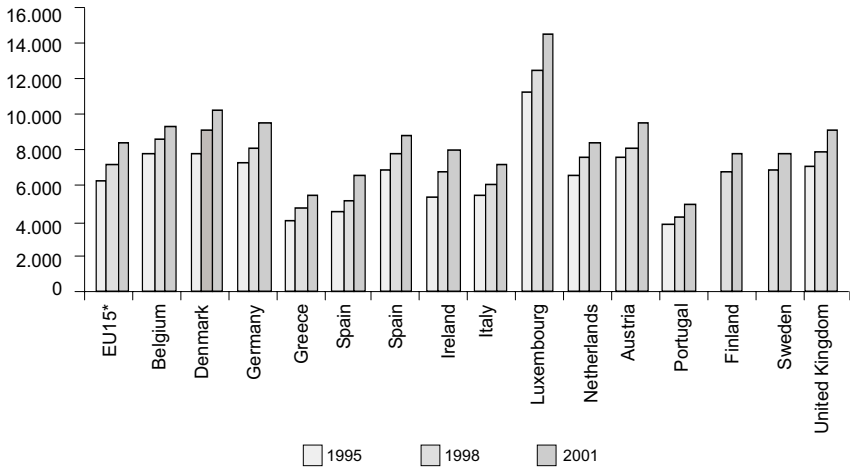


Figure 6.1 Poverty threshold in the EU15 (Euros/year)

Source: Eurostat, European Household Panel (2001).

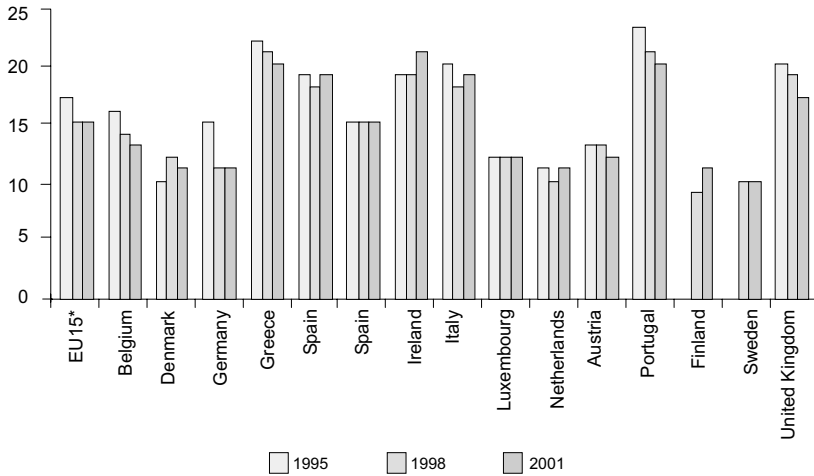


Figure 6.2 At-risk-of-poverty rate after social transfers (%)

Source: Eurostat, European Household Panel (2001).

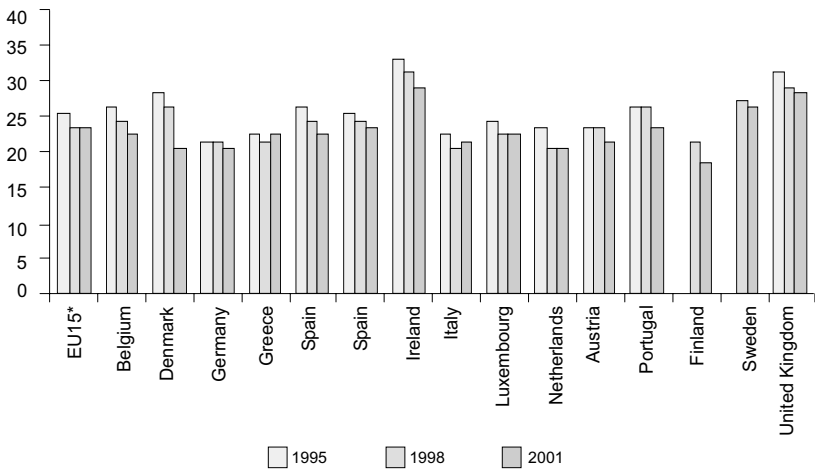


Figure 6.3 At-risk-of-poverty rate before social transfers (excluding pensions) (%)

Source: Eurostat, European Household Panel (2001).

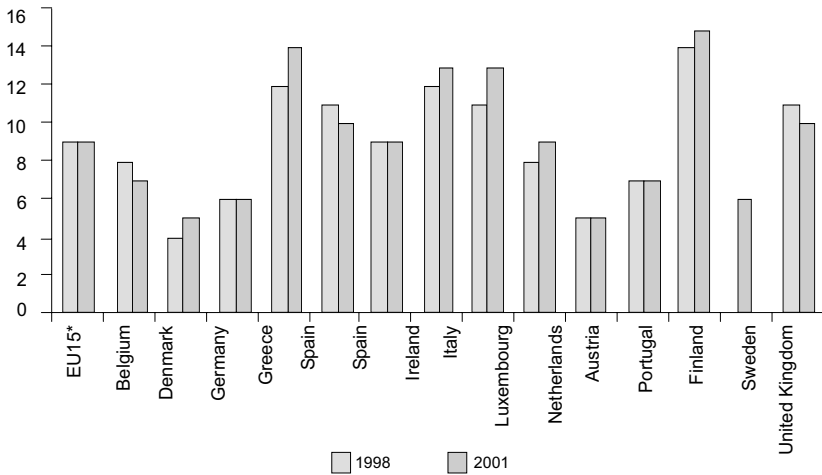


Figure 6.4 Persistent risk of poverty

Source: Eurostat, European Household Panel (2001).

as the total reduction (2 percentage points) considering just the primary incomes, the reduction in Portugal in the first years was only a result of these transfers as poverty remained constant at 27% without transfers. The turning point for this came in 2001. There is an average 9 percentage point difference between the risk of poverty before and after social transfers in the EU15. This difference goes a long way to explaining why there are more poor people in some countries than others. We note that with the exception of Ireland, the member states with least risk of total poverty are the ones in which the impact of social transfers (except pensions) is greatest, ranging between 9 percentage points in France to 17 in Sweden. Greece, Spain, Italy and Portugal are at the opposite extreme and the registered "impacts" of these transfers is between only 3 and 4 percentage points.

Persistent poverty is an indicator of the more or less consolidated nature of the phenomenon. It measures the proportion of people who remain at risk of poverty in at least three consecutive years, including the year of reference. Portugal has by far the worst performance in the EU15, which reveals the relation between the phenomenon and the prolonged processes of underdevelopment associated to its reproduction (see figure 6.4). Indeed, the average risk of persisting poverty in Europe is 9% compared with 15% in Portugal. Without minimising the importance of Portugal's position, it should be noted that a pattern of greater vulnerability is also revealed in this parameter for Greece, Italy and Ireland.

Portugal's performance in the inequality indicators is even worse. These measurements include the proportion of the wealthiest 20% in relation to that of the poorest 20% (S80/S20). The European average for this proportion was 4.4 in 2001, down from 5.1 in 1995. Despite a slightly more marked decline in Portugal from 7.4 to 6.5, there continues to be a considerable difference (see figure 6.5). Yet again, Greece, Spain, Italy and also United Kingdom and Ireland accompany Portugal for this indicator as the member states where inequality is higher than the European average (although only slightly in the latter case).

Gini's index is another commonly used indicator to determine inequalities (see figure 6.6); this varies between 100 if all the income has been earned by a single individual and 0 if every interviewee earns the same amount of income. Thus, the higher the Gini coefficient, the more unequally income is distributed. Portugal presented a figure of 37 in 2001 which places us 9 percentage points above the European average. It is of even greater concern to note that whereas there has been an improvement in the set of the EU15 from 31 in 1995 to 29 in 1998 and to 28 in 2001, the figure for Portugal is the same as it was in the first of these years, though it dropped slightly to 36 in 1998 where it remained until 2000, before rising again to 37 in 2001. Once again, we find the set of southern European countries and the British Isles below the European average, thus confirming their serious problem in terms of inequality.

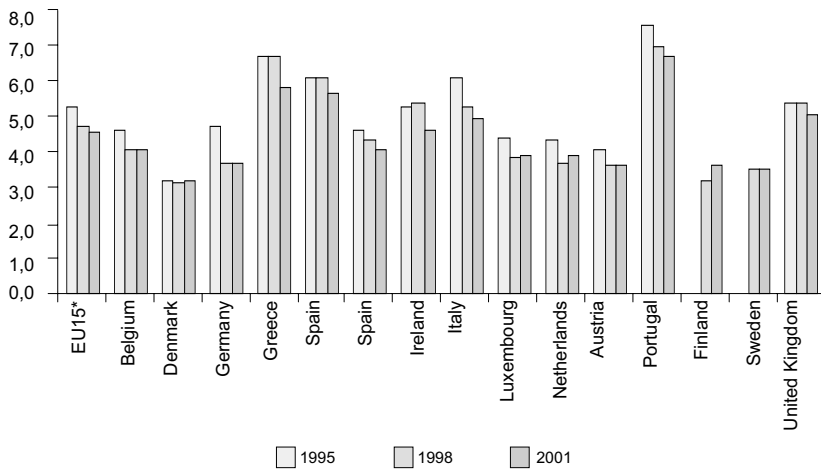


Figure 6.5 Interdecile ratio (S80/20) in EU15

Source: Eurostat, European Household Panel (2001).

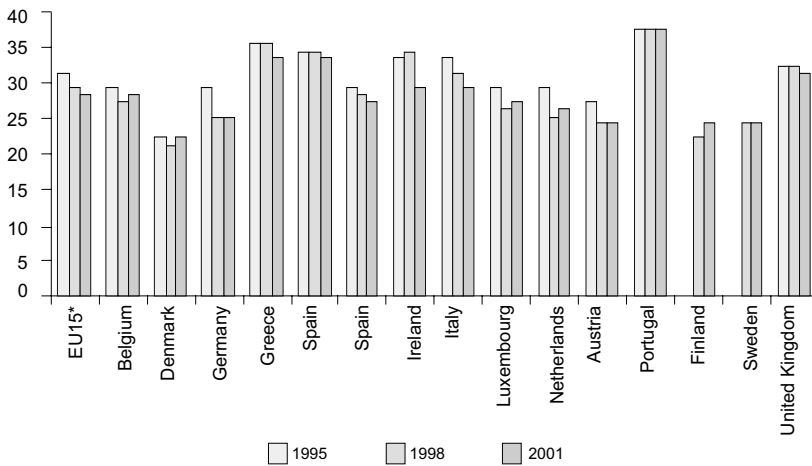


Figure 6.6 Gini's index

Source: Eurostat European Household Panel (2001).

Table 6.1 Social pension, minimum pension, minimum salary and average salary in relation to the poverty threshold (euros/year)

	1995	1998	2001
Poverty threshold (60% median) PPS	3,745	4,155	4,967
Social pension/year	1,222	1,599	1,833
General system minimum pension	1,927	2,186	2,514
Average net salary	8,176	8,804	10,206 [2,000]
<i>Minimum salary (general)</i>	3,631	4,085	4,679

Source: Eurostat, European Household Panel (2001); DGEEP-MFCSS (2002).

A more in-depth analysis of some additional indicators related to the composition of poverty in Portugal provides a clearer idea of the main factors that explain, in part, this situation.

Despite a 50% rise in the social pension between 1995 and 2001 (though as we have seen there was a more moderate growth — 32.6% — in the poverty threshold), this social protection measure did not exceed 36.9% of the poverty threshold in 2001 (see table 6.1). The situation is a little better when we look at the minimum pension under the social security system rather than the social pension. There was a 30.5% increase in this pension in the period of reference (less therefore than that of total incomes) which means it did not exceed 50.6% of the poverty threshold in 2001. The relatively low level of pensions is therefore one of the main poverty factors in Portugal. We recall that a total of 635,000 people were covered by the minimum (invalidity and old age) pension in that year while the social pension (invalidity, old age and subsistence) covered an additional 104,847 beneficiaries; although not all of these people are necessarily poor insofar as they can accumulate the pensions with other sources of income or live in households where the overall income is higher than the thresholds, there is an extremely high risk of their being in a situation of serious poverty. This is confirmed on analysing the incidence of poverty according to the source of income.

In the period between 1995 and 2001, the average salary in Portugal went up by roughly 24.8%, much more than inflation. Though the minimum pension in the general system and the social pension recovered in relation to the average salary, the distance continues to be extremely relevant. In fact, the average salary is 2.1 times higher than the poverty threshold. As for the (general) national minimum salary, it remains below the poverty threshold and the distance from it has become more marked despite rising more sharply than the average salary (28.9% between 1995 and 2001).

A key aspect of Portugal's model of economic activity is that there is a vast area where the main survival factor is low quality work and low paid work in particular. This explains why unlike the majority of the more developed European countries, working is not enough to put people beyond the

Table 6.2 Percentage of the population at risk of poverty per most frequent activity and schooling

	1995	1998	2001
Employed workers	10	9	10
Self employed	35	30	30
Unemployed	31	32	38
Retired	34	30	25
Other economically inactive	27	23	28
At risk of poverty, per educational level			
Schooling <= 9	26	23	22
Schooling = 12	10	7	8
Schooling > 12	1	1	2

Source: Eurostat, European Household Panel (2001).

Table 6.3 Risk of poverty among children, the elderly and women in the EU and Portugal (%)

	1995		1998		2001	
	UE	P	UE	P	UE	P
Risk of child poverty	21	26	19	26	19	27
Risk of poverty > 65 years	21	38	18	35	19	30
Risk of poverty among women	18	24	16	22	17	20

Source: Eurostat, European Household Panel (2001).

risk of poverty. On the contrary, as we can see in table 6.2, although this risk for employed workers is half that of the national average (10%), there are roughly 450,000 people in this situation.⁵ But the situation of self-employed workers is even more serious; they have a 30% risk of poverty, i.e. 10 percentage points over the average, which makes them one of the most vulnerable categories. It is true that there are very contrasting working conditions within this category and there is a greater likelihood of concealed income; nevertheless, it should be understood that this is where we find a large number of workers in activities such as construction, commerce, and personal and domestic services which explains to some extent their contribution to this particular incidence of poverty.⁶

Just as in all Europe, unemployment appears as one of the main at-risk-of-poverty factors. Poverty reached 31% among the unemployed in 1995, going up to 32% in 1998 and then raising to 38% in 2001.

5 The proportion of workers on low salaries (less than $\frac{2}{3}$ of the median) went from around 14% in 1995 to nearly 11% in 2000, which is similar to the number of poor workers (Albuquerque and Bomba, 2001).

6 Self employed workers represent 23.5% of the total employed population (INE, Employment Survey); 6% of these employ staff.

As might be expected given the abovementioned very low pensions, old age pensioners start the period in 1995 as one of the most vulnerable categories. Although this risk declined, it remained 5 points higher than the average in 2001. The “other economically inactive” people have an even greater “differential” of 8 percentage points and the risk increased in the period under analysis.

It is generally recognised today that qualification is one of the main domains on which the future of the quality of Portuguese society and economy depend. Despite progress, it is known that Portugal continues to have a serious qualification deficit and that this is becoming more marked and are deeply embedded; this is clearly demonstrated by indicators like the rates for early school leaving or participation in lifelong learning activities. It is therefore a strategic dimension when considering a social and economic system but also when we look more closely at the consequences in people’s lives. It is noted that poverty is 2 percentage points above average among people with less than the 9th Grade of schooling. The incidence of poverty goes from 22% among this group, to 8% among people who completed secondary education and drops to 2% among those who have completed more than the 12th Grade.

Table 6.3 confirms that gender and age are also relevant factors. In fact, unlike any other country in Europe, women alone reached exactly the same figure as men thanks to a decline in the poverty risk in 2001 from 24% in 1995 (when the average was 23%) to 20% in the last year when statistics were available.

As for the different age groups, the particular vulnerability of the elderly must be stressed. They had a 30% risk of poverty in 2001 compared with 19% in the EU where this category is generally more vulnerable than the rest of the population; however, the figures for Portugal declined from 38% in 1995 to 35% in 1998. The opposite evolution is found among children. This deserves very special attention as it configures a situation in which the phenomenon is reproduced and maintained in the future. Indeed, the risk of child poverty was already above average in 1995 when it was 26% and it remained at this level in 1998 before rising to 27% in 2001. The 12 percentage point difference in relation to the elderly at the start of the period declined to a 3 point difference in 2001; in other words, the contribution of the older generations to the average levels is being partially substituted by children. This means that there is no sign of the generational “break” from poverty that should be the aim of any country guided by values of social solidarity and justice.

The family organisation is generally believed to be another factor that provides insights into the vulnerability to poverty. Indeed, the family can be the anchor that sustains life projects, a field of personal investment and personal and emotional fulfilment that offers countless opportunities of social integration, shared resources, the sustaining of rewarding identities and esteems. However, it can be precisely the opposite. If the resources are too limited for the size of the household, if affection is not freely given but is substituted with more or less tyrannical bonds, if scarcity governs resources, if it is a place of violence instead of a

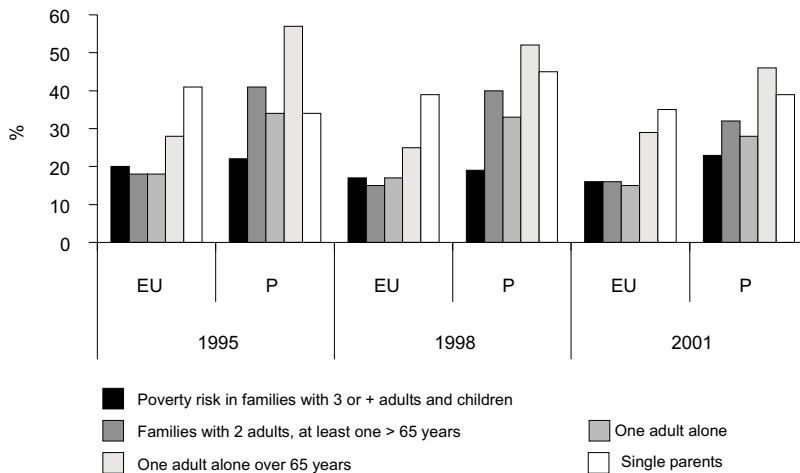


Figure 6.7 Risk of poverty and household composition

Source: Eurostat, European Household Panel (2001).

Table 6.4 Risk of poverty according to area of residence

	Incidência do risco de pobreza	Proporção do total de pobres	% da população total
Total	19.2	—	100.0
Urban areas	13.3	40.0	55.0
Semi-urban areas	18.8	35.0	30.0
Rural areas	29.4	25.9	15.0

Note: the data in this table are not in the European Household Panel that we have been using so far for the purpose of comparability with Europe as it does not allow territorial breakdowns; the data presented result from the last application of the INE's Household Budget Survey (2000).

Source: INE (Statistics Portugal), *Household Budget Survey*, 2000.

context that guides decent values, attitudes and life projects, if loneliness is greater than socialisation, then the family may not constitute an anchor but may, on the contrary, be the factor that reproduces poverty.

It is obvious that the transformation dynamics of family structures and their multiple consequences are too complex to be taken from a simple set of statistical indicators. Nevertheless, an association can be drawn between certain family composition profiles and the differentiated probabilities of being at risk of poverty.

The outstanding findings from figure 6.7 are well known due to administrative data resulting from social policies like the Guaranteed Minimum Income (Capucha *et al.*, 2005): single parent families are particularly

exposed to the risk of poverty. While poverty affected 20% of the population in Portugal in 1995, the poverty rate among single parent families was 34%. This rose to 21% and 45% in 1998 and then fell to 20% for the population as a whole and 39% among single parent families in 2001. The situation in Portugal is not very different from Europe on this point where the risk of poverty in these families was around 41%, 39% and 35% in the same 1995, 1998 and 2001.

As we have already seen, age is an important factor. This is crossed also with the isolation to which many elderly people are subjected. An adult living alone and over the age of 65 years had a 46% poverty risk in 2001 (29% for the EU15). The decline since 1995 (57%) and 1998 (52%) does not make the gravity represented by this problem any less stark. It is true that adults living alone who are not elderly (aged 15-64 years) are also generally more penalised than others (the at-risk-of poverty rates were 34%, 33% and 28% respectively in 1995, 1998 and 2001), but there is still quite a striking distance from the rates of the elderly living alone. Indeed, even if they live in a two-adult household, the poverty rate is 12 percentage points over the average when they are over the age of 65 years (despite the decline in the rate for the period under analysis, the difference is 20% to 32% in these households in 2001). It is underlined that the at-risk-of-poverty rate for households with two adults and no children where both were under the age of 65 years was 13% in 2001, i.e. 19 percentage points lower than the same sized households but with at least one elderly person and 7 percentage points below the general average.

Families with two adults and a child (under 16) have a 9% at-risk-of-poverty rate (down from 13% in 1995), which is below the EU15 average (10%). In contrast, large families with 3 or more adults and with children have a 23% risk of poverty (up from 22% in 1995), compared with a European average of just 16%.

Poverty is not distributed uniformly across the country. As generally speaking the poverty factors are actually the "normal" development processes of Portuguese society. In fact many of the most vulnerable categories, e.g. pensioners, isolated people, single-parent families, the least qualified, low paid workers, do not contrast with the remaining population and can therefore be spread across the country. However, as these and other vulnerable categories have scanty resources and affinity with the choice of effective housing opportunities, they tend to group together in rundown areas which therefore become places with a greater concentration of poor groups. This happens in various kinds of rundown neighbourhoods that contrast with the urban or semi-urban milieu or with depressed rural areas in the rural interior where poverty is continuous in relation to the context.

This can be perceived from table 6.4. The incidence of the poverty risk in the rural setting is 29.4%, i.e. 9 percentage points higher than the national average and more than double that of the urban environment (13.3%). The areas

Table 6.5 Risk of poverty and poor population in the regions in Portugal

	Total	North	Centre	Lisbon	Alentejo	Algarve	Azores	Madeira
Resident population	10356117	3687293	2348397	2661850	776585	395218	241763	245011
Poverty risk according to monetary income	19.2	20,5	24,0	12,0	22,5	25,0	34,0	34,0
Weight of region in total of poor people	100.0	36,4	27,1	15,4	8,8	4,8	4,0	4.0
Number of poor people	1,988,374	755,895	563,615	319,422	174,731	98,804	82,199	83,304
Poverty risk according to total income	17.9	18.0	18.5	12.5	22.0	23.5	35.0	33.0
Number of poor people	1,853,745	663,712	434,453	332,731	170,849	92,876	84,617	80,854

Source: INE (Statistics Portugal), *Household Budget Survey*, 2000.

known as “semi-urban” are near the average with the poverty rate standing at 18.8%. It is noted however that, given the concentration of the population in urban areas, it would be a mistake to place too much importance on the phenomenon in areas where it is more blurred. In fact, 40% of poor people and families live in an urban setting, 35% in semi-urban and the remaining 25% live in rural regions.

So, when we study the regional dispersion of poverty we find that is not always the regions with the highest poverty rates that have the greatest absolute number of poor people. Thus, if we look just at monetary poverty, the Autonomous Regions of the Azores and Madeira, where the poverty rate is 34% compared with 19.2% in the entire country (according to the INE’s Household Budget Survey), are by far the most seriously affected by the risk of poverty; however, the weight of the poor in these regions is just 4% of that of the country as a whole in both cases. The Algarve (25%), the Alentejo (22.5%) and the Centre (24%) have above average rates but while the Centre contributes more than a quarter of the poor in Portugal, Algarve’s contribution is 4.8% and Alentejo’s 8.8%. The monetary poverty rate in the North is close to the average but it contains the largest amount of poor people (36.4% of the country’s total). Lisbon is the only region where poverty is below the national average (12%), but is third in terms of the contribution to the national total with more than 319,000 poor people.

Turning now to poverty measured not by means of monetary income but based on total incomes, we can see that the general structure does not change. The total risk of poverty falls 1.3 percentage points due to the greater impact of non-monetary income in the Centre Region (5.5 points less) and in the North and Algarve (1.5 less). The Azores are the only region where the risk of poverty increases when the total income is considered.

The figures *per se* that we have presented are not as important as what they tell us about the economic and social dynamics that produce them. We can conclude from the analysis of the data that although living conditions have unquestionably improved in Portugal, it remains one of the most vulnerable countries to poverty in the European context. Indeed, it is the country of the EU15 with the most unequal distribution of income and also where poverty depends least on conjunctural fluctuations in the life trajectories of people and families but is persistent, structural and deeply embedded in the social and institutional systems.⁷

Factors like patterns of economic specialisation, the inequality of wages, low incomes from bad quality employments, low levels of qualification of the active population (to which the performance of education and training systems is linked), the productivity resulting from these organisational patterns of the economy and the labour market are responsible for the incidence of poverty among categories like low paid workers, the self employed and less qualified people generally.

The limitations of the social protection system, particularly with regard to the amount of the benefits and the limited impact of social transfers for the most disadvantaged make categories like the unemployed, old age pensioners and other people living on pensions or other social benefits vulnerable.

The performance of the health and above all the security and social protection systems both in relation to schemes for the substitution of primary income e.g. pensions and other social action and solidarity schemes, has a limited impact in reducing poverty. Moreover, it is confronted with new challenges, namely those resulting from deep-seated changes in demographic and family structures but have a short and midterm effect on the fragility of the responses and facilities available for isolated people (in particular dependent and elderly people), for single parent families and particularly for children that make up the particularly vulnerable categories.

The territorialisation dynamics of the poverty factors also has a specific effect on the evolution of the indicators of the Portuguese situation. In fact, we can speak of depressed rural zones where realities like economic depression, demographic depression the ageing population, increased cost of investments and facilities, the loss of the ability to put pressure on the system due to the declining population and the loss of residents' "political capital" converge in a systemic and self-reproducing logic; but equally we can speak of the urban zones with a concentration of vulnerable groups that contrast strongly with the milieu and where the negative effects of a bad reputation often combine with a tough socialising environment and the total or relative

7 For an analysis of the factors, the vulnerable categories and lifestyles of poor families, see Capucha (2004).

lack of facilities which make people close themselves in “installed poverty cycles”. Indeed, the territory plays an undeniable role in the characterisation of poverty and exclusion in Portugal.

In addition to these systemic factors that are objectively inscribed in the institutions and opportunities for access to decent living conditions and the way they are expressed in the material living conditions of people and families, there is also a set of subjective factors with relevant practical consequences and involving both the cultural backgrounds running through Portuguese society today and also the mindsets of the vulnerable groups.

Prejudiced representations of people in a poverty and exclusion situation remain, despite the growth in the values of well-being and social justice as well as the strong perception of poverty and social inequality as inherited conditions;⁸ the removal of decisive actors like certain public organisms and companies in relation to social responsibility; the lack of awareness among strategic agents to the problems of the vulnerable groups and to the importance of responding to their needs; the changing forms of socialisation and the growth of individualistic values and in particular narcissistic and therapeutic mindsets; the rising perception of risk (of unemployment, non-achievement in school, inability to integrate in the labour market, being the victim of violence or various other kinds of abuse); the inability of disadvantaged groups to mobilise themselves and take collective action in defence of their interests; the ambivalent nature of network organisations that include and exclude on the basis of segmented quality attributes; the de-valorised self image and negative self-esteem; the inability to deal with anxieties and failures; accommodation to degraded living conditions and the orientation towards short term survival. This set of factors is just as relevant as the so-called material conditions.

The approach to the factors proposed here allows us to move away from the parameters defined by the limits of statistical indicators, and embrace situations and categories which the general statistics do not reveal and few specific studies have been concerned with. Indeed, certain categories affected by material phenomena linked to both the workings of institutions and also to relational and symbolic factors not unveiled by statistics are very often the more visible face of poverty. We are speaking of categories like the homeless, children at risk, drug addicts, prisoners and former prisoners and the disabled.

The different categories vulnerable to poverty tend to adopt patterns that are actively related to their material living conditions that differentiate the way in which they live their poverty situation.

In short, workers with low qualifications but who have a relatively stable job tend to develop attitudes, lifestyles, cultural models and to favour

8 As demonstrated by the 1999/2000 wave of the Survey of Values in Europe and the 2002 Eurobarometer (see Ferreira, forthcoming).

social relations that sustain projects of “investment in mobility”,⁹ both in a more immediate way through professional promotion (currently threatened by increasingly precarious labour relations) and also more indirectly by efforts (that are made more difficult due to weaknesses in the education system) to support the schooling of their children.

Peasantry and partial peasantry are an important part of those living in depressed rural areas. As statistically they are mainly independent and retired workers, they generally develop what has been designated a “saving” lifestyle, characterised by a life governed by defending themselves for the future both in terms of preparing protection for their old age and maintaining family heritage; this involves restricting the consumption of their few resources and developing multiple activities and incomes which are important phenomena for peasantry to adapt to a rapidly changing world.

A category not captured by the statistical sources is that of immigrants. Their professional insertion, extreme lack of consumption opportunities and space occupation models are all similar to those of poorly qualified Portuguese workers in industry, construction and services (often subject to unstable labour market dynamics), the long term unemployed, rural workers and old age pensioners who were in these categories during their working lives. However, whereas these categories are all more or less resigned to putting up with “restrictions” and their unawareness of the injustice of their situations stops them from mobilising the energy required to break out of these conditions, the very decision to immigrate is indicative of this group’s position of wanting to escape from their poor past; at the same time, they develop a “dual reference” to their society of origin and to their host society and associate life strategies to this aimed towards the future — feeding the myth of return — and placing importance on symbolic and relational practices that mark the life path and strengthen solidarity among their peers.

“Conviviality” life styles emerge among in the cities’ traditional neighbourhoods and in social housing quarters. From the statistical standpoint, the people and families living there may be placed among the wide-ranging categories of poorly qualified workers and more or less permanent, intermittent or downhearted unemployed. Some of these people and families belong to more or less underground areas of the economy, frequently set up in the framework of their resident community where this life style organises alternative sources of income to those of the official market and imposes organisation and socialising rules fitting to their interests. As they demonstrate a great ability to produce traditional cultures and particularly intense and sometimes excessive

9 This designation was first used in a typology developed by Almeida *et al.* (1992), which integrates most of the “lifestyles” referred in the following paragraphs. An updated version is found in Capucha (2005) in which a detailed analysis is made of each type of poverty lifestyle summarised here.

socialisation, this lifestyle is characterised by the orientation towards the hedonistic present lived in accordance with consumption expectations distinguished by great visibility in relation to other social milieu. The recurrent frustration of these expectations which are nearly always explained by fate, “bad luck” or chance is periodically interrupted when occasional and sporadic resources are obtained and consumed in an exuberant way that is symbolically the inverse of their daily poverty, in the same way as their “conviviality” lifestyle is sporadic and unstable.

The poverty statistics are also unable to capture the way in which categories like prisoners and ex-prisoners (statistics of poverty do not include institutionalised people) or drug addicts experience poverty, or young people at risk — many of whom come from low income families and often from large or single-parent families. Besides relative youth and skills like “conviviality” that they possess to live from the most diverse experiences, this group is best characterised by being “unaffected” by the normative standards and value systems most commonly shared in society, living a more or less marginal life in relation to the current institutions and developing their own cultural values and specific social organisation rules within the peer groups.

Lastly, the homeless also live a marginal life from the current institutions like family or organised work from which they break away, though exceptions are found to the latter. Sometimes simultaneously drug addicts, ex-prisoners or others marked by a past of exclusion, they rebuild their lives on the streets in the worst conditions lacking human dignity and lead a lifestyle that rests on networks of fierce competition for extremely scarce resources and dependent on public and private charity to which they conform. They share this total “deprivation” of personal dignity and the condition of citizenship with people who are part of extended and “disorganised” families who, marked by very diverse life paths and problems like alcoholism, disability,¹⁰ the erosion of basic skills to participate in the various basic contexts of social life, live in the most abject poverty in conditions that place their very survival at risk.

Social exclusion marks the day to day of all the lifestyles of poverty, be it more intense and comprehensive or more partial and alleviated. On one hand, this is due to the logic that determines how the current institutions and systems for the distribution of material and symbolic resources are run and also to the way in which they create certain kinds of injustice expressed in the living

10 The vast majority of the disabled do not follow this lifestyle; this is explained to a great extent by the fact that disability is a very powerful poverty and exclusion factor and there is therefore a rehabilitation system that has been producing results of social and professional integration, of making life dignified and granting skills for autonomous life that have had positive impacts (Capucha *et al.*, 2004). The greatest problem is when families are so “deprived” of the most elementary social action skills that they do not even know how to search for access to rehabilitation resources.

conditions of the most disadvantaged groups and closing opportunities to social participation. On the other hand, it is also due to the way the people in these groups actively relate with these conditions and to the attitudes, dispositions and (in)ability with which they face these opportunities or lack of them.

The result of this set of factors is indeed the breach of the social contract that should link citizens to the rights of participation in patterns of decent well-being and to duties to contribute to collective life. Exclusion from the world of work or limited access to lower quality segments of the labour market; the distance from basic social facilities and infrastructures; belonging to families and communities marked by negative identity and the poverty of social and affective relations; living in depressed or disreputable territories; experience of non-achievement in school or the lack of qualifications required to adapt to the changes occurring in the modern world; restrictions of income that permit consumption in line with the minimum standards of quality; greater exposure to the risk of contracting illnesses, victimisation of violence in the most varied forms and the adoption of addictive and marginal behaviours; a life marked by traumatic cultural, relational and affective experiences — these are some of the most common situations of social exclusion from the rights of citizenship to which all citizens should have access.

What are the consequences of this exclusion? First and foremost, they represent the experience of humiliation and need for the people who are severely penalised by exclusion whether they adapt to or are outraged by the situation, are resigned or cannot conform to it. But the existence of these situations for society as a whole is intolerable. Firstly, because it is an affront to the democratic ideal of equal opportunities and social justice that legitimates the political and social system. Secondly, because the permanence of poverty and exclusion reveals the existence of problems which, if resolved, would not only benefit those penalised but also society as a whole. A labour market able to provide more and better jobs to the most disadvantaged is a better organised market from which all workers would benefit; a better qualified, healthier and more secure population would be more productive, better able to participate in innovation, more adaptable and receptive to flexibility; health and social protection services that respond to the needs of the most disadvantaged would work better for everybody. Better equipped territories with a more positive environment would be safer and more capable of attracting people and resources and would provide better living and working conditions for men and women. These are just examples from a long list of reasons why the transition of the Portuguese society to the knowledge economy and information society can only be achieved with greater social cohesion and if the problems of poverty and social exclusion do not hold a central position on the agenda of political, economic, cultural and social change in the country.

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Where is African immigration in Portugal going? Sedentarisation, generations and trajectories

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Introduction

In the transition to the 21st century, the migratory system in Portugal has witnessed considerable changes that have intensified and diversified the flows of people arriving and departing.

Between 2000 and 2001 we registered the surprising phenomenon of massive immigration from Eastern Europe, the arrival of a second, substantial wave of Brazilian immigrants and, though more limited, the continued entry of African immigrants. Over 5% of the resident population is now composed of legal immigrants, which brings Portugal's foreign population close to the average for the main European countries of immigration.¹

On the departures side, there is no longer any doubt that the country is experiencing a new period of intense emigration, in various forms, to old and new destinations, particularly in Europe. This is not unrelated to the economic and employment crisis of recent years.² Though it often seems to have been forgotten, Portuguese emigration is in fact the "structural constant" identified by Vitorino Magalhães Godinho (Godinho, 1978). If the circumstances are favourable for departure and, in other places, for arrival, the social networks and cultural dispositions are there to set new flows in motion, like those of today, at the proper time.

In parallel with these new entries and departures, it is to be noted that many other immigrants are living in Portugal for 15, 20 or more years now and reveal no significant signs of returning to their countries of origin. On the contrary, the signs indicate that they have settled. This is particularly the case of African immigration, which is the subject of this text.

1 For the development of immigration, see Pires (2002 and 2003). For immigration from Eastern Europe, see Baganha, Marques and Góis (2004).

2 For the development of Portuguese emigration, see Peixoto (1999) and Baganha (2000).

The sedentarisation of African immigrants in Portugal is now a fact and not just a tendency. Accordingly, it is possible to talk about the facts of sedentarisation, which are demonstrable on the basis of various objective indicators.³

Though there are examples of a return to home countries, transnational mobility or re-emigration to other European Union countries, the most common process is for Portuguese-speaking African immigrants and their descendants to settle in Portugal more or less for good. In fact, it is a process through which many migrant populations have passed in countries of earlier and larger immigration, within and outside Europe, e.g. the U.S.A., the United Kingdom or France.

The first part of this text presents various sedentarisation indicators for African populations living in Portugal. They show that large segments of those populations have already passed through the first stage of the migration cycle, typically represented by the figure of the lone immigrant whose insertion into the host society is essentially limited to the labour market. For most of the people involved, this stage belongs to the past, though this does not mean that there are no newcomers simultaneously taking their first steps in Portuguese society.

The second part of the text analyses trajectories and transitions. Rather than characterising the presence of African populations in Portugal synchronically, it is now time to begin a diachronic analysis, identifying the socio-occupational trajectories of first-generation immigrants, on the one hand, and their descendants' processes of transition to adult life, with particular attention to the dynamics of intergenerational social mobility, on the other.

What socio-occupational trajectories do the earliest immigrants have? Have they remained in the least-skilled segments of the labour market, where they were concentrated at the beginning of their stay, or have they managed to move on to other occupational activities? And their children? Are there significant differences between the two generations in terms of their life conditions, educational capital and occupational situations?

The answers to these questions will tell us where African immigration in Portugal is going and help us to assess to what extent the people involved are integrated into Portuguese society.

The facts of sedentarisation

The concept of a migration cycle, developed by Felice Dassetto (1990), helps us to understand how the sedentarisation process operates among labour

3 African immigrants in Portugal are, essentially, Portuguese-speaking. In 2004, immigrants from African countries with Portuguese as an official language (PALOP, in Portuguese language), represented 94% of Africans with residence permits.

migrants and their descendants. Keeping in mind that migratory processes will not always be linear and migrant populations will not all necessarily pass through the same stages, it is a useful model for empirical research.

In the first stage, before families are reunited or started in the host society, the immigrants' lives are basically organised around work. Later, when families have been reunited or new families started and a generation of descendants is being formed, daily life begins to develop in a number of social areas, not only in the labour market but also in school and other public spaces. At the same time, sociabilities are extended within and outside the peer group.

In the third stage, which the author only considers to begin three or four decades after arrival, migrants come to be seen as full members of society, who will have to be taken into account in the future. The main issue is "societal co-inclusion", with the indigenous and migrant populations "being led to include the other in social practices and in the organised social images that each actor possesses" (Dassetto, 1990: 32).

If only a small part of the African populations residing in Portugal fit into the third stage of the migratory cycle, nowadays those in the first stage are also a minority. It may be expected that the latter do not settle or that they re-emigrate or return to their home-countries. For those in the second or third stage, however, what is to be expected is sedentarisation.

In summary, speaking of sedentarisation is like speaking of a point of no return reached by immigrant populations in the process of social inscription in the host countries. Clearly, not all immigrants reach this point of no return, even when they spend 20 or 30 years in the countries to which they have emigrated. The number of departures when working life has come to an end may be significant, depending on the actual conditions that each home-country offers at this level and the tally that each person makes of the advantages and disadvantages of going or staying.

With regard to the descendants of immigrants, however, the point of no return is almost automatic, with the possible exception of those who return to their origins with parents when they are still children. Strictly speaking, the idea of returning to their "origins" is not applicable to the many that were born in the host countries. For them, the point of no return is the moment they were born.

What, then, is the data for the sedentarisation of African immigrants in Portugal?

Among other aspects, it relates to the evolution of the overall number of immigrants and their socio-demographic recomposition, the number of descendants of immigrants, born here or arriving as children, and naturalisation rates (table 7.1).

Between 1986 and 2004, the number of citizens of Portuguese-speaking African countries (PALOP) living in Portugal grew steadily from around

Table 7.1 Indicators of African immigrants sedentarisation in Portugal

<i>Number of PALOP immigrants (1)</i>			
Year	Number	Year	Number
1986	36,799	1996	77,114
1987	37,665	1997	77,600
1988	38,900	1998	78,291
1989	41,114	1999	84,930
1990	43,297	2000	93,838
1991	45,795	2001	116,743
1992	49,713	2002	130,378
1993	52,883	2003	136,430
1994	68,945	2004	140,530
1995	75,316		

<i>Proportion of males (%) (2)</i>			
Year	Proportion (%)	Year	Proportion (%)
1986	60.8	1996	61.8
1987	60.5	1997	61.7
1988	60.3	1998	61.3
1989	60.2	1999	60.7
1990	60.0	2000	59.8
1991	60.1	2001	58.8
1992	60.6	2002	57.9
1993	60.5	2003	57.4
1994	62.4	2004	56.9
1995	62.1		

<i>Descendants of PALOP immigrants 15-24 age-group (2001)</i>	
With PALOP nationality	19,885
With Portuguese nationality and place of birth in an PALOP	9,257
With Portuguese nationality and place of birth in Portugal (estimate) (3)	23,728
Total	52,870

<i>Naturalisation</i>		
Year	Naturalisation requested (no.)	Naturalisation granted (no.)
1999	808	402
2000	1,118	896
2001	1,518	768
2002	2,471	920
2003	2,970	1,576
2004	4,297	1,187

<i>PALOP immigrants and descendants with Portuguese nationality (2004) (%) (4)</i>	
Young people aged 15-29	55.7
Fathers	44.7
Mothers	45.2

(1) This numbers includes holders of residence permits and holders of permanence permits. (2) The proportion of males was only calculated for the holders of residence permits, since, at the time the data was collected, the statistical information of the Serviço de Estrangeiros e Fronteiras (Borders and Foreigners' Service) made no gender distinction among the holders of permanence permits. (3) Estimate based on data from the Jodia project ("Young Descendants of African Immigrants: Transition to Integration or Social Exclusion?"), for which a questionnaire survey was carried out in 2004. It involved 1000 descendants of Portuguese-speaking African immigrants aged 15-29. The project was carried out in CIES, between 2003 and 2005, with funding from the FCT (Science and Technology Foundation). The team responsible was made up of Fernando Luís Machado, Ana Raquel Matias, and Sofia Fontes Leal. (4) Jodia project data. N=1000.

Source: INE, *Recenseamentos Gerais da População, Estatísticas Demográficas*; SEF; *Jodia Project*, CIES, 2004.

37,000 to nearly 140,000. That is an increase of 282%, which corresponds to an average annual growth rate of 8%. This development well demonstrates the sedentarisation process in progress. It shows that, year after year, there are many new arrivals and few departures.

Since we are talking about labour migrants, a return to home-countries is not very common in the first years after the migratory flow has been established. But, supposing that the objectives that determined the immigrants' coming to Portugal have been achieved by the earliest ones, the number of departures would be expected, more than two decades after the flow began, to reach a significant figure. But that is not happening. As far as the official statistics show, the number of departures recorded in recent years is negligible.

Another indicator of sedentarisation is the socio-demographic recomposition that African immigration has seen in this period of almost two decades, both in terms of gender and age. As the residence period gets longer, the proportion of males starts to fall and the figures gradually move towards the balance that usually characterises demographically stable populations.

This is easy to see if we take the mid-1990s as the reference point, i.e. the time when the entry of African immigrants began to intensify.

Between 1994, the year after the first legalisation process for illegal immigrants, which officially confirmed Portugal as a land of immigration, and 2004, the proportion of males fell from 62.4 to 56.9 per 100 immigrants. It is a fact that before 1994 this rate has been lower than the first figure, around 60%, but in that phase African

immigration did not so overwhelmingly involve labour migrants nor was it as large as it became later. For this reason, the proportion of women was slightly higher.

The presence of more women in the populations under analysis means that family reunification is taking place (Fonseca, 2005). This, in itself, contributes to an extension of the residence period and accentuates the trend towards sedentarisation. Furthermore, it means that the internal marriage market for immigrants is larger, either because of the arrival of women without a family or because the daughters of earlier immigrants reach adulthood. This situation offers more opportunities for starting a family and has the potential effect of fixing the immigrants in Portugal.

With regard to age-group recomposition, the main change has been the increasing number of children and young people, an increase that lowers the disproportionate demographic weight of young adults typical of the first stage of the migration cycle. This increase has three sources: children who come to Portugal under family reunification arrangements, children born in Portugal in families that have regrouped and children born in Portugal in new families started here. This is to say that, as the residence period lengthens, the overall expansion of immigrant populations is no longer only due to

new arrivals, which may continue at a relatively regular rate, but also, increasingly, to the birth of descendants in the host society.

At present, the number of descendants of African immigrants living in Portugal is very high. Data from the SEF (Borders and Foreigners' Service), which officially registers foreigners' migratory movements, is far from portraying the growing quantitative weight of children and young people of African origin.

This is due, in the first place, to the inadequacy of the administrative and statistical coverage. There is no certainty that all the children born in Portugal of African immigrant parents are registered with the SEF, at least in the first years of their lives. This is also because entry into the educational system does not demand this documentation, precisely to avoid the exclusion of children without the necessary papers. The second reason is that many of the children are Portuguese from birth: it is only necessary for one parent, whether a native or an immigrant, to have Portuguese nationality — which is quite often the case. The final reason is that many children become Portuguese later, by naturalisation.

As table 7.1 shows, in the 15-24 age group alone we can estimate the descendants of Portuguese-speaking African immigrants at over 50, 000, including those who have the nationality of a PALOP or the Portuguese nationality, in the latter case whether born in an PALOP or in Portugal.⁴ To these we should add those in a higher age group, who are not particularly numerous as

4 The 15-24 age group was selected for compatibility reasons between the empirical information sources available for this calculation, i.e. the data from the Jodia project, mentioned earlier, and the 2001 General Census. The Jodia data shows how many young people were born in Portugal with Portuguese nationality. On the basis of this information, it is possible to estimate the weight of this specific segment in the universe of the children of African immigrants. This estimate cannot be made using the Census, since it does not distinguish these young people from the rest of Portuguese youth. In order to be able to add this subset to the other two (young people with PALOP nationality and young people with a PALOP as their place of birth but Portuguese nationality) it was necessary to consider this age group alone. The upper age limit of 24 was fixed on account of other methodological constraints. In the Jodia project, those above this age are certainly children of immigrants, since the sample was defined in that way. In the 2001 General Census, if we count the individuals above this age who were born in a PALOP country and have Portuguese nationality, this would prevent us from distinguishing two completely different categories, from the sociological point of view: children of African immigrants and those of the Portuguese returnees, who were born in the ex-colonies and later returned to Portugal. If the age of 24 is established as the limit, this means that people born after 1976 are involved, which also means that the number of cases from the second category possibly included in the count is negligible. Few Portuguese will have had children in the PALOPs after this date. The age limit of 24 is also justified when we count the young people who were born in the PALOPs and have a foreign nationality. If the people above this age and with this profile in the 2001 Census were counted, this time the offspring of African immigrants, who arrived as children, could not be distinguished from young immigrants who arrived recently in Portugal, who are very numerous in the 25-29 age group.

African immigration has not been long enough established for this group to be a large one, and those in a lower age group, who, in contrast, make up a large number.

According to the 2001 General Census, at that time there were 15,079 individuals aged 0-14 with the nationality of an PALOP and 1,916 individuals in the same age group who were born in those countries but have Portuguese nationality. A third subset, which is not identifiable in the census, is missing — those children of immigrants who are born in Portugal and have Portuguese nationality, either because one of their parents already had it when they were born or because they acquired it later.

That subset is, undoubtedly, not small. Reasoning by analogy from what happens in the next age group, aged 15-24, in which, according to the estimate made, this subset is the largest of the three, we can make a new estimate. If it is kept in mind that access to Portuguese nationality by naturalisation increases with age and will not, therefore, be so common in the 0-14 age group as in the higher groups, it can be said this subset may represent between 10,000 and 15,000 individuals. If we take everything into consideration, we are dealing with an overall figure of 80,000 to 90,000 descendants of African immigrants, counting the children and the young people up to the age of 29.

Another important indicator of sedentarisation is the acquisition rates of Portuguese nationality.

The survey of children of African immigrants, mentioned above, revealed that 56% of the 1,000 respondents are Portuguese citizens; the corresponding figure for both the fathers and mothers of the respondents is 45% (table 7.1). Corroborating these results, research carried out in 1998 on Cape Verde residents in Portugal, using a questionnaire survey for a sample of 1,417 individuals, showed that 42% of the respondents were Portuguese and 6% had dual Portuguese/Cape Verde nationality (Gomes, 1999). A third piece of supporting information is the result of a survey carried out in 2004 on 300 Cape Verde immigrants aged over 35, in which 56% stated that they have Portuguese citizenship.⁵

In their turn, the figures for naturalisation applications in the period for which information is available are also revealing. Though the political authorities have not exactly been “open-handed” in granting Portuguese

5 A survey carried out within the scope of the Limits project (*Immigrants and Ethnic Minorities in European Cities. Life-Courses and Quality of Life in a World of Limitations*), funded by the European Commission. The project was carried out in five European cities (Vienna, Bielefeld, Amsterdam, Uppsala and Lisbon) between October 2002 and March 2006 and was co-ordinated by the *Centre for Social Innovation* in Vienna. Portuguese partnership was the responsibility of CIES, under the coordination of Fernando Luís Machado and Maria Abranches.

citizenship to immigrants, applications rose from 808 to 4,297 between 1999 and 2004.

The annual number of applications accepted is certainly quite a lot lower. But one consideration to be taken into account is that the average time to process a dossier is protracted, with many cases still pending. The fact that the great majority of applications are submitted by Africans — between 76% and 87% for the period under analysis — shows, on the other hand, that they are further ahead in the process of sedentarisation than any other immigrant population.

In this context, it should be remembered that access to Portuguese nationality by immigrants, and especially their descendants, has not only been achieved through naturalisation. Many children and young people of African origin are Portuguese not because they have been naturalised but because they have acceded to the original nationality through their parents or grandparents, who, in some cases, have the nationality by right and, in others, have at some point become naturalised.

Furthermore, following the amendment of the nationality law in February 2006, which has made access less difficult for the children of immigrants, it is to be expected that many other children and young people of African origin become Portuguese, thus conferring legal recognition on their *de facto* ties with the national community.⁶

Acquiring or applying for Portuguese nationality, or intending to do so, does not necessarily imply that the person intends to live in Portugal. It is, however, a clear sign that this is the case. Immigrants' acquisition of host-country nationality has expressive and instrumental reasons. If, on the one hand, there is a sense of national identification connected with this decision, even if it is not exclusive, on the other, there are practical advantages at various levels, which many may take into consideration.

But whatever the weight of either of these reasons in each particular case, nationality is always a bond that turns immigrants into *ex-immigrants* and virtually fixes them in the country. Even if they re-emigrate, taking advantage of the greater freedom of movement that citizenship offers, or return to their "origin", this tie, which is also a personal and family resource, is always there.

A last indicator of sedentarisation, which it is worth mentioning, is marriage or cohabitation between the indigenous and immigrant populations.

6 The new law partly adopts the *ius solis* principle (based on the place of birth), granting Portuguese nationality directly to children of immigrants who are born in Portugal, provided that one of their parents has been a legal resident in the country for at least five years. It also grants the Portuguese nationality to the children of immigrants having lived in the country for over 5 years and having completed the first cycle (4 years) of compulsory education.

Besides signifying, in most cases, that the immigrant part of the relationship is virtually settling for good in the host-country, it is also one of the most unambiguous indicators of integration. It is known that this kind of mixed marriage and cohabitation is growing in Portugal (Rosa, Seabra, and Santos, 2004; Fonseca, 2005).

Nonetheless, this situation is difficult to measure, in view of the statistics available. Besides omitting cohabiting couples, the exploitable source, the Statistics Portugal's *Demographic Statistics*, registers only the nationality of married couples. This is not enough to tell whether, in fact, mixed relationships are involved, that is, mixed in the inter-ethnic sense of the term. Marriage between nationals and foreigners can be intra-ethnic, if the nationals are of the same ethnic origin as the foreigners, and marriage between nationals can be inter-ethnic, if one of the parties is not of the indigenous stock.

Trajectories and transitions

In the light of the established fact that African immigrants is sedentarised, of which eloquent indicators were presented, the next step in the analysis is to seek to ascertain the consequences and impacts arising from that sedentarisation.

They exist at different levels, beginning with the demographic effects. A recent study shows that immigration accounted for a fifth of the rise in population between 1991 and 2001, contributed to re-establishing the gender balance in the resident population and to bolstering the size of the active workforce, and diminished the aging at the top of the demographic pyramid (Rosa, Seabra and Santos, 2004: 119-120).

Equally visible is the contribution that immigration makes to the state budget (D'Almeida, 2003) and the national economy (Ferreira and Rato, 2000; Ferreira, Rato and Mortágua, 2004), as well as its impact on the labour market (Baganha, Ferrão and Malheiros, 1999 and 2002; Peixoto, 2002) and business activity (Carvalho, 2004; Oliveira, 2004). At the cultural level, even if African immigrants register relatively low levels of contrast with the host population (Machado, 2002: 33-62), their presence introduces greater variability into Portuguese society in linguistic and religious terms and in the everyday life forms of the production and consumption of culture.

At the legal and political level, access to Portuguese citizenship, especially by immigrants' descendants, has become a pressing problem. This has led to the recent amendment of the citizenship law, which makes such access less difficult. Furthermore, an extension of the right to vote is beginning to be discussed. At present, it is highly restricted as immigrants can only vote at the local level and, then, only if their home countries grant resident Portuguese citizens the same rights.

Table 7.2 Socio-occupational trajectories of Cape Verdeans in Portugal (%)

	One year after arrival	Mid-way point of stay	2004
Work situation			
Employee with a contract	38.9 (51.6)	59.2 (66.0)	41.4 (61.3)
Employee with precarious conditions (no contract)	28.5 (37.8)	18.2 (20.2)	14.2 (21.1)
Part-time employee	6.6 (8.8)	6.2 (6.9)	4.1 (6.0)
Self-employed	1.0 (1.4)	2.7 (3.1)	4.1 (6.0)
Employer	0.3 (0.5)	3.4 (3.8)	3.7 (5.5)
Unemployed	—	1.0	7.1
Housewife	10.1	6.5	8.8
Student	13.2	0.3	—
Retired	0.3	1.7	12.2
Sick	0.3	0.7	4.1
Other situations	0.7	—	0.3
Total	100.0 (n=288)	100.0 (n=292)	100.0 (n=295)
Branches of activity			
Agriculture and fisheries	0.5	1.1	1.5
Manufacturing industry	2.8	2.7	2.0
Construction	41.0	33.2	32.2
Trade, catering, hotel business, services	23.0	34.4	37.2
Public administration, health, education	6.0	11.8	12.1
Domestic service	26.7	16.8	15.1
Total	100.0 (n=217)	100.0 (n=262)	100.0 (n=199)
Occupational categories			
Senior managers, intellectual and scientific professions, intermediate professions	2.3	7.6	12.6
Administrative personnel	1.4	3.4	3.5
Sales and service personnel	12.9	20.6	19.1
Cleaning companies workers	8.8	12.2	15.1
Domestic workers	25.8	16.8	14.6
Agricultural workers and fishermen	1.4	1.1	0.5
Factory workers	7.4	8.0	3.0
Construction workers	40.1	30.2	31.7
Total	100.0 (n=217)	100.0 (n=262)	100.0 (n=199)

Note: N=300 (the percentages in brackets in the first part of the table were calculated solely for the total workforce with an occupation).

Source: *Limits Project*, CIES-ISCTE, 2004.

Another perspective of the consequences of the sedentarisation of African immigrants can be gained by observing their trajectories in Portuguese society, given that over two decades have passed since the migratory flow began to take on substantial proportions. In studying these trajectories we can find answers to a fundamental question: has sedentarisation brought social integration? This is a basic question for the immigrants themselves, who carry this expectation in their migration project and for Portuguese society as a whole, for the way that it absorbs the new population contingents that immigration brings.

The social integration of an immigrant population takes place on a number of dimensions — all those mentioned above: demographic, economic, cultural and political. When labour migration is concerned, an especially important dimension is the immigrants' socio-occupational trajectories.

It is a known fact that, generally speaking, African immigrants occupy unskilled and precarious positions on the labour market, with the exception of small economic and professional elites. Is this unfavourable location retained as their length of stay gets longer or do they manage to improve their situation, circulating in other areas of activity and other occupational categories?

The issue of socio-occupational trajectories is also decisive for the children of immigrants. We can formulate it in the following way: in the transition to adult life, is upward social mobility achievable by the young sons and daughters of immigrants? What is these young people's educational and occupational profile in comparison to that of their mothers and fathers?

To reply to these two sets of questions, we relied on data collected in two empirical research projects mentioned above, the Limits and Jodia projects, which were carried out in CIES between 2003 and 2006.

Using a questionnaire survey, the Limits project very carefully reconstituted the occupational, family and residential trajectories of 300 Cape Verdean immigrants (as well as 300 Hindu immigrants), aged 35 or more, who had lived in Portugal for at least 15 years, from the point of arrival in the country to the survey in 2004. On the basis of another questionnaire survey carried out in 2004, the Jodia project described the social situation of 1,000 children of African immigrants aged 15-29. This survey covered a very broad set of aspects, including the educational and occupational profiles and trajectories of these young people and their families.

In table 7.2 we can see how the socio-occupational trajectories of the Cape Verde immigrants surveyed in the Limits project had developed at three points in their life in Portugal — one year after arrival, the mid-way point and the year 2004, when the survey was carried out — with reference to three basic indicators that characterise these trajectories — their work situation, sector of activity and occupational category.⁷

Beginning with the work situation, we can see that, for those who have an occupation, the most common feature for the whole of their time in Portugal is that they are employees. One year after arrival, 98% of the Cape Verdeans who had an occupation were employees; and in 2004 the figure was 88%.

7 For a detailed analysis of the socio-occupational trajectories of Cape Verdean immigrants, including the pre-migration phase and a systematic comparison with the other group surveyed in the Limits project, the Hindu immigrants see Machado and Abranches (2005). Some of the data and conclusions presented in that work are picked up here.

Even so, this does not diminish the significance of the 12% of respondents who were employers or self-employed in 2004 (only 2% were so initially). It reveals a degree of permeability in class boundaries, though this particular case essentially involves trajectories within the construction sector.

If the condition of employee is the enduring experience, there is an important change in the situation in which it operates. Between the start and mid-way point of their stay in Portugal, the percentage of workers without a contract almost halves, with no alteration occurring after that point. Although, in this respect, it is not possible to talk of upward social mobility, there is still a movement from the most unstable to more stable segments of the labour market, which is reflected in an improvement in social status.

The other side of the coin is that, many years after arrival (it may be recalled that the respondents have been residents for at least 15 years), 20% of the immigrants who work still do so under precarious employment conditions. The fact that this percentage stabilised between the mid-way point of their stay and the moment of the survey may be interpreted as an indicator of the structural inertia, at this level, of the labour market segments in which Cape Verdean men are concentrated, in particular construction. This is a clear case in which the socio-occupational dimension puts serious restrictions on social integration.

The same may be said for the unemployed. If unemployment was non-existent or minimal at the two previous moments of Cape Verdean immigrants collective trajectory, in 2004 it affected 7% of respondents. As can be seen, the situation of high unemployment that Portugal has experienced in recent years directly affects a significant part of this population.

With regard to those outside the workforce, there have been fundamental changes. There are no longer any students, the percentage of housewives has fallen and the retired and those unable to work for health reasons now represent a significant figure.

The case of the students is easy to explain. They are the ones who arrived in their childhood or youth, were still being educated during their first years in Portugal and, in the meantime, have joined the workforce. It may be recalled that only respondents aged 35 and over are analysed here, and not their children, among whom the number in school/further education is obviously high.

With regard to housewives, the progressive reduction in their relative weight is to be expected in a situation of labour migration. In fact, for many women who, before migration, did not work outside the home, the change brought about by immigration is also a change in their work situation: this means that they move from the economically inactive to economically active group. The fact that the percentage of housewives increased between the mid-way point and 2004 does not necessarily indicate an exception to this rule, but more probably reflects hidden unemployment.

Finally, the appearance of a considerable number of retired people demonstrates that we are dealing with a population that has lived here long enough for some of its members to have completed the cycle of a working life. The same interpretation is possible for those declared incapable of work for health reasons, in whom the effects of relatively advanced age and the physical deterioration caused by the long-term exercise of arduous occupations are combined.

The future of immigration in Portugal in the short and medium term will be marked by the formation of a new category of generally poor pensioners, which will create new problems as far as the social integration of immigrants is concerned. This is a reality that can only get larger. One reason is that, as can be seen, there is no automatic connection between retirement and the return of immigrants to their home countries. A second reason is that, due to low salaries and irregular contributory track records, many have or will have meagre pensions. This means that from the income point of view, as a result of the same processes, they will experience similar conditions to those of many of the native elders, who today represent the largest category of poor people (Capucha, 2005: 187-192).

With regard to the branches of activity that Cape Verdean immigrants have entered during their years in Portugal, the most notable aspect is the reduction in their dependence on branches that regularly offer more precarious working conditions.

Though construction and domestic service still absorb important numbers, their share has fallen from 41% to 32% and 27% to 15%, respectively. The change has mainly been in favour of trade and services, with a rise from 23% to 37%, and also the public administration, health and education. An analysis of the branches of activity involved thus confirms what the work situations had already revealed: as the period of residence lengthens a proportion of the immigrants move to more stable segments of the labour market.

It is also confirmed that this movement essentially takes place between the beginning and the mid-point of their stay, while the distribution among branches of activity undergoes little alteration after that point. It may be deduced from this that opportunities for change have, meanwhile, become very limited.

The minimal presence of Cape Verdeans in agriculture and manufacturing signifies different things. If, from the outset, the fact that respondents live in Lisbon excludes a connection with the land, it would be expected that, with the passage of time, there would be greater participation in manufacturing. As other studies have shown (Gomes, 1999; Machado, 2002), the sector has remained closed, overall, to African immigrants, a situation that would justify a separate study, particularly since this is not the case with more recent arrivals such as those from Eastern Europe (Baganha, Marques and Góis, 2004).

Table 7.3 The educational levels of African immigrant parents and their children (%)

	Sons	Fathers	Daughters	Mothers
Cannot read or write	–	3.0	–	6.3
1st basic education cycle /Grades 1-4	0.6	30.5	–	33.0
2nd basic education cycle /Grades 5-6	5.8	28.3	3.8	24.7
3rd basic education cycle / Grades 7-9	33.1	13.9	23.8	15.7
Secondary education / Grades 10-12	43.6	11.4	52.7	10.2
Higher education	16.9	12.9	19.8	10.1
Total	100.0	100.0	100.0	100.0

Source: *Jodia Project*, CIES, 2004, N=1000.

Table 7.4 The occupational categories of African immigrant parents and their children (%)

	Sons	Fathers	Daughters	Mothers
Senior managers	0.5	5.6	–	1.5
Intellectual and scientific professions	2.0	6.4	3.6	6.9
Intermediate professions	8.1	3.1	4.1	2.0
Administrative personnel	10.1	2.7	23.6	7.6
Sales and service personnel	14.5	3.8	55.6	25.6
Unskilled workers in services	10.6	6.1	10.1	49.0
Industrial and transport workers	12.9	18.3	3.0	5.7
Construction workers	20.7	48.8	–	–
Unskilled construction workers	19.8	1.3	–	–
Other occupations	0.8	3.9	–	1.8
Total	100.0	100.0	100.0	100.0

Source: *Jodia Project*, CIES, 2004, N=1000.

In relation to the final indicator in table 7.2, the occupational categories of immigrants, it can be seen that between the beginning and mid-point of their stay the proportion of construction workers fell from 40% to 30%, as the analysis by branch of activity has already indicated. Between the mid-point and 2004, this percentage rose again, though very slightly. At the end of many years' residence, therefore, not only is this occupational group still the most important, quantitatively, among Cape Verdeans but, as mentioned above, the opportunities to move to other labour market segments also seem to have been exhausted.

Another important change has been the gradual fall in the percentage of domestic workers, in parallel with the gradual rise in the number of cleaning companies' workers. This is a flow involving essentially the same people. Though this does not represent an example of full upward social mobility, it

still has a social significance in that it allows access to formalised and, therefore, more advantageous working situations. The same may be said of the rise in the number of immigrants in the sales and service personnel category, which, to a certain extent, also involved ex-domestic workers.

Finally, we should note the increase in senior managers, intellectual and scientific professionals and intermediate professionals to 13% in 2004. They are almost all people who have attained high educational levels in Portugal, though at the beginning they worked temporarily in occupations requiring few skills.

In summary, it can be said that, though this small minority with a medium and high social status exists, the dominant occupational profile among Cape Verdeans corresponds to one of the modes of incorporation into host societies identified by Alejandro Portes — that of entering into the “secondary labour market”, where the work is precarious, unskilled and badly paid. The prevalence of this profile at the end of a long period of residence also confirms the feeble opportunities for social mobility that the same author says are associated with this mode of incorporation (Portes, 1999).

It is true that, over the years, there have been a reasonable number of immigrants who have freed themselves from utterly precarious situations offering no work contract and found others that are more formalised and stable. But these movements have not taken them out of the secondary labour market to which Portes refers. They have merely been movements from the fringe of this market to its more central areas.

And what can we say about the children of African immigrants? What do we know about their socio-occupational trajectories and the forms of their transition to adulthood? Tables 7.3 and 7.4 give empirical information gathered by the Jodia project on some crucial aspects of these trajectories, from an intergenerational standpoint.

Table 7.3 offers a comparison of the educational levels attained by the children of immigrants and the levels of their parents. Table 7.4 compares the occupational profiles of the two generations.

The first observation to be made about the parents and children’s profiles is that the latter have much more schooling than the former. Besides the existence of parents who cannot read and write, a situation that does not occur among the youngsters, it can be seen that 60% of parents did not study beyond Grade 5 or 6. With regard to the children, as many were still studying at the time of the survey, they can be expected to acquire more educational resources than the survey captured: the modal educational level recorded is equal to Grades 10-12, followed by Grades 7-9. The children’s generation also more often goes on to higher education.

It is clear that the differences in educational capital between the two generations may, to a certain degree, be relativised. The children of immigrants face a societal context — present and virtual — that demands more in

education and knowledge than the context faced by their parents when they were young. Therefore, from the point of view of integration into Portuguese society, the comparative advantages arising from more schooling may be smaller than they look like.

To help us understand how far this is so, or not, we can use another means of comparison. How do children of immigrants compare with Portuguese youth in general? Are their educational levels similar or different?

For the reasons presented in a previous paper, which have to do with the difference in the age structure of the two categories (children of immigrants and young people in general), this comparison can only be made for the same age group (Machado, Matias, and Leal, 2005).

The conclusions to be drawn are that in the 15-19 and 20-24 age groups the comparative distributions of educational levels are not much different. The most frequent case for both the young people of African origin and the youth in general is that they have reached secondary education. Indigenous youngsters reach more frequently higher education, but they also outnumber children of immigrants in the lowest education levels. In the 25-29 age group the distribution changes. It can be seen that the young people of African origin seem to have the advantage, more frequently reaching higher education, Grades 10-12 and even Grades 7-9, since a significant percentage of the non-immigrant youth (33%) did not go beyond the 2nd basic cycle (i.e. beyond Grade 6). In a comparison between the sexes, the situation is also similar, with the children of immigrants following the general pattern, according to which the girls have more schooling than the boys.

In summary, there is a double convergence between the young people of African origin and the young Portuguese population in general. Both groups have more schooling than their mothers and fathers and have educational levels that do not show significant variations between them. This is not because children of immigrants have high levels of education but rather because the young Portuguese in general have low ones. Though some of the distance has been reduced in the last two decades, the Portuguese education deficit, leaving the country far behind European Union average (Costa *et al.*, 2000; Mauritti, Martins, and Costa, 2004), is being extended to the younger generation.

The routes of social promotion that the education acquired offers one and the other group are, therefore, basically the same, with the usual mechanisms of class inequality making themselves felt in the matter, that is, the differences in social origin and educational capital.

For the young people who go to university, the prospects are more favourable; for those who finish with a basic or secondary education (up to Grade 9 or Grade 12) they are less so. The fact is, however, that attainment of one or the other levels depends to a great extent on class origins (Machado *et al.*, 2003). For the same class situation, the educational results of the children

of immigrants are similar to those obtained by the native youth. This is the conclusion of another study that made this comparison in a local context (Justino *et al.*, 1999).

With regard to occupational profiles, there are notable differences among both the males and females when we compare the two generations (table 7.4).

The modal categories for the fathers and mothers, which account for almost half of them, are “construction workers” and “unskilled workers in services”, respectively. This is consistent with what the Limits project data has already shown. With regard to the youth, the most frequent categories are different, though the variations are more obvious for the girls, when compared with their mothers, than the boys, when compared with their fathers.

Thus, whereas most girls fall into the service and sales personnel category (56%), positioning themselves at an appreciable distance from their mothers’ less skilled occupational status, the boys often work in construction (41%), a situation that leaves them not a great distance ahead of their fathers. Comparatively speaking, the boys are in some ways even worse off than their fathers, since the latter are concentrated in more skilled occupations in construction, whereas the young ones are equally distributed between skilled and unskilled occupations.

It is important not to forget, however, that the young people have had short working careers. Many are gaining their first work experience, which, in construction and other sectors, generally means beginning with the least differentiated tasks. This is confirmed when, among the young people who have longer experience of the labour market, we compare their first occupation and that at the time of the survey. The data shows that the relative weight of unskilled construction workers falls from 55% to 20%.

The difference between the young males and their fathers is more visible in the numbers that have tertiary routine occupations. Young males are employed more often than their fathers in the service and sales personnel category and administrative staff category (15% as against 4% and 10% as against 3%, respectively). On the female side, the generational difference in the administrative staff category is even greater (24% as against 8%).

If we move up the hierarchy of occupational categories, we also see that the young ones more regularly have intermediate occupations than their parents, though the distribution is inverted when we arrive at the top two categories, senior managers and intellectual/scientific professionals. These demand a period of labour market experience that the youngsters still do not have.

In an overall assessment of the occupational profiles of African immigrants and their children, three points need to be stressed.

The first is that, in contrast to the proletarianisation characteristic of the parents’ generation, whether as construction or unskilled service workers, it

is possible to talk of the “tertiarisation” of the children’s generation, with its associated advantages of greater formalisation and stability regarding work. If it is true that a sizeable number of these youngsters start their working life in the construction or unskilled service areas, only a minority of them — more male than female — seem to see themselves confined to these positions. The occupational stereotype of African immigrants, with the men as construction workers and the women as cleaners, in no way represents their children.

The second point is that the girls seem to be in a more favourable position than the boys, partly because they have greater educational capital. To begin with, there are fewer of them in the least skilled occupations. Whereas 31% of the boys are in this kind of occupation, with two-thirds of that number in construction, the equivalent statistic for the girls, corresponding to unskilled work in services, is 10%. And there are more of them in the service/sales personnel and administrative staff categories, which are less precarious and — particularly the latter — demand some skills. In the top categories, the values for the two genders are similar, with a slight advantage for the males.

The third point is that there seems to be a discrepancy between education and occupational status. Given these young people’s educational levels, their occupational composition might be expected to be higher on the scale. But things are not quite as they seem. On the one hand, the educational levels presented above are those of all the young people, those who are still studying and those who already work. If we isolated the latter group, we would see the average educational level fall a little. On the other hand, and more importantly, educational capital is not immediately converted into occupational status, an experience that is shared by the young people in general, including the children of immigrants. In many cases, the first occupational activity does not correspond to the education acquired, nor is it the activity that will be carried out in the future.

Conclusion

Do the sedentarisation of immigrants and their descendants bring social integration with it? This question has already been asked above and, in the light of the empirical elements presented, we can now draw up a reply.

In the case of immigrants, as far as the socio-occupational dimension is concerned, we can speak of limited integration. As has been seen, the only data available is for Cape Verde immigrants, but their experience can be transferred, to a great extent, to other African populations. After many years of residence, the situation of these immigrants has improved, since the rate of precarious labour has fallen substantially, but the great majority of them are still confined to the least skilled segments of the labour market.

This also means that many are poor, as their income lies below the lines used to define poverty. In Portugal, however, poverty is far from being restricted

to populations of labour immigrants. When we consider the large universe of people living in poverty, we see that immigrants are a minority in this universe too. What is confirmed, and this is a different matter, is that the incidence of poverty is higher among immigrants than in the population in general, which, given their limited opportunities to alter their social trajectories in the future, makes them more vulnerable to the processes of social exclusion. Ageing with the risk of social exclusion is a possible scenario facing many of them.

With regard to the children of immigrants, their educational and occupational profiles clearly distinguish them from their mothers and fathers and provide them with other opportunities. Although more empirical research and further exploration of the data available are necessary, what has been presented here strongly suggests that their social contrasts, when compared with native youth, are considerably smaller than those of their parents, when compared with the Portuguese population as a whole.

This is not to say that there is not double-face processes involved as far as their integration is concerned. Children of immigrants who went to university and those who left school with basic education or less, have very different prospects of integration. But, in Portuguese society, this double standard also applies to the youth in general.

Clearly, the integration of immigrants and their children does not begin and end in the socio-occupational field. A fuller knowledge of whether sedentarisation brings integration implies knowing other kinds of processes, in particular those that involve their symbolic belonging to the host society. The persistence of social representations that exclude them from this belonging — even the Portuguese-born children and youngsters, who now have greater access to Portuguese nationality — may generate phenomena of reactive ethnicity and a kind of sedentarisation without national identification.

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Immigration and education **Trajectories, daily life and aspirations**

Teresa Seabra and Sandra Mateus

It can be stated today that Portugal is progressively becoming a country in which ethnic diversity and cultural heterogeneity cut across the different social domains of people's existence, including that of the educational system. The extent of this phenomenon, which is mainly limited to large urban areas, is considerable and its growth dynamics are strong.¹

Immigration has intensified in the last decade, during which populations from Eastern Europe (Ukraine, Moldavia, Romania and Russia) and South America (mainly Brazil) have joined those from former African colonies (Cape Verde, Angola, Guinea-Bissau, São Tomé and Príncipe, and Mozambique). The greatest concentrations are in the Lisbon area (45%), with Faro (11%) and Setubal (9%) following, while in 2006 the largest populations, in order of size, were those from Cape Verde, Brazil, Ukraine and Angola.²

The integration of the school population resulting from the dynamics of migration, whether from the perspective of macro-structure or its more local and everyday importance, is a topic that is increasingly visible at a national and European social, scientific and political level. This is illustrated by the rise in sociological production in this field and the recent publication of two comparative European studies (Eurydice, 2004a; EUMC, 2004a), revealing different levels of immigrant populations and different degrees of their recognition and integration in member-state educational systems. It is also seen in the inclusion of chapters on the presence of foreign pupils in education

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- 1 Data from the SEF (Borders and Foreigners Service) indicates that there were 409,185 foreigners in Portugal in 2006 (a number that includes residence permits and visas). If the roughly 60,000 people involved in specific legalization cases are also counted, the percentage of immigrants in the country may amount to around 5%.
 - 2 According to the same source, in 2006 75,485 Cape Verdeans, 65,463 Brazilians, 37,851 Ukrainians and 33,215 Angolans (http://www.sef.pt/documentos/59/Populacao_%20EstrangeirosTN06.pdf).

systems in documents that comprehensively analyse the educational situation in Europe (OECD, 2004). We are dealing with a production conditioned by such problems as the lack of national statistical information and the heterogeneity of the periods of the immigration experience, of policy implementation and of the recognition of immigrant categories, among others that affect each country in particular. Nevertheless, the studies and documents produced allow us to get closer to the educational conditions, careers and experiences of immigrant children. The following text provides a summary of some of the existing information on this topic and that produced by the team.³

Integration policies in the Portuguese educational system for immigrant children

From the structural point of view, in the European context, the conditions for the integration of pupils of non-national origin have been observed on the basis of the national performance in a set of dimensions. Among others, these include the specificities of the right to an education and the acquisition of the language, the system of equivalence and the guidance and support measures, or the way that the intercultural factor is included in the curriculum. The studies carried out report a progressive convergence in European policy in this field, in particular in guaranteeing immigrant populations and their children basic educational rights and recognising the need for specific support measures. A review of the Portuguese position in the dimensions mentioned, however, indicates the recent nature of most of the existing measures, the discrepancy between legal and practical arrangements and the gaps in the information available.

As in most of Europe, the right to education in Portugal applies to all pupils, which, in formal terms, means that no school may refuse a pupil, irrespective of his or her origin or immigration/residence status. The same principle applies for access to school services and financial support (Eurydice, 2004a).⁴

With regard to language, according to data published by Eurydice in 2004, the proportion of pupils whose first language was not the language of instruction was 1.5% in 2002, or roughly half of that relating to pupils whose parents were born abroad (3.2%). A study carried out in this area, in state education, by the Ministry of Education Department of Basic Education (i.e. Grades 1-9) in 2001/02 reported that there were around 17,535 pupils whose mother tongue was not Portuguese. Around 8,076 spoke Creole as their

3 The authors would like to thank Fernando Luís Machado for his most helpful contributions at the time of the final revision of the text.

4 However, countries such as Denmark, Poland and Sweden subject the admission of pupils of foreign origin to the presentation of proof of their residential status (Eurydice, 2004a).

mother tongue (without any further specification), followed by Romany (1,338 pupils) and French (837). About 70% of the pupils whose first language is not Portuguese live in the Lisbon region (DEB, 2003).

From the point of view of legislation, since 2001 Portugal has legally recognised the teaching of Portuguese as a second language. Article 18 of Decree-Law No. 6/ME/2001 of 18 January states that “for pupils whose mother tongue is not Portuguese, schools should offer specific curricular activities for them to learn it as a second language”.⁵ The law also provides for the development of individual curricular support on the basis of a diagnostic analysis and an individual educational support plan.⁶ With regard to the rules on the independence of schools, provision is also made for a reduction in teaching time for teachers who specifically help immigrant pupils to learn Portuguese.⁷ In practice, little is known about how far the legal provisions available are actually applied. However, the DEB (2003) study mentioned above also surveyed the kind of support that exists in the field of Portuguese. Grouping together increased pedagogical support and specific help with Portuguese, it concluded that such support is to be found above all in the northern region. This area contains just 10% of all the basic-education pupils nationally identified as having a mother tongue that is not Portuguese, i.e. as needing the support mentioned. This shows that there is something lacking at this level.

In 2006, a new regulation (“*Despacho Normativo*” no. 7, of 6 February) established the “principles and guidelines for the implementation, monitoring and evaluation of the specific curricular and extracurricular activities to be developed by the schools and groups of schools in teaching Portuguese as a foreign language” (article 1). Three language proficiency levels are defined (beginners, intermediate and advanced) and pupils should be placed in the appropriate level following a diagnostic test. The beginner and intermediate level pupils should receive 90 minutes a week of compulsory support activities of Portuguese as a foreign language. The advanced level pupils are considered able to follow the national curriculum.

Another indicator of integration consists of the equivalence system established for pupils of foreign origin. This involves a set of criteria to be applied uniformly in the educational system to determine the level at which a pupil should be admitted.⁸ In Portugal, integration takes place in class groups (groups of the pupil’s age or below), in regular education, on the basis of the

5 Decree-Law No. 6/ME/2001 approves the curricular reorganisation of basic education (i.e. grades 1-9).

6 Decree-Law No. 219/97 of 20 August (which governs equivalence and the recognition of foreign qualifications below the higher educational level).

7 The rules on the independence of schools are set out in Decree-Law No. 115-A/98 of 4 May.

8 Set out in Decree-Law 219/97 of 20 August (which governs equivalence and the recognition of foreign qualifications below the higher educational level).

“submersion model”, in which the pupils are exposed directly to the host-country language. There is no information on the existence of bilingual teaching involving either the pupils’ language of origin or other subject matter. This equivalence system of foreign basic and secondary education qualifications (Decree-Law no. 219/97) was revoked in 2005 (Decree-Law no. 227 of 28 December) so as to revise, simplify and decentralize administrative procedure and transferred “a substantial part of the powers to grant the equivalence of foreign qualifications to the educational establishments...”

The guidance and support measures take specific forms — linguistic and pedagogical support, as mentioned above, information for families and a cultural liaison service. The last two have recently started to be developed in Portugal: the production of information brochures on the educational system (an initiative of ACIME, the Committee for Immigration and Ethnic Minorities, with material in English and Russian) and the integration of socio-cultural liaison officers who facilitate coordination between the family, school and community. This is essentially carried out, however, on the initiative of certain schools in the Lisbon area and tends to be sporadic and discontinuous.⁹

From the curricular point of view, the intercultural approach is carried out transversely. Especially in basic schooling, it focuses on promoting tolerance and respecting differences, particularly through extra-curricular intercultural activities such as thematic events and festivals and student exchange (Eurydice, 2004b). In teacher training, intercultural studies are based on a set of separate initiatives carried out by trade unions and associations or within the scope of the specialised postgraduate courses available. Some teacher training institutions are beginning to include the subject area in their curriculum, though there is no explicit policy guidance on this matter.

Finally, this snapshot of the structural conditions affecting the integration of immigrant children in the educational system could mention, in particular, the creation in 1991 of the *Entreculturas* Secretariat (at present part of ACIDI), a body under the aegis of the Ministry of Education. Its activity has extended from the production of statistical information on the presence and school results of pupils belonging to ethnically different minorities to teacher training and the production of materials promoting the integration of diversity in schools.

9 There are other measures that, though not applied in Portugal, are put into practice in other European countries, e.g., specific meetings for immigrant families, the provision of interpreters and the supply of information on pre-school systems (Eurydice, 2004a).

The presence of the children of immigrants in school: configurations throughout the country and their distribution

The report *Integrating Immigrant Children into Schools in Europe* (Eurydice, 2004a), based on the PISA 2000 survey,¹⁰ mentions that 3.2% of the fifteen-year-olds in the Portuguese educational system have parents who were both born abroad. This figure is of little significance when compared with countries such as Luxembourg (34.2%) or France (12%), though it is higher than those for Spain (2.0%) or Italy (0.9%). According to the same report, 12% of the pupils surveyed attend schools where the percentage of immigrant children lies between 10% and 40% and only a very small number (0.1%) attend schools in which the level of concentration reaches 40% or more. This contrasts strongly with European countries such as Luxembourg and Latvia, where the percentage is around 30%.

As mentioned above, Portuguese data on the presence of immigrant children in the regular education services of non-tertiary state schools (Grades 1-12) is produced by *Entreculturas* (between 1994/95 and 1997/98) and by the Bureau for Information and Evaluation of the Educational System (GIAE) (between 1999/00 and 2003/04).¹¹ As can be seen from table 8.1, the proportion of students descending from immigrants over the decade under analysis (about 9,000 more students than at the beginning), represents almost 5% of the school population of basic and secondary schooling.

The geographical location of this population reflected a highly uneven distribution throughout the country, being almost exclusively concentrated in the Lisbon Metropolitan Area: in 2003/04, 68% of all the pupils who were the children of immigrants lived in this area.

Regarding countries of origin, the families of most pupils come from the former Portuguese colonies of Angola and Cape Verde, representing 20% and 17% respectively of the total number of students descending from immigrants, followed by those whose families are from countries in the European Union (15%) and Brazil (13%).¹²

10 The PISA (Programme for International Student Assessment) survey was used in this report as it is the source that best guarantees comparability, since it standardises the notation criteria and instruments applied in the countries covered. In Portugal, it was carried out between April and May 2000, in 149 schools, taking in a total of 4,604 pupils attending Grades 5-11 at school (in ME, 2001, *Resultados do Estudo Internacional PISA 2000. Primeiro Relatório Nacional*, December 2001, ME/GAVE).

11 This study selected data relating exclusively to pupils associated with immigration. For this reason, the children of ex-emigrants or the ethnic Romany pupils also included in *Entreculturas* statistics are not taken into account.

12 The figures for origins have remained stable during the decade under analysis, with the exception of Brazil whose expansion has been increasing since the beginning of this century.

Table 8.1 Immigrant children and the total number of children registered in basic and secondary education, by school year

School year		94/95a)	95/96a)	96/97a)	97/98a)	99/00a)	00/01b)	01/02b)	02/03b)	03/04b)
Total	n°	53,120	59,252	58,913	60,975	50,675	55,223	60,654	64,779	62,491
	%	3.7	4.2	4.3	4.6	4.0	4.0	4.5	4.9	4.8
All school		1,424,290	1,409,751	1,369,326	1,339,441	1,265,870	1,382,366	1,338,041	1,310,650	1,301,095

Note: a) public education only; b) public and private education.

Source: Entreculturas/Ministry of Education and Entreculturas/ACIME database, at http://w3.gepe.min-edu.pt/EstatisticasAnuais/estat/99_00/pdf/A.1.2.1_A.1.2.10.pdf (July 8, 2008) (for 1992/2000 data); GIASE/ME (2006) (for remaining data).

Certain higher education data for the school year 2000/01 (OECD, 2004) can be added to the picture provided above, showing that 2.5% of the students enrolled in Portugal originate from abroad, in the following configuration: EU15 — 18%; rest of Europe — 1%; Africa — 56%; North and South America — 19%; Asia and Oceania — 1%; unspecified — 5%. The five foreign countries with the greatest representation were, in the same year, Angola (3,168 students), Cape Verde (2,486 students), Brazil (1,510 students), France (1,309 students) and Mozambique (1,070 students).¹³

School careers and results

In spite of the measures drafted and established in the whole European area to support the educational processes of heterogeneous populations, international studies point to the increased disadvantage of immigrant populations in terms of academic results, though variables relating to families' socio-economic status are not taken into account (EUMC, 2004a). Among such heterogeneous populations, the most unfavourable results belong to non-European migrants and non-immigrant minorities, who register higher rates of failure and early school-leaving and attend less demanding vocational options and special education. In general, the children of less recent migrations are more successful than those of the more recent ones. There are, however, differences in success between immigrant populations: at certain educational levels, some of them compare positively with the non-migrant population.

13 The percentages relating to origin correspond to the students enrolled at ISCED level 5 (undergraduate studies) and 6 (master's, PhD and post-doctoral studies). The reference for calculating the total percentage (2.5%) is the total number of students enrolled (384,322) in undergraduate, postgraduate and master's courses in state and private education in the same year, excluding those at PhD level, on the basis of the following source: OCES/MCES (2004), *O Sistema do Ensino Superior em Portugal 1993-2003*, available at <http://www.oces.mctes.pt/docs/ficheiros/SistemaESPTSet04.pdf>.

In Portugal, the information available is restricted to non-tertiary levels and derives, in particular, from the statistical information provided by *Entreculturas* and the data in certain master's dissertations and PhD theses produced in the meantime.

The few studies that exist are sectoral and target certain immigrant sub-populations. Accordingly, at the level of information integration and convergence, little is known about these young people's educational processes and school careers, their distribution among the different educational options or the conditions of their transition to and integration into the labour market.

On the one hand, we know the importance of the class situation of immigrant families to the educational strategies they follow (Seabra, 1999) and to the socialisation processes of children with African roots (Santos, 2004). On the other hand, we know the tensions that arise from a relationship of cultural and social domination and the reaction to difference by the host society — tensions that run through these children's identity building processes (Gusmão, 2004).

With specific regard to the experience of schooling, we know about the increased difficulties that school brings to pupils who are the children of immigrants. These pupils' failure tends to be ascribed to causes outside the school, thus generating institutional inertia and negative expectations on the part of the teachers, which affect their pedagogical relationship with the schoolchildren (Paes, 1993; Angeja, 2000). There are negative representations of the children of African origin among the teachers of the first basic education cycle (Grades 1-4) (Cardoso, 1996). We know, in addition, that schools can play an important role in strengthening the ethnicisation of social exclusion (Sousa, 2000).

The research carried out has especially covered schoolchildren from Portuguese-speaking African countries (as a whole or by country of origin), with those of Indian origin only more recently being included. The good school performance of the latter, which contrasts with that of pupils of African origin, has engendered comparative analyses of the processes of social and educational integration or exclusion among young people with a Cape Verde and Indian background. The conclusions of these studies indicate the importance of the ethnic factor which, in association with social and racial status, seems advantageous for the Indians and disadvantageous for the Cape Verdeans. They also point to different patterns regarding upbringing, social networks, migratory experience and the families' social and human capital and, also, to the structural (economic, political and social) circumstances in the host society in which they are inserted (Pires, 2000). The consistent educational success of schoolchildren with Indian roots (which is always above that of pupils of Cape Verde origin, even where social class and the parents' education are constant) does not seem to be associated with the greater use or mastery of spoken or written Portuguese (Seabra and Mateus, 2004).

Table 8.2 Graduation rates per school cycle and national origin (2000/01 to 2003/04) (regular school in Mainland Portugal)

	1st cycle (Grade 4)				2nd cycle (Grade 6)				3rd cycle (Grade 9)			
	00/01	01/02	02/03	03/04	00/01	01/02	02/03	03/04	00/01	01/02	02/03	03/04
Total	90.2	90.4	92.0	92.8	87.6	84.2	85.8	86.6	84.6	83.6	85.4	87.5
Non-Imi.	90.9	91.2	93.1	94.0	88.1	84.6	86.4	87.1	85.0	84.1	85.9	88.0
Total Imi.	77.0	77.7	75.6	75.6	74.2	74.5	73.8	74.9	72.1	72.7	72.1	75.1
Angola	80.6	80.8	78.4	78.5	76.1	75.0	77.8	75.5	72.9	73.1	74.1	72.4
C.Verde	76.5	76.4	74.6	76.2	67.4	69.7	68.3	73.7	73.4	73.7	74.2	76.0
S. Tomé	78.9	76.7	81.7	73.1	72.3	63.0	72.6	74.4	73.5	77.5	71.4	72.7
Guinea	76.4	76.6	76.2	75.5	78.7	75.0	74.6	71.5	64.2	72.6	67.9	74.9
Mozambique	77.4	78.0	73.4	62.9	74.4	79.7	77.0	73.3	76.5	68.4	67.2	75.0
India P.	75.3	85.4	86.8	81.8	71.4**	77.3*	76.9*	73.5*	72.7*	72.1*	72.7*	75.6*
Brazil	71.1	74.2	72.0	73.5	67.0	68.4	68.4	69.9	67.3	65.9	70.5	70.2
E.U.	75.0	75.7	73.5	75.0	80.3	82.6	79.3	80.5	74.5	76.3	71.1	80.3

Caption: * no. d; ** no.

Note: estimated values on the basis of the sources identifying the number of pupils registered in the school year and the number of pupils that achieved the certificate of degree of the respective cycle.

Source: GIASE/ME (2006).

The statistical data available in Portugal enables the evaluation of the school results of the immigrant pupils by means of graduation rates in each school cycle (table 8.2).¹⁴ It can be seen that over the four school years under analysis, the average school performance of the immigrant pupils is lower in basic school than that of the non-immigrant pupils. There were some oscillations over this period in the various school cycles: in the 1st school cycle, the results of immigrant pupils deteriorated and those of the non-immigrants improved; therefore, the distance between these two groups increased by about 4%. The results remained stable in the 2nd cycle and there was a slight reduction in the distance between the groups (less than about 2%). There were no significant changes over the period in the 3rd cycle.

From the point of view of internal differentiation of the immigrant population, a diversity of situations should be noted between the countries of origin. The less satisfactory results correspond in most cases to pupils of Brazilian origin. In contrast, pupils originating from the European Union countries, India/Pakistan and Angola are found at the other extreme. In some national origins, a consistent variation can also be seen between the different study cycles: in the case of pupils of Angolan origin, school success declines as they advance through school; Cape Verdian students are the worst performers in

14 The rate corresponds to the number of pupils who passed in the final year of each cycle in relation to the number who were evaluated in the same school year (Grades 4, 6, 9 and 12). For the years following 1997/98, *Entreculturas* also estimated the pass rates based on what had been observed in the period prior to this school year, as it did not have the information required for the actual calculation. It was decided not to use this data.

the 2nd school cycle; the pupils of Indian and Brazilian origin have the best results at the end of the 1st cycle, while the pupils originating from European Union countries have their worst performance in this cycle.

Unfortunately, these distinct profiles of success cannot be analysed taking into account the variables relating to the social conditions of these pupils' families, though as all the studies show, they are strongly affected by these conditions. In a recent article that made a systematic and multidimensional analysis of the results of a survey on 1,000 African youths of immigrant descent, it was concluded that their school results are not significantly different from the pathways of youths in general and that it is social inequality factors that clearly distinguish these results (Machado, Matias and Leal, 2005).

A rigorous consideration of these pupils' relationship with education will therefore have to leave behind deterministic, a priori and poorly substantiated visions and hasty attributions to fragmentary "prime explanatory items" and assume a multidimensional perspective in which social and cultural factors and subjective trajectories and experience are considered conjointly.

This perspective is applied in the design, and confirmed in the results, of a recent survey of pupils in the 2nd basic education cycle (Grades 5 and 6) in areas where there is a high density of immigrant children (the municipalities of Lisbon and Loures) — the IALL survey.¹⁵ It covered 827 schoolchildren with different social backgrounds and different roots,¹⁶ where 360 were the children of immigrants and, of these, 104 were of Indian and 107 of Cape Verde origin.¹⁷

What stands out, first of all, among the survey group as a whole is the widespread occurrence of educational failure among pupils who are only in the 2nd basic education cycle: a third of them have already had to repeat a year (or more) during their short school careers. We may also note that this happens to a similar degree whether we consider non-immigrant schoolchildren or children of immigrants.¹⁸ In the latter case, the result is only 1% higher (table 8.3).¹⁹

15 The survey was carried out between April and June 2003 under the tri-annual project "The conditions and processes of integration or exclusion among the children of immigrants at school: the case of Cape Verdeans and Indians in Portugal"; it was financed by the FCT (Foundation for Science and Technology) as part of the Sapiens Programme (38835/SOC/2001).

16 These were defined according to the parents' birthplace. Exceptionally, for children of Indian origin, the birthplace of earlier generations was also taken into account.

17 The over-representation of these subgroups of pupils was intentional since they were the target of the study. The same intention influenced the selection of the schools.

18 Since it was not the object of this analysis, the diverse situations among immigrant children was not considered. The group was therefore viewed as a whole, though we are aware of how heterogeneous it in fact is.

19 Without the high incidence of repeating a year among the pupils of Cape Verde origin, the school careers of immigrant children would take on a different appearance: 51% of them had repeated, whereas the rate for Indian children was 26%.

Table 8.3 Non-immigrant and immigrant schoolchildren, according to school trajectory

	Total	Non-immigrant	Immigrant children
Without failing	61.3	61.7	60.7
With failures	38.7	38.3	39.3
Total	100.0	100.0	100.0

Source: Survey of 2nd cycle basic education pupils (Lisbon and Loures) — IALL. (2003)

Table 8.4 Non-immigrant and immigrant schoolchildren, according to gender, social class and parents' educational level

		Total		Non-immigrant		Immigrant children	
		Total (100%)	Without failing	Total (100%)	Without failing	Total (100%)	Without failing
		n.º	%	n.º	%	n.º	%
Sexo	Female	384	65.9	213	66.7	171	64.9
	Male	435	57.2	252	57.5	183	56.8
	Total	819	61.3	465	61.7	354	60.7
Social classe of household*	EEP	86	77.9	49	77.6	37	78.4
	TSMS	103	81.6	67	89.6	36	66.7
	SE	58	62.1	24	66.7	35	57.1
	SE+	47	68.1	27	70.4	20	65.0
	RE	199	62.3	118	60.2	81	65.4
	IW	89	39.3	44	31.8	45	46.7
	E+	184	54.3	106	51.9	78	57.7
	Total	767	62.3	435	62.8	332	61.7
Education level reached by mother	None or 1st cycle	286	49.3	169	47.3	117	52.1
	2nd or 3rd cycles	218	70.2	124	72.6	94	67.0
	High School or Higher Ed	156	81.4	93	81.7	63	81.0
	Total	660	63.8	386	63.7	274	63.9
Education level reached by father	None or 1st cycle	230	44.8	158	39.2	72	56.9
	2nd or 3rd cycles	195	73.3	110	78.2	84	67.9
	High School or Higher Ed	180	76.1	88	84.4	91	67.0
	Total	605	63.3	356	62.9	247	64.4

Note: EEP — Entrepreneurs, Executives and the Professions; TSMS — Technical Specialists and Managerial Staff; SE — Self-employed; SE+ — Self-employed with more than one kind of employment; RE — Routine Employees; IW — Industrial Workers; E+ — Employees with more than one kind of employment.

Source: Survey of 2nd cycle basic education pupils (Lisbon and Loures) — IALL. (2003).

As we mentioned, this research sought to monitor the effect of other variables that have consistently and systematically been seen to affect the dynamics of children's school careers: gender, social class²⁰ and the parents' educational level (table 8.4).

Firstly, the persistent differences between the girls' and the boys' school results are corroborated: in all cases, the boys fail more often, whether or not they are the children of immigrants.

As many studies have also recorded, this data shows in a very meaningful and unambiguous manner how the structure of school-career opportunities is reproduced: children from families with greater resources obtain the best results while a decrease in the different kinds of capital available to the family is accompanied by a systematic reduction in school success. Around 80% of EEP children (i.e. of entrepreneurs, executives and members of the professions) and TSMS children (i.e. of technical specialists and managerial staff) have never failed. For SE and SE+ families (i.e. of the self-employed and the self-employed with more than one type of employment) and RE families (i.e. of routine employees) this figure falls to around 60%. In a far from advantageous situation we find the pupils from industrial workers' families, of whom the majority (60%) have already failed during their short school career. In addition, if we ascertain the alterations that occur with an increase in the parents' educational attainments, we find a significant variation in school success, similar to that already detected in all the research carried out before this: the longer the education, the greater the probability of a successful education.

When we distinguish the non-immigrant children from the children of immigrants this situation does not change, though certain specificities are to be noted when comparing subgroups:

- the immigrant children's school results are better when the family are socially disadvantaged (families of routine employees (RE), industrial workers (IW) or employees with more than one kind of employment (E+)) and when the parents have little education (no schooling or just the 1st cycle);
- inversely, the immigrant children's school results are worse when the parents are technical specialists and managerial staff (TSMS) or self-employed (SE) or when they have attained higher levels of instruction.

In summary, the data indicates that, generally speaking, the children of immigrants do not have specific school trajectories. Moreover, we can advance the hypothesis that in the most adverse situations (membership of the most

20 The definition of class is based on the matrix of the socio-occupational class indicator proposed by António Firmino da Costa (1999).

Table 8.5 Non-immigrant and immigrant schoolchildren, according to type of family, educational support and educational expectations (%)

		Total	Non-immigrant children	Immigrant children
Type of family	Nuclear	68.3	74.5	60.3
	Recomposed	7.9	6.0	10.3
	Single-parent	19.1	14.8	24.7
	Other	4.7	4.7	4.7
	Total	100.0	100.0	100.0
Educational support	Enrolment in pre-school	89.8	92.2	86.7
	Attendance at school meetings	74.7	73.9	75.8
	Dialogue at home about school	89.6	89.7	89.3
	Checking on homework	83.9	85.0	82.5
	Total	100.0	100.0	100.0
Education desired for the children	Up to grade 9	6.4	6.4	6.4
	Up to grade 12	11.4	12.6	9.7
	Up to university	57.3	57.6	56.9
	As far as the child wants	12.1	12.6	11.4
	DK/NR	12.8	10.7	15.6
	Total	100.0	100.0	100.0
The occupation desired by the family demands higher training		41.7	37.9	46.7

Source: survey of 2nd cycle basic education pupils (Lisbon and Loures) — IALL.

disadvantaged social groups) their trajectories are more successful than their non-immigrant counterparts from families with an identical social profile. Could we be seeing an increased investment in education by these families, arising from their strong aspirations towards upward social mobility, which belong to the migrant's situation? Why is it that the advantage of more schooling on the part of the parents or their insertion in social classes with greater resources is not equally beneficial? What can we learn about the relationship of these families with school education?

Although single-parent families or family recomposition are more common among pupils who are the children of immigrants, we have no indication that there is a significant difference in the way families follow a child's education. They check on the completion of homework in the same way. The small differences are in more frequent conversations about school, less help with the homework mentioned and less regular attendance at school meetings (table 8.5). These latter aspects, however, may be highly disadvantageous for immigrant children since, precisely, from the teachers' standpoint, they represent central indicators of family interest.

Educational aspirations, as expressed to the children by their families, do not vary according to the group under analysis — in both cases, most families want their children to obtain a higher education. However, the absence of defined educational plans is more common among immigrant children.

Experience of day-to-day school life

The IALL information indicates that, in their day-to-day school life, immigrant children experience the same problems, tensions and (dis)satisfaction as their non-immigrant counterparts. They do not have greater discipline problems or experience significantly different feelings, even with regard to the discrimination that they feel existing in the school. The specificities detected reveal a certain increase in the value given to relational aspects and a less critical attitude towards the physical conditions and the aspects more directly related to learning. In relation to their non-immigrant schoolmates, immigrant children like their teachers more, yet feel that they receive less consideration and support from them.

With regard to behaviour (the indicators of which are absence or disciplinary proceedings), the most notable feature is the considerable incidence of problems involving indiscipline in the survey population as a whole — 36% of the pupils had already been guilty of misconduct in the school year in progress (seven to nine months of lessons had taken place) and 9% had been subject to disciplinary proceedings (table 8.6).

In a comparison of the subgroups under analysis, immigrant children do not register significant differences. The only point to note is that there is a slightly higher percentage of those whose behaviour was judged as serious misconduct (it led to disciplinary proceedings), though the number of cases was lower, i.e. the rules were broken less often but, in comparison, the cases were considered more serious.

Similarly, there are no great variations between the two groups of students relating to the feelings they experience or the assessments that they make of the school (table 8.7). In both cases, the children feel that discrimination exists in school (on the part of the teachers, the non-teaching staff or their schoolmates) but they very rarely feel *fear* or *shame*. The feeling most commonly experienced is *boredom*.

Among immigrant children minor differences may be noted: they are more likely to conceal their opinion on the possible existence of discrimination at school,²¹ they are less frequently *bored* and they more regularly feel *shame*.

Generally speaking, in the choice of the aspect that (dis)pleases them most at school and what they think should most urgently be changed, we find a fair amount of dissatisfaction with the physical conditions, though to a lesser degree among children from immigrant families, and a certain displeasure with schoolmates, which was particularly indicated by immigrant children. What stands out, in fact, is the particular importance that these

21 A significant proportion of the pupils did not respond to at least one of the questions on discrimination felt at school: 8.4% of the non-immigrant pupils and 12.8% of the immigrant pupils.

Table 8.6 Non-immigrant and immigrant schoolchildren, according to behaviour in school (%)

		Total	Non-immigrant children	Immigrant children
Have never broken the rules		64.0	62.4	66.0
Have broken the rules	1-3 times	22.8	24.0	21.2
	4 + times	9.0	9.2	8.7
	Total	36.0	37.6	34.0
Total		100.0	100.0	100.0
Without disciplinary proceedings		90.8	91.1	90.4
With disciplinary proceedings	1 case	5.1	4.8	5.6
	2 or more	3.2	3.2	3.1
	Total	9.2	8.9	9.6
Total		100.0	100.0	100.0

Source: Survey of 2nd cycle basic education pupils (Lisbon and Loures) – IALL (2003).

Table 8.7 Non-immigrant and immigrant schoolchildren, according to feelings at school and assessment of school (%)

			Total	Non-immigrant children	Immigrant children
Feelings at school	Degree of discrimination *	Maximum discrimination	8.0	7.5	8.6
		Discrimination	66.2	66.8	65.3
		No discrimination	25.8	25.7	26.1
		Total	100.0	100.0	100.0
	Emotions	Never feels anger	41.8	42.0	41.5
		Never feels fear	59.2	59.1	59.2
		Never feels sad	44.7	44.5	45.0
		Never feels bored	24.8	21.2	29.4
		Never feels shame	56.6	63.8	60.7
	Assessment of school	The best aspect of school	Social contact / free time	29.7	33.4
Physical conditions			25.1	21.7	29.9
Sporting activities			17.8	18.4	17.0
Teachers			21.7	21.7	21.7
The worst aspect of school		Physical conditions	38.5	38.2	39.0
		Schoolmates	17.7	15.2	21.2
		Teacher	6.2	5.3	7.5
		Learning	6.2	7.7	4.1
What s/he would change		Physical conditions	42.2	43.2	40.7
		Schoolmates	16.6	15.5	17.9
		Teachers or other staff	7.4	6.5	8.5
		Times (lessons, free time)	7.2	8.8	5.2
	Food	3.6	2.5	5.2	

Note: Maximum discrimination: they feel there is discrimination by the teachers, the non-teaching staff and their schoolmates; Discrimination: they feel there is discrimination by the teachers or the non-teaching staff or their schoolmates; No discrimination: they say that discrimination does not exist in any of the cases mentioned; NR: no response to some question and, where they respond, they declare that there is no discrimination.

Source: Survey of 2nd cycle basic education pupils (Lisbon and Loures) — IALL (2003).

Table 8.8 Non-immigrant and immigrant schoolchildren, according to their relationship with the course subjects and the teachers (%)

		Total	Non-immigrant children	Immigrant children
Subject liked most or least	Portuguese (+)	12.5	11.6	13.6
	(-)	9.3	8.1	10.8
	History of Portugal (+)	9.8	9.6	10.0
	(-)	20.2	16.9	24.4
	Mathematics (+)	13.4	12.0	15.3
	(-)	21.6	22.9	20.0
	English (+)	10.3	7.3	14.2
(-)	17.8	20.1	14.7	
Relationship with teachers	Visual and technological education (+)	13.2	14.1	11.9
	(-)	4.7	4.7	4.7
	Physical education (+)	25.2	27.6	21.9
	(-)	1.9	2.1	1.7
	Understands the teachers' explanations	76.7	78.2	74.7
	Feels motivated to take part in lessons	76.3	80.3	71.1
Feels that there is help when answer is wrong	52.6	54.6	50.0	
Feels respected	73.7	78.6	66.4	
Feels that there is discrimination	32.0	31.0	33.0	
Feels that the teachers are his/her friends	64.2	68.7	58.3	
Likes the teachers	68.6	67.5	70.0	

Source: Survey of 2nd cycle basic education pupils (Lisbon and Loures) – IALL (2003).

pupils give to the “human side” of school (to the people who make it up). Another point worth noting in this regard is their discontentment with the food offered by the school.

Aspects more specifically related to learning (times, timetables, subjects) are referred to less in the criticism from the children of immigrants (and less value is attached to social contact and free time), given the importance that learning assumes in this specific group of students.

Another dimension surveyed with regard to the experience of day-to-day school life was the respondents' relationship with the course subjects and the teachers (table 8.8).

Among the subjects mentioned most by the students, physical education, visual and technological education and Portuguese are liked more than disliked. On the contrary, the balance for mathematics, English and the history of Portugal is negative. A comparison of the two groups under analysis identifies the more favourable relationship that immigrant children have with English and mathematics and their particular dislike of the history of Portugal.

Despite the fact that the relationship with teachers is more difficult in all the aspects examined and though they say that they feel the teachers care less for them, immigrant schoolchildren register a greater liking for their teachers. The learning and the teachers associated with it may not be perfect but, fundamentally, they are “unquestionable” or “unconditional”.

The schoolchildren's educational plans and aspirations

With regard to their plans for the education to be gained and their chances of achieving it, the only difference between immigrant children and their schoolmates is in their greater uncertainty (over 10%) and weaker conviction (under 9%) that they will be able to carry out their plans (table 8.9).

It is interesting to compare these plans and expectations with those of the pupils' parents (presented in table 8.5). On the one hand, the children have less ambitious educational plans; on the other, the undefined/absent educational plans of immigrant parents (27%) do not seem to play a decisive role when their children make their plans. In contrast, for non-immigrant pupils, the absence of a clear goal to be reached affects the children more than their family members.

Table 8.9 Non-immigrant and immigrant schoolchildren, according to their educational representations and expectations (%)

		Total	Non-immigrant children	Immigrant children
Educational plans	Up to grade 9	10.4	10.5	10.2
	Up to grade 12	14.0	13.9	14.2
	Up to university	49.9	49.5	50.6
	As far as possible	21.3	22.7	19.4
	DK/NR	4.4	3.4	5.6
	Total	100.0	100.0	100.0
Expectations of carrying out their educational plans	Yes	55.6	58.9	51.4
	No	2.5	3.4	1.4
	DK/NR	41.8	37.7	47.2
	Total	100.0	100.0	100.0
Importance of educational level for the future		34.8	36.6	32.5

Source: Survey of 2nd cycle basic education pupils (Lisbon and Loures) - IALL (2003).

Concluding notes

The school population resulting from the dynamics of immigration has become a particular object of attention in national and European political, scientific and media agendas. From the policy point of view, it has been possible to record and recognise disconnected initiatives and legal mechanisms in Portugal, introduced with the objective of integrating this population — though their real impact is unknown.

It is particularly difficult to offer a diagnosis of the situation in this country since, in addition to the limited data production and fluidity of that production, classification criteria vary, a large part of the data collected is not processed (due to the lack of human and technical resources at the Ministry of

Education) or the question formulation in the surveying of the school population is inadequate.²² The scant data officially available reveals a marked diversity in the school careers of immigrant children.

The little research that has been carried out on this subject has only very recently begun to include broad perspectives in which social and cultural factors are considered conjointly. With the analysis of the IALL survey results, in which the descent of the pupils was combined with the social condition of their families, it was possible to show that, among immigrant children, there is no general trend towards less successful school careers. The better results that, on the contrary, they obtain when their families have a more limited cultural capital indicate the over-investment that these pupils (and their families) make in their education. Neither the pupils surveyed nor their families (according to them) show a difference in their expectations of the educational level to be attained. Also, in the frequency with which behaviour led to punishment at school, there were no significant differences according to the groups of pupils. The brief analysis carried out allowed us to learn that, in comparison with their non-immigrant schoolmates, immigrant children feel they receive a little less support from teachers, are more displeased with their schoolmates' behaviour and are less critical of their school's physical conditions and of the learning process, to which, to a greater extent, they attach central importance within the school context.

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22 With the application of the IALL survey it was possible to ascertain the marked diversity in the criteria adopted by schools when completing the *Entre culturas* instruments of notation, a lack of precision that is furthered by the terms proposed by the Ministry of Education.

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Transitions in youth Trajectories and discontinuities

Maria das Dores Guerreiro, Pedro Abrantes, and Inês Pereira

In advanced societies, youth constitutes a stage in life that is socially marked by particular structural conditions and specific cultural behaviour. The profound changes that are taking place in these societies, both in the economic and political arenas, as well as in terms of family relationships, inevitably end up by interfering in the way the young generations live their daily lives, play their roles in the transition into adulthood and equate the future. The study of the conditions and lifestyles, the positions and dispositions, the space and time, the pathways and projects, values and social practices that characterise the youth have formed an area of interesting research and debate in Portuguese sociology. The multiple purpose of this research has been to analyse relevant phenomena of today's society, to examine the trends for the society of tomorrow and propose policies for their fulfilment. Indeed, the research conducted on young people sheds light on foreseen social changes and helps to understand the characteristics of the contemporary world. The behaviour and attitudes of the younger generations act as a barometer that could anticipate what future societal configurations could be.

The present chapter analyses how young people live their lives in contemporary Portugal based on several national and European studies in which this team has taken part.¹ This chapter also presents the main results of some other sociological research that has been conducted in this sphere in our country.

1 Orientações dos Jovens Portugueses sobre o Emprego e a Família (Orientation of Portuguese Youth on Employment and Family); Gender, parenthood and the changing European workplace: young adults negotiating the work-family boundary (Transitions), 2003-2005; Os Jovens e o Mercado de Trabalho: caracterização, estrangulamentos à integração efectiva na vida activa e a eficácia das políticas (Young People and the Labour Market: characterisation, constraints to the actual integration in active life and policy effectiveness), 2004-2005; Trajectórias escolares e profissionais de jovens com baixas qualificações (Educational and professional pathways of poorly qualified youths), 2007.

Youth: from social category to ideology

While “youth” is unequivocally present in the problems associated to the characterisation and study of advanced societies, impregnating the meanings endowed on countless individual actions and many social phenomena, its immediate conversion into a social category is also contested and its very volatile shape and analytical fragilities should be recognised. The status, the significance and the heuristic value of the concept are therefore not consensual within the scope of sociology and have given rise to heated debates.

Youth as a social category is conspicuously absent from traditional societies. In socio-historical terms, the emergence of this new social status can be identified in the 20th century. This is particularly so in the context of modern cities where spaces are created to extend the educational trajectory for the acquisition of formal skills and qualifications; the subsequent delay in entering the labour market means that young people are economically dependent on their families or the state² for increasingly longer periods of time as they keep out of the productive sphere but, on the other hand, they do develop very significant autonomies in terms of social networks, cultural identities, lifestyles and life projects. New forms of cultural urban expression which at times are not socially integrated have gradually started to flourish in this space; this gives rise to tensions with dominant powers which sometimes become violent. It is not only the generator of new dynamics and movements, of numerous freedoms and accomplishments, but is also filled with anxieties, repressions and exclusions.

Particularly at times of profound social change, sharing this common status and specific socialisation experiences leads to singularities in relation to historical consciousness, skills and projects (Pais, 1999a) that is reinforced by (and reinforcing) affinity and identification processes. A paradigmatic example is the special relationship young people have with technology. TV, internet and mobile phones today are interweaved into the daily lives of young people and brings a whole new scope to the opportunities, social networks, life styles, means of communication and identity construction mechanisms because it allows a significant separation in terms of the co-presence situations and the involvement in global relationships and even communities (Cardoso *et al.*, 2005). A different relationship with sexuality and the body can be another of these emerging phenomena, which has already attracted the attention of some researchers in the field (Cabral and Pais, 2003; Ferreira, 2007).

In the 1960s and 1970s, the idea spread in sociology and in society as a whole that youth was a group or even a social movement with strong internal

2 As in many different European countries, where young people can benefit from different forms of state support, namely scholarships or long-term loans, for the acquisition of academic qualifications and attainment of individual autonomy conditions.

solidarity and significant disruptive potential in cultural and political terms (Bebiano, 2002); this idea was fed by several emancipation theories as well as by moral panic. The existence of a generation with new lifestyles and values, ways of socialising, forms of political intervention and some self-awareness that was not only drifting away from the dominant culture but also frequently opposed it thus creating the profile of a counter-culture, was the focus of attention and debates among sociologists worldwide.³ A cultural universe was formed that consisted of new libertarian and experimentalist practices, non-linear life projects, critical of industrial societies, new aesthetic arrangements in particular in the field of music, a new occupation of space and time (such as the night), the use of new drugs, amongst other things which was thought to be relatively homogeneous and opposed to established powers.

To some extent, this approach is present in the groundbreaking study by Sedas Nunes (1968) on Portuguese university students at a time when the contradictions of the New State were becoming increasingly more manifest and student protests were hotting up. Later, the public interest in a transforming power and the social problems associated to younger age groups, particularly in a fast changing society like that of Portugal, led in the 1980s and 1990s to the development of several quantitative characterisations of the “youth condition” (Cruz, 1984), youth in Portugal (the ongoing work between the *Instituto de Ciências Sociais* (Institute of Social Sciences) and the *Instituto Português da Juventude* (Portuguese Institute for Youth) is of particular note here (AA.VV., 1988; Pais and Cabral, 1998; Figueiredo, Silva and Ferreira, 1999; etc.) and in specific areas such as Loures municipality (Almeida *et al.*, 1996).

However, the underlying openness and plurality of societies in advanced modernity, the acknowledgement of the enormous diversity of “youth cultures” — closely linked with the social conditions and contexts in which they develop — and the non-existence of a strong “generational awareness” have led many sociologists to devalue the concept of youth in the singular (Pais, 1993; Lopes, 1996). Within this framework, more emphasis has gone to studies on certain youth-related social practices, such as inter-rail (Santos, 1999), the use of the night (Sanchez and Martins, 1999), volunteer work (Santos, 2002), on certain youth “tribes” that stand out for their artistic and (sub)cultural forms (Santos *et al.*, 2003; Pais and Blass, 2004; Ferreira, 2007) or that share similar structural positions, e.g. “university students” (Machado, Costa and Almeida, 1989; Fernandes *et al.*, 2001; Almeida *et al.*, 2003), the “youth political elites” (Cruz, 1990) or the “offspring of immigrants” (Ferreira, 2003). The groundbreaking approaches of

3 Such political youth movements would have established an empirical subject for the main sociological studies that some authors associate to the institutionalisation stage of sociology in Portugal.

the studies conducted in Portugal and which are a reference for many should also be stressed here, e.g. those of Gilberto Velho on middle class youths in the southern area of Rio de Janeiro (1998).

The actual relationship of young people's identities with the conditions, experiences and projects in more institutional contexts such as school and work is again emphasised, as opposed to the irresistible desire of picturing young people immersed in leisure; rather than dissolving, nowadays this relationship seems to be more diffuse, complex and problematic and contributes to its internal diversification and extension, or even blocking, of the transition process into adulthood (Guerreiro and Abrantes, 2004).

Over the last decade, different sociological studies have revealed a growing vulnerability to the social exclusion dynamics among certain youth segments. This phenomenon tends to be associated to some of the more serious social problems of today's society, such as unemployment, abject poverty, isolation, marginal lifestyles, criminality, alcoholism or drug addiction (Ferreira, 1999; Garcia *et al.*, 2000; MTS, 2000; Pais, 1999b and 2001; Carvalho, 2003). In general, these studies point to the need for more incisive social policies and are sometimes integrated and reinterpreted in constant public debates, giving rise to intersecting reflective processes that are characteristic of advanced modernity.

Moreover, the concept of youth is becoming increasingly intertwined with the language and daily lives of modern societies, tied to symbolic-mediatic processes of global proportions. On one hand, certain more cosmopolitan and liberal cultural values and practices tend to disseminate (or persist) among more adult age groups that compare youth to one or several ideologies. On the other hand, powerful financial groups and "entertainment industries" dedicate themselves to constantly producing and imposing new aspects of a young lifestyle on consumers, each with their own icons and languages. As a result, youth cultures today appear without part of their disruptive potential which is the object of intense media coverage, globalisation, trade and even folklore, but as a product of sophisticated audiovisual machines; this penetrates strongly into the global collective imagination largely to stimulate the need for a wide range of other products. Hence, some authors have been issuing warnings about the dangers of the individualisation, "commodification" and privatisation of youth experiences (Furlong and Cartmel, 1998) or, in general terms, the definition of actors who are intensive consumers and are becoming increasingly excluded from the production spheres and citizenship (Harvey, 2001).

As a result of this core phenomenon, in which culture and commerce are profoundly intertwined, being or looking young has become a new dominant "life ideal", a new form of capital that can be acquired by means of a demanding consumption and "technologies of the self" and which is therefore a decisive participant in the individual mechanisms of self-reflection and identity (re)construction. In a complex game between biology and ideology, being seen

as “young” is a specific rarity nowadays which must in part be bought in the market and integrated on a daily basis by means of continuous (re)socialization. This process takes place in a context of deep social inequality, and even reinforces it because different types of economic, cultural and social capital are required that exclude anyone — including paradoxically some in the younger age groups — who does not own or cannot reconvert this capital.

In short, the concept of youth is far from dissipating but is becoming increasingly more polysemous. It plays a central and ambiguous role in the dynamics of modernity, either embodied in a specific age group though with extremely varying limits that tend to extend in time, or presented inter-subjectively as a life ideal. The interacting effects of this categorisation require continuous processes of double hermeneutics in social terms and, on a personal level, permanent dynamics between the biological and the social of identity (re)construction.

From non-linearity of transitions to adult life

While the youth category is challenged by various sociological reflections, the “transition to adult life” concept has been the subject of a number of studies that explore its dynamic, self-reflective and multidimensional profiles. Although this transition is already considered a classic subject of the anthropology of primitive societies (see for example Van Gennep, 1960), in fact, this process in modern societies tends to be prolonged and involve various dimensions and complexities. It is the stage not only of several opportunities but also of risks and particular vulnerabilities especially in the transition from the educational systems into the labour market (Mauritti, 2002; Pais, 2001; Guerreiro and Abrantes, 2004).

The passage into adulthood is therefore presented as a socially established trajectory, based on fields of specific opportunities and shaped by life histories and projects which, though individual, still reflect a series of social dynamics. Between structure and action, individuals are confronted by an unprecedented diversity of choices and freedoms as well as obstacles, limitations and constraints which can generate frustrations and de-structuring. On closer analysis, this transition is found to consist of an identity restructuring process that includes the wide ranging transformations taking place in the multiple spheres that form people’s lives.

The transition to adult life is therefore built on different transitions, namely: leaving school, getting a job, moving out of parents’ home, starting cohabitation and having children. Generally, this five-stage process, usually in this order, tends to be considered as the complete and linear ideal-typical transition to adult life in which this transition should be followed by additional modifications of values and lifestyles, for example in assuming certain responsibilities that overlap a predominantly hedonist view of the world.

However, the data gathered suggest that this profile of the transition to adult life varies according to the individuals and social contexts they inhabit. In other words, it is found that (1) each of the above mentioned stages is experienced differently according to the individuals' structural conditions and agencies, and can occur at different times of life; (2) the interdependence relationships and the sequence between the different stages also vary greatly and are marked by the youths' structural positions and by the cultural dispositions. There is therefore a permanent tension in the transition process to adult life between patterns of linearity and complexity, individual action and social structures (Guerreiro, Abrantes and Pereira, 2004).

On the other hand, the notions of biographic linearity and continuity are found in the young people's discourse and their life projects, in particular amongst the most qualified segments of the population. However, when faced with the empirical reality, a myriad of possible transition paths into adulthood can be seen which occurs in many cases in a non linear way. Empirical evidence, such as the extension of the educational cycles to lifelong learning, early school drop-out, the precariousness and increasing flexibility of the labour market, the diversification of the forms of conjugality or the decrease in the fertility rate suggest a diversity of trajectories. These phenomena must therefore be examined more carefully for a full understanding of the different patterns of transition to adult life.

It should also be taken into account that while this multiplicity of trajectories is a trait of modernity present in different European societies, the Portuguese case has its own specificities resulting from profound historical mutations in recent decades and the simultaneous overlap of layers of modernity and tradition in a context marked by weak State intervention with regard support for the transition to adult life (Brannen *et al.*, 2002).

A two-stage model: the right age

The transition to adult life is organised around the socially constructed notion of the existence of a deep-seated dividing line that separates youth from adulthood, called a two-stage transition, which is particularly emblematic of this generation (Lewis *et al.*, 1999; Guerreiro and Abrantes, 2004).

This form of organisation of the individual biography stands out in particular in the process of entering conjugality and parenthood. On one hand, youth is seen as a hedonist time for experimentation, right for having one or more loving relationships with varying degrees of seriousness and other experimental relationships that can have different social classifications. Between passing acquaintances, friendships and loving relationships, a triangle of easily transposed relational continuities is built. On the other hand, adulthood is seen as a stage in life that requires responsibility, "settling down" and starting one's own family. There is an underlying notion of a "psychological

barrier" that divides the age for amusement and experimentation from the age to assume family and social responsibilities. Marriage is therefore a key rite of passage that determines the end of a certain lifestyle. So it is celebrated with a bachelor/hen party, a ritual that establishes the end of a fundamentally hedonist cycle. Though this trend is observed throughout Europe, it is particularly striking in countries like Portugal where young people usually postpone leaving their parents' home until the start of conjugality.

This dichotomist conception which is widespread at the level of common sense tends to be reproduced by many of the youths interviewed, at least in terms of life plans. Many postpone their plans for conjugality and parenthood due to professional, academic or lifestyle reasons, but most tend to make plans for the time in the future when they will finally settle down. The irresistible desire to make the most of youth as a lifestyle and ideology is followed by the interiorised notion of the moment when life will be changed in a more or less distant future; this is momentarily placed "on hold" (Guerreiro and Abrantes, 2004; Guerreiro *et al.*, 2005), until opportunities or circumstances appear that allow a few steps to be taken towards the transition to adult life. This transition takes place in a process, increasingly characterised as neither linear nor irreversible, rather than at one particular moment.

From the perspective of an identity analysis, this two-stage model provides important clues. The model reveals the integrated notion of biographic continuity and the reflective project of a "self" that is capable of visualising him/herself in the future and, to a certain extent, of colonising him/herself, but that more or less consciously postpones the moment of identity reconstruction (Hockney and James, 1999). At the same time, the notion of "the right age" reveals a social construction often reinforced and controlled in the inter-peer relationship, of identity categories that tend to appear in identity "kits" that group what should or should not be done at a given moment.

However, and despite the reproduction at the representation level of this two-stage model, the transition trajectories to adult life are varied and are conjugated in different ways, which are increasingly being expressed not at specific moments but in reversible processes and trajectories. Mention is often made of the diversification of the forms of conjugality in contemporary society and the relative loss of the centrality of wedlock. Although this notion has been exacerbated at times, the co-existence of different alternative profiles of conjugality should be stressed that involve forms of cohabitation out of wedlock, cohabitation dissociated from conjugality, family rearrangements resulting from previous conjugal break-ups, as well as the constitution of homosexual couples. These have not only become more preponderant but are also more visible and accepted in contemporary society. The age at which the first experience of conjugality occurs also varies and is strongly conditioned by the social group under analysis. In some cases, it starts with a more informal period of experimenting life as a couple, perhaps with different

partners, and this tends to increasingly delay the age at which the conjugal bond is formalised. In the very short period since the dawn of the new millennium, the average age of first time marriages in Portuguese society has changed from 25.7 to 27.5 years for women and from 27.5 to 29.1 for men (INE, *Indicadores Sociais*, 2007).

As for parenthood, the fertility rate among younger age groups has declined significantly; however, the age at which mothers give birth for the first time has risen⁴ and often occurs once the other transitions to adulthood, namely the end of school life and professional insertion, have already taken place. The average age for the fertility rate has slid rapidly from 25-29 years in 2000 to 30-34 years. However, it is worth mentioning that the age of entry into parenthood is strongly conditioned by the young person's work situation. In general terms, the most qualified postpone parenthood for professional or academic reasons, considering stability at this level and as a couple a pre-requisite for parenthood. Less qualified young people tend to have children earlier and in a less stable context, revealing fewer planned strategies and expectations for building a more solid career by furthering their qualifications (Guerreiro *et al.*, 2007). Here, it should be noted that early marriages and parenthood among young people in more unfavourable circumstances persist in Portugal unlike those who have more advantageous socioeconomic conditions. Though the latter value the setting up of a family as a desirable future, they tend to prolong the period of experimental relationships and postpone significantly the age when they "settle down", get married and have children.

The two-stage model that separates youth from adulthood therefore reflects the relationship with employment, separating the educational trajectory from starting work. However, as can be seen in the next section, there are also many situations, positions and dispositions in this area.

Unfinished trajectories

The centrality and diversity of training and educational experiences is another unequivocal trait of today's youth, as opposed to that of previous generations. It is not by chance that many scholars in contemporary society have called it a "knowledge society" thereby revealing the central role it assumes in economic and cultural terms. While youth emerged largely from the expansion and the massification of the school trajectories, it should be noted that formal education or its absence has never had such a great influence on the trajectories, daily lives and projects of Portuguese youth as it does today.

4 The mothers' age for their first born has gone from an average of 26.5 in 2000 to 28.1 years of age, in 2006 (INE, 2007). There still is no official data published on the father's age.

Nowadays there are no coherent homogeneous trajectories restricted in time, but a huge array of educational experiences assured by the state and by the market and which take various forms (academic courses, professional courses, vocational training, workshops, post-graduations, industrial placements) and with a varying relationship with the labour market. People often return to education even after the start of their working life, due to a “desire to learn” and/or needs imposed by the precarious work situations — both of which are increasingly growing trends.

Seeking to make up for considerable backwardness in relation to other European societies, the secondary and higher education systems have been expanded over the past decades and there has been an exponential, albeit insufficient growth in the academic and professional qualifications of the younger generations (Almeida, Costa and Machado, 1994; Grácio, 1997; Sebastião, 1998; Figueiredo, Silva and Ferreira, 1999). As seen in the CIES research line (Almeida, Costa and Machado, 1988; Machado, Costa and Almeida, 1989; amongst others), the university experience is no longer the privilege of an elite and, despite a clearly asymmetric social recruitment base, it has enabled some segments of Portuguese society to build upward moving social trajectories, more heterogeneous social networks and new value structures.

Associated to this rise in schooling, we find that the literacy levels of young Portuguese people are higher than the older generations (Benavente *et al.*, 1996); they have more favourable socio-professional positions (Costa *et al.*, 2000), more regular reading habits (Lopes and Antunes, 2001), a closer relationship with science (Costa, Ávila and Mateus, 2002), greater awareness of environmental issues (AA. VV., 1988), greater penetration in the network society (Cardoso *et al.*, 2005), amongst other unequivocal indicators of modernity. Moreover, there is a greater predisposition and willingness to learn more, confirming the cumulative character of this phenomenon.

At the same time, the expansion and diversification of educational opportunities blurs the boundaries between being in or out of the educational system; it generates perpetually unfinished trajectories, embodied in the new expression “lifelong education”. The transformation of the economic structures has made specialisation processes, on-the-job training, sandwich courses, vocational conversion and ongoing updating and recycling to be increasingly seen as central and even decisive for the survival of companies as well as young employees. In a recent study (Guerreiro, Abrantes and Pereira, 2004), the omnipresence of training experiences and projects could be observed in the discourse of both directors and young professionals of different organisations at European level, even though there was some tension about the financial and labour overload that accompanies these learning experiences. The trend is thus for education to cease to be a stage in life coming just before the transition into adulthood and to become a permanent dimension of life in modern society though with varying intensities and modalities.

While Portugal stood out for the lack of investment made by both companies and the state in professional training systems — particularly in the period of accelerated expansion of schooling when these systems had reached their maximum in most countries — it is fair to point out that vocational training was developed considerably in the 1990s partly as a result of European Union funding (Azevedo, 2000). Its importance is now acknowledged in the discourse and trajectory of many young people, albeit as a way of “escaping unemployment” in particular among those who were initially unsuccessful in more general and academic trajectories, but also identifying the path that can lead to social and professional valorisation (Guerreiro *et al.*, 2006).

On the other hand, the centrality of education is also reflected in the social exclusion processes associated to the massive persistence of problems such as the cumulative failure and early drop out of school among many young people in Portugal. According to 2006 data, 39.2% of young people between the ages of 18 and 24 years have no more than the ninth grade and do not continue with any type of schooling; this compares with an average of 15.2% in the EU-27. Amongst young people between the ages of 20 and 24 years, 50.4% have no more than basic schooling, while the European average is 22% (Eurostat, 2006). More serious still, these figures are significantly higher in certain regions of the country, social classes and ethnic groups.

With regard to this, a number of sociological studies (Benavente *et al.*, 1994; Lopes, 1996; Garcia *et al.*, 2000) have been analysing the massive size of this problem which has still not been eradicated despite the positive evolution in recent decades. They have related it to both the specific dynamics of Portuguese society and its strict and selective educational system and noted that the multiple policies launched in these fields over the years by the different governments have obtained only partial results. In fact, Portugal has particularly high school failure and drop-out rates within the different educational cycles — from basic to higher education; this suggests that the social demand made by young people and their families has not always corresponded to an effective integration in a school system, in which bastions of anachronism continue to sustain innovation projects.

The interviews made to a wide number of young people confirm that a very significant number are still not integrated in the educational system, accumulate failures and punishments, find no meaning in school work and come up against difficulties in dealing with situations and circumstances that are ultimately a motive and justification to drop out of school and enter the labour market as soon as possible and without any type of qualification (Guerreiro and Abrantes, 2004; Guerreiro *et al.*, 2006; Guerreiro, Cantante and Barroso, 2007). In many cases, these phenomena of early schooling exclusion reproduce and reinforce exclusion processes from institutions and modern authorities, drastically reducing the scope of people’s opportunities and the development processes of certain regions and social groups.

The expansion of the educational process reflects, reinforces and legitimates the scenario of rapid change, non linear trajectories and profound social inequalities that characterise contemporary Portuguese youth as we have mentioned above. In other words, it enables a growing number of young people to access to a series of resources and opportunities that only exist in advanced modern societies. However, this is done in conditions that preserve or even reinforce serious processes of social exclusion that reach very considerable segments of the young population.

Precariousness and flexibility

Professional integration processes are currently marked by a parallel process of expansion in time. Finding a job increasingly corresponds not to a fixed moment in an individual's life trajectory, but to a more or less extended period. This goes from the first "odd jobs", which may even coexist for some with the full insertion in the educational system, to the obtaining of a first permanent employment contract that allows relatively stable labour integration, even if it is accepted that accessible jobs are becoming a "job for life" less and less. Between these two extremes there is a long continuum consisting of partial and temporary integrations in the employment system. The initial integration of young people in the labour market is therefore marked by precarious and insecure labour processes that occur increasingly as informal or semi-informal systems affecting almost all socio-qualification levels whatever their specificities.

In terms of the inclusion in the labour market, recent studies by CIES researchers (Guerreiro *et al.*, 2006; Guerreiro, Cantante and Barroso, 2007), using INE data (Statistics Portugal) (Census, 1991 and 2001; *Inquérito ao Emprego* [Employment Survey], 1998 to 2007), have shown that a little less than half of the young population (42%), aged between 15 and 24 years, continues to have professional work as their main means of subsistence; the figure for the northern part of the country was particularly high where there has been only a slight decrease in recent years. However, the professional activity of young generations in the 15 to 19 year old segment has decreased significantly (from 36% to 20%). DGEEP (Directorate General of Studies, Statistics and Planning) data reveal that almost all of the latter (about 90%) are employed full time; this confirms the lack of penetration of other forms of employment which do not give it flexible employment ties (Dornelas, 2006) in the Portuguese labour market as we shall see below. Moreover, it reveals that the dual insertion in education and profession life still has little expression.

The socio-professional groups to which these young people belong clearly show the profound heterogeneity of young people's conditions in contemporary Portugal. While the majority work in administrative work and services (31.6%) and unskilled work (30.2%), a very significant segment (25%)

have taken advantage of their educational and academic qualifications and already belong to the most advantaged group (directors and middle and senior managers). The considerable rise in intellectual and scientific professionals, particularly women, is set against the residual percentage of businesspersons (4.1%); this suggests a breach in the profile of the protagonist of the corporate and scientific-technological worlds, as well as the continuation among young generations of vertical and sectorial segmentations and the so called “glass ceiling” phenomenon, from a gender standpoint.

It is worth noting that youth unemployment rates are double those for adults and grew significantly between 1998 and 2007 reaching 18.1% for young people aged between 15 and 24 years and 10.5% for 25 to 34 year olds (versus 11.6% and 7.1%, respectively, in 1998), with even higher percentages for girls. Nevertheless, few Portuguese youths say they receive unemployment benefit which is due to the instability of their precarious and spasmodic professional insertions that prevent them accessing this right. This data reflects the serious and growing insertion difficulties of the young generations in the labour market and the urgency of more incisive social policies in this sphere.

In terms of work contracts, a clear increase is seen in giving term contracts to the younger generations up to 34 years of age between 1998 and 2007 (from 19.5% to 28.1%); this is well above the averages for the overall population (12.1% and 16.7%, respectively). Different studies conducted on this matter suggest the emergence of a mutating labour market where “employment is no longer lifelong” and there tend to be semi-legal forms of hiring, as in the use of *recibos verdes* (freelance worker payment receipts), temporary work and unpaid internships to fill permanent positions. Moreover, it should be noted that the informal employment of young people in parallel economies, which has been object of qualitative study by Pais (2001), also acquires very significant proportions though precise calculation have yet to be made.

Even though the processes of precarious employment are transversal across several market segments, the data gathered indicates the continuation of significant differences. The public sector continues to enjoy specific benefits. However, a study conducted in CIES (Guerreiro, Abrantes and Pereira, 2004) already noted the increased instability of jobs in this sector; this is due to the so called “new public management”, better known as the “modernisation process of public administration”, which has resulted in freezing new permanent contracts for civil servants and the widespread use of individual employment contracts. On the other hand, it can be said that the most qualified population segments, that have difficulty in accessing employment in the first years, generally tend to build a progressive career, whereas the less qualified sectors circulate much more between disadvantageous jobs, without many opportunities for progression or even to stabilise the precarious state inherent to them.

This scenario of precarious and flexible employment and particularly the feelings of job insecurity condition other life projects of young people, notably that of parenthood, by putting the entitlement to parental leave and other benefits foreseen by law out of reach for many. Couples increasingly postpone the decision to have their first child (often the only one), in the knowledge that motherhood will impact women's consolidation of their professional careers. At the same time, mobilisation and the claiming of rights is most difficult in the more precarious sectors. At this level, there are profound asymmetries between (1) activity sectors (namely between public and private); (2) different qualification and hierarchical levels; (3) men and women. In each labour context, the individuals act in a different way, conditioned by the fields of alternatives in force and by their subjective sense of rights (Lewis, 1998) as workers.

Even though young people have appropriated and incorporated the discourse on the issue of precariousness which is usually understood negatively, they tend to build it into their own strategies, making use of a multiplicity of options and benefiting as far as possible from a situation which is in theory not favourable to them (Guerreiro *et al.*, 2006). So informal and precarious work situations are also often manipulated by the youngsters. This is seen particularly amongst those with higher qualification levels who associate the idea of flexibility to these processes as a model of going between jobs. However, yet again the idea of the two-stage model is seen here because many of them believe that a period of instability should be followed by another granting more stability, that is more compatible with starting a family and accomplishing other projects that have been postponed meanwhile.

The (re)construction of social networks

In recent years, the network metaphor has assumed an increasingly preponderant role in sociological production (Castells, 2000; Wellman, 1998). The network notion as a way of relating and structuring relations between individuals, groups and institutions provides a good way of clarifying interdependence dynamics and inter-influence. One of the main added-values of this concept has been the fact that it shows how individuals get into complex relationship networks, instead of being part of closed predefined groups. The analysis of networks therefore reveals the multiple and simultaneous insertion in different social spheres which are more or less articulated with each other.

On the other hand, the transition to adult life also tends to be a process of reconstructing social networks. While youth is usually thought of as the right theatre to establish extended social networks and different social styles (Costa, 2003), adult life is characterised by the insertion into new networks, namely related to work, and for the reconfiguration of family networks.

Hence, an examination of the transition to adult life from the standpoint of reconstructing social networks may offer interesting perspectives on the circulation between social spheres, which constitutes the foundation for the moments of change in an individual's biography.

Youth, in particular when conceived in more ideological terms, is immediately associated to friendship. By definition, being young seems to mean having a lot of friends with whom one enjoys a series of social, consumer and leisure activities connected particularly to this time of life, which simultaneously involves establishing specific places-times for interaction and the parallel production of values, codes of conduct and linguistic codes. In addition, school is an important theatre for the formation of close relationships. This is the phase of life most closely linked to the participation in cultural and social associations and movements involving a lot of socialising. However, it is important to point out that these different networks are cumulative and are asymmetrically distributed in the social arena, reproducing and highlighting very significant inequalities of resources and opportunities amongst young people. Hence, youth can also be characterised by experiences of isolation linked to the breaking of bonds and previous social integrations.

This recreational and/or participative dimension often seems to be put aside on becoming an adult, particularly after the full insertion in the labour market or entry into parenthood which imply the reorganisation of the daily routine. Some young people seem to suggest that integration in the labour market implies forming relationships that are professional rather than friendships and that having children significantly changes their social lives and brings young parents closer to others in the same situation, making them withdraw from some previously shared networks (Guerreiro *et al.*, 2006). However, this is not consensual and further studies, particularly in the often unjustly forgotten area of sociology of friendship (Santos, 1989), may supply more data on the different patterns of socialising that prevail over the course of a person's life. Some studies conducted meanwhile, also by CIES teams (Guerreiro, Mauritti and Henriques, 2007), reveal the differences between the way young people who are already autonomous from their respective families of origin construct socialising networks and solidarity in comparison with the young people that still live in their parents' home.

Therefore, the reconfiguration of the family habitat, leaving the parents' home which implies readjusting the relationship with the family of origin, and setting up one's own home and an individual family project, are also part of the transition process into adulthood. In Portugal, youths tend to leave their parents' home when they marry or begin cohabiting. The percentage of young people who leave home to live alone before getting married is only small when compared with the very high percentage in other European societies (Vasconcelos, 1998; Guerreiro, 2003). This phenomenon can be explained by economic

constraints, the lack of support structures and a singular reconstruction of the cultural patterns (Guerreiro and Abrantes, 2004).

The relationship with the family of origin is therefore one of the spheres in mutation in the passage to adult life. On one hand, the entry into adulthood is usually conceived as a process of becoming progressively independent from the parental home. However, the studies carried out with young parents reveal that the more support young working fathers/mothers receive from their parents, the better their lives are, thus demonstrating the importance of the family support networks during the first few years of parenthood (Vasconcelos, 2002; Wall, 2005). Hence, entry into adulthood is often accompanied by a new relationship of semi-dependence on the preceding generation and in the absence of alternatives provided by public policies and due to the current work regimes, may imply sharing everyday life and different strategies that foster the balance between work and private life based (also) on family support networks.

Stability projects, trajectories of uncertainty

Another pattern stands out in the above mentioned studies conducted on the young Portuguese at the turn of the century. Namely, there is a contradiction between growing desires or even demands for planning, security and well being in people's daily lives on one hand and trajectories and experiences increasingly marked by unpredictability, transition and non-linearity on the other. This contradiction is only in part solved by the so called "two-stage model", and leads to a series of obstacles and anxieties in the transition to adulthood.

In contrast to the post-modern urge for a nomadic and erratic lifestyle, research has clearly revealed the predominance of an eager desire among young people to control and plan their lives; this is quite distinct from the "urgency of the immediate" which marked the biographies and the cultural manners of the vast majority of the population until the 1970s. The emergent nomad and hedonist dispositions therefore seem to characterise a privileged minority of the population or to be confined to a transitional period before the responsibilities associated to adulthood are fully assumed.

Young people frequently cite the need for the "indispensable conditions" when questioned about their life paths. Increasingly hegemonic values of modernity such as material well-being, individual responsibility and independence, relational maturity or protected childhood are presented as prerequisites before certain decisive steps can be taken such as leaving the parents' home, getting married and, above all, having children. These decisions are therefore planned by the large majority of young people, but for many they remain on hold (for a long time), until the right conditions are met. There is a particularly marked concern about the decision to have children; previously dominated by

unpredictability, today the discourse tends to be reconfigured in terms of personal responsibility, family planning and protecting the child's well-being. Moreover, it is not unusual for young people to immediately categorise anyone who does not impose these requirements on themselves as being "reckless" which is a clear demonstration of the rapid change in the patterns of expectation and self-reflection in Portugal in recent decades (Cunha, 2000).

Obviously, this set of values is not distributed homogeneously across the young population and the objective opportunities to fulfil them even less so. While in certain groups and contexts it corresponds to the chance not to lose the quality of life already provided by one's family, in some spheres it reflects emerging expectations and opportunities for security and well-being; in yet others, however, it reveals distant and unattainable dreams given the harsh contingencies of daily life. Nevertheless, it is still common for people with fewer academic qualifications and who were unable to invest much in training to face heartbreaking problems when setting goals and plans for the future; at the same time they must accommodate themselves to a work ideal that provides few guarantees of the stability and material autonomy an adult needs to assume family and parental responsibilities, even if the very immediate consumerism of a young person still living with his/her family of origin can be satisfied (Guerreiro, Cantante and Barroso, 2007). Even so, for the theoretical frameworks that reify class-based contrasts between value scales, the empirical data seems to suggest that such expectations are found today in the large majority of the young population and are much closer than the real likelihood of converting them into life styles and practices.

In fact, there is a clear gap between the growing ambitions for security and the trends for mobility, instability and precariousness identified in the labour market. In accordance with a trend mentioned above, the labour market currently offers a succession of temporary work experiences, under-employment and unemployment to young people particularly, generating profoundly uncertain and unpredictable trajectories. In this case, the values they are required to have as an adaptation strategy are flexibility, creativity, initiative, continuous learning and a capacity for change. It is true that a segment of young workers faces unusual opportunities of economic and social promotion, but in general these involve heavy demands in terms of intense involvement, competition and pressure. In short, the deregulation of the labour market opens the field of possibilities but also the margins of risk, particularly in semi-peripheral, fragile and quite uncompetitive economies such as that of Portugal today.

This constitutes a contradiction between expectations and trajectories, aggravated by a still incipient welfare state in several spheres which leads to the prolonging of the transition process into adulthood and demonstrated by the sharp rise in the average age a young person leaves his/her parent's home, gets married and begins parenthood. Portugal was a country of early

marriage and parenthood until the 1970s, marked by a traditional and Catholic society, but in recent years marriage (4.61%) and divorce (2.2%.⁹) rates are coming close to the European averages (4.88%.⁹ and 2.0%.⁹ respectively, in EU-27) and the current birth rate is remarkably low (10.0%.⁹) even in relation to European averages (10.5%.⁹). Moreover, these averages also include the significant percentages of adolescent pregnancy and marriage; though in decline, this phenomenon is generally associated to segments of the Portuguese population that have not kept up with the improvements in economic well-being and fluxes of cultural transformation (Almeida, André and Lalanda, 2002).

Even though young generations are more open and willing to experiment e.g. leaving home and living with friends or with a conjugal partner, the truth is that the cultural tradition and above all economic security make the majority of young Portuguese people stay in their parents' home until a much later age, living in a "welfare family" system (Pais, 2001) which they only leave when getting married (Vasconcelos, 1998). Whether these new life-styles reflect more hedonist cultural dispositions or, on the contrary, growing demands for planning and well-being aggravated by uncertainty in the labour market, triggers a fertile debate among researchers.

Deregulation, cultural diversity and inequality of opportunities

In short, recent sociological studies have shown a rapid change in the life patterns, paths and plans of Portuguese youth within the framework of a society that is itself undergoing great transformation. However, they also reveal large differences and inequalities in young people's experiences and conditions that persist and have even strengthened in Portugal at the start of the 21st century, thus arousing the spectre of the "dual society" of which Sedas Nunes (1968) talked in the 1960s. The portrait painted is therefore of youth marked by enormous diversity of cultural forms and dispositions, as well as by the growing inequalities of trajectories and resources in a societal framework where advanced modern networks coexist with tradition and exclusion stimulated but also deregulated by the recent opening to the globalisation process in course.

With regard to this, subsequent studies largely confirm the diagnosis made by João Sedas Nunes (1998) a few years ago. Alongside a set of generational traits, such as the maintenance of the primacy of the family, the decline of religious practices and the discrediting and alienation of politics, he describes Portuguese youth as profoundly divided between a traditional segment that is characterised by the prevalence of relatively traditional ways of life and value systems that derive from unfavourable social origins and starting active life at an early age, and on the other hand a "modern" segment who generally prolong their student life and defined by more cosmopolitan lifestyles, greater

diversity of cultural practices and loving relationships, as well as more liberal value systems.

This general framework should not conceal but foster the exploration of the enormous heterogeneity of youth universes that meet, that fail to meet and that sometimes confront each other in the urban kaleidoscope. The disparity of conditions, practices, socialising styles and “forms of rationalising the experience” opens the way to enormous cultural wealth; however, it also generates new social integration problems particularly when associated to situations of domination and great asymmetries of opportunities and resources.

Some of these forms of young people’s expressions are widely legitimised and even valued by society today and open the doors to original forms of integration, of which the relationship with technology is just one. However, others continue to be considered marginal and illicit, generating and reflecting moral panic as well as discrimination and social exclusion processes in various spheres ranging from education to work, from family to public institutions; this can block or even de-structure the ever-complex trajectories of transition into adulthood (Guerreiro and Abrantes, 2004).

Our diagnosis of intense cultural diversity and enormous social inequality reflects and is strengthened by the way that many young immigrants who have recently arrived in the country, and an increasing number of their offspring, are integrated in cultural processes, economic systems and socialising networks that may, or not, emphasise their *ethnicity* (Machado, Matias and Leal, 2006).

It is hoped that the conclusion reached from these pages is that the different spheres of social life — education, family, work, leisure — have given rise to real pressures nowadays for some kind of deregulation of the “youth experiences”. Though a privileged few can convert these above all into unique opportunities for emancipation, they simply mean actual risks of exclusion for many others. These pressures for deregulation and exclusion are, in part, increased by global developments (Beck, 1992), but also reflect the particular way in which Portuguese society has been adapting and positioning itself in response; a striking example of this is the crystallisation and even increase in the enormous disparities in quality of life, income and educational qualifications. Youth is therefore a place for the encounter/*disencounter* of these trends and discontinuities. A building with more and more rooms but whose doors are closed to a large proportion of its inhabitants.

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Life patterns in contemporary society

Susana da Cruz Martins, Rosário Mauritti, and António Firmino da Costa

Is it possible to draw a picture of the life patterns in the contemporary Portuguese society?

Such a picture will inevitably be a simplified summary: from the outset it must take account of the global context in which it exists and with which it has a multiplicity of relationships. As has been mentioned in a number of different ways, this global context is that of a society increasingly driven by science-based technological innovation and the multiplication of social networks that tend to form on the most varied scales, notably on a planetary scale.

In this context, the economic, political and cultural situations characterising cities, regions, countries, and continents change their relative weight within the fabric of global interrelations and interdependencies. We are also witnessing the emergence of a very wide range of new goods, new accesses and new opportunities, alongside an array of gaps, risks, conflicts and institutional and identity tensions and the exponential intensification of human pressure on the environment and natural resources.

Social recomposition is a fundamental element of these processes of change on a world scale. It includes very important aspects of recomposition from the geographical and age-group points of view: longer life spans, alterations in the relative weight of the various age brackets, urbanisation, and internal and international migration. It also includes the profound and comprehensive educational, occupational, socio-economic and socio-cultural recomposition that is taking place, with great intensity, in the most diverse areas of the planet and in the world as a whole.

This process of recomposition also affects the levels and distribution of resources (economic, cultural and social) and relationships with institutions (inclusion and exclusion; subjection and citizenship; publics and specialists). Ways of life are modified by the combined action of alterations in the work and family spheres, markets and the welfare state. Ways of life change in

accordance with the dynamics of homogenisation, diversification and recombination and of traditionalism, cosmopolitanism and syncretism.

In this contemporary global context, as just described in very broad terms, how do the *life patterns* of the Portuguese configure?

An attempt will be made below to provide some answers, not just of an impressionistic nature but on the basis of theoretical conceptualisation and empirical research. These contributions follow the line of a vast array of research on *social structures and social recomposition* that various CIES researchers have developed over a considerable period in connection with a variety of specific subjects of study on different scales.¹

A conceptual and operational proposal

Sociological analyses in which the social description of populations is a fundamental element have had difficulty in integrating analytical dimensions on “work”, “consumption” and “qualifications” in a theoretically consistent and empirically elucidating manner.

However, all these aspects have been seen to be crucial to contemporary forms of social existence and systematically reveal highly significant relationships among themselves. In addition, though the notion of the quality of life is vague and has many meanings, it unequivocally goes back to these areas, even if, sometimes, merely implicitly or informally. With the construction and analytical use of the concept of *life patterns* an integrated attempt is made to respond to the theoretical and operational relevance of assimilating these aspects of the characterisation of society.

The analysis of structured systems of social differences and inequalities has been a central area of sociological research from the time of its founders to the broad array of more up-to-date studies and debates. Within the scope of this topic, use has been made of concepts such as social class and class structures, status groups and stratification systems, and others such as ways of life or lifestyles. At the operational core of these analyses lie the categories and procedures for socially characterising populations. Portuguese sociology has also made significant contributions in this field.²

A problem that has not been properly resolved in key researches and the concepts that they use involves the connection between the dimensions of work and consumption. In some cases, the authors give special preference to

1 For example, among many others: Almeida (1986), Almeida, Costa and Machado (1994), Machado and Costa (1998), Costa (1999), Costa, *et al.* (2000), Machado (2002), Machado, *et al.* (2003), Casanova (2004), and Capucha (2005).

2 In addition to those referred to in the preceding note, mention should also be made, for example, of Estanque and Mendes (1997), Estanque (2000), Cabral, Vala and Freire (2003), Martins, Mauritti and Costa (2004), Pereira (2005), and Queiroz (2005).

the work/production dimension, as in Marx and in neo-Marxist ideas (e.g. Wright, 1997) or as in the analyses of socio-occupational categories inspired by Weber (Goldthorpe, 1980) or referred to by Bourdieu (Desrosières and Thévenot, 1988). In other cases the consumption/leisure dimension may be of particularly central importance, e.g. in Veblen, with his theory of the leisure class and conspicuous consumption, or in present-day analyses of lifestyles, whether empiricist (Cathelat, 1985-86) or post-modernist (Featherstone, 1991; Chaney, 1996) in inclination.

In some sociological works, the theorising and research address both dimensions, though often without systematically integrating them from an analytical point of view; or they then subordinate one of them, without reflecting it sufficiently from an operational standpoint. On the other hand, the education/training dimension, which is almost always considered fundamental, is generally only studied in depth in its relationship with one of the two above dimensions. Some analyses consider all these dimensions, in particular Bourdieu (1979) and Vester (2003). But, above all, empirical research of an extensive nature, carried out on the basis of institutional statistical indicators, has made little use of the combination of this set of dimensions, despite the prominence widely attributed to their importance.

The concept of *life patterns* seeks to put the integration of these three crucial dimensions of social characterisation into practice, taking two basic concerns into account: a demanding theoretical grounding and effective operationalisation.³ The model proposed includes the analytical axes referred to above: work/production; consumption/leisure; and education/training. Full consideration of each of these three dimensions, with an equivalent degree of theoretical development and an equivalent method of empirical operationalisation, is a central aspect of the analysis model constructed. Even more important is this provision for systematic and integrated research into the connections between them.

For this purpose, on a theoretical level, we used a set of conceptualisation elements contained in a large part of the bibliographical references mentioned above. The main hypothesis guiding the work was that, with the coordination of these three dimensions, it would be possible to find a set of patterns characterising ways of life and levels of the quality of life.

On an empirical level, the coordination mentioned and the actual verification of the hypothesis considered above demanded the combination of a

3 The analyses produced were originally developed in the project "Padrões de vida: perfis and tendências na sociedade portuguesa contemporânea (desenvolvimentos conceptuais and exploração analítica de microdados estatísticos)", carried out in CIES from 2000 to 2003 with FCT (Foundation for Science and Technology) support (POCTI/36483/SOC/2000). See Mauritti *et al.* (2002), Costa *et al.* (2003), Martins (2004), Martins, Mauritti and Costa (2004), and Mauritti (2004a and 2004b).

number of indicators for the three dimensions, carried out using multivariate analysis procedures.⁴ The most important empirical source was the Household Budget Survey (INE, Inquérito aos Orçamentos Familiares, 1999-2000). The main unit of analysis was the individual, with whom information on the household was associated.⁵

The analyses presented here involve a wide range of dimensions and are connected with different fields of social practice. The operationalisation of the socio-occupational and socio-educational dimensions, which are of central importance in this approach, is developed in depth in earlier work mentioned above.⁶ For the operationalisation of the dimensions of consumption, firstly a set of dimensions was defined to extend the analysis to various fields (besides those above) that structure the social conditions of existence and quality of life of individuals and families.⁷ It was on the basis of these dimensions (eleven in all) that, in the first phase, the indicators included in various principal component analyses (PCA) were selected (see appendices A1 and A2).

The performance of various successive PCA allowed the indicators to be progressively reduced until sufficiently aggregated and empirically tested consumption variables were created. On that basis it was possible to make a simultaneous analysis of all the dimensional blocks under study were redefined.⁸ To use the variables, in particular in the multivariate analyses, scales of categories were created with the percentile distributions as the reference (see appendices A1 and A2).⁹

4 The multivariate statistical approach included principal component analysis (PCA), homogeneity analysis (homals) and cluster analysis (cf. Carvalho, 2004).

5 This was only possible by means of access to the three SFB micro databases: 1) accommodation units, 2) households and 3) individuals. It was essentially by reference to the latter two that the analyses presented here were carried out, with the construction of a new database that included the information contained in both. It was thus possible to relate the consumption patterns of families to the specific attributes of the individuals that make them up.

6 In particular, Costa (1999), and Machado *et al.* (2003).

7 This categorisation at the starting point was carried out by combining theoretical and interpretative considerations with operational and pragmatic considerations relating to the possibilities offered (or not) by the micro databases used. It included seven dimensions for goods and consumption practices: food, housing, clothing, health, transport, holidays, and culture and leisure. It also included four dimensions relating to the equipment in the households to which the individuals belong: mass technology, new home technologies, ICT, and distinguishing objects and conditions.

8 This new set of consumption dimensions is as follows: basic food, ready-made food, housing, clothing and personal image, health, private transport, public transport and cultural practices. In addition, there were the dimensions relating to the equipment in the households to which the individuals belong: widespread technologies, new technologies and large supplementary possessions.

9 The specification of the operational procedures for constructing the variables for the dimension "consumption" can be found in Costa, *et al.* (2003).

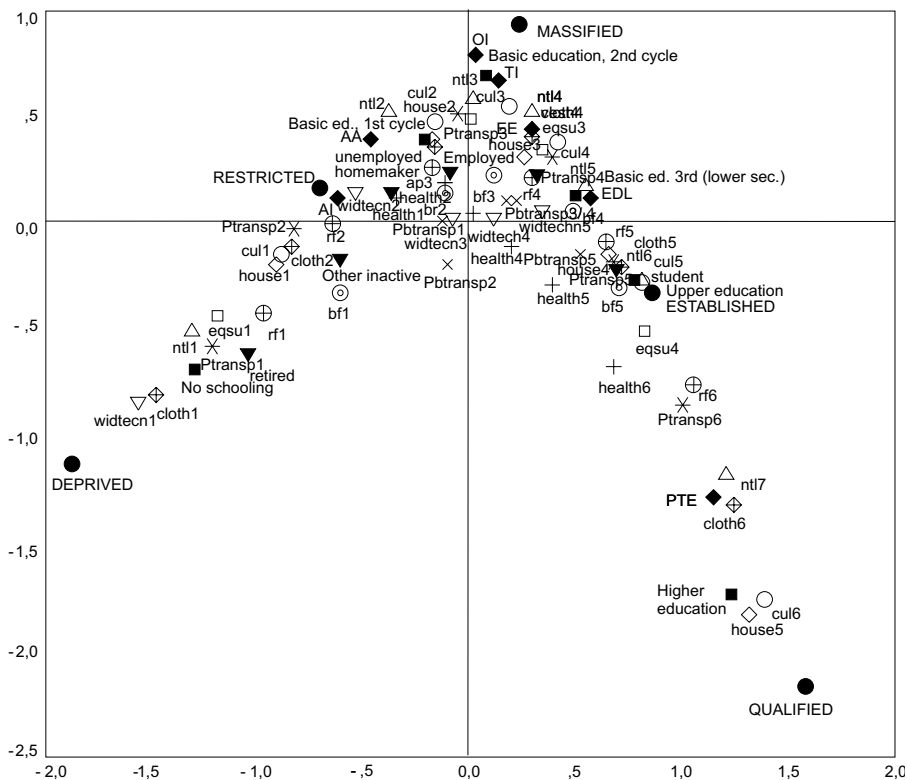


Figure 10.1 The space of life patterns

Caption: bf, basic food; rf, ready-made food; house, housing; cloth, clothing and personal image; ptransp, personal transport; pbtransps, public transport; cul, cultural practices; ntl, new technologies; widtecn, widespread technologies. EDL, entrepreneurs and executives; PTE, professionals and managers; TI, self-employed; AI, farmers; EE, routine employees; OI, industrial workers; AA, agricultural labourers.

Source: INE, Micro database for the Household Budget Survey, 1999-2000.

In a later phase, another set of multivariate analyses was performed. On the one hand, homogeneity analysis (homals) was used to construct a topological space in which the categories for the dimensions considered to constitute life patterns were distributed and projected (the dimensions of work, consumption and qualifications). In this way, it was possible to determine the general configuration of a *social space of life patterns in present-day Portuguese society*.

On the other hand, a cluster analysis was performed, in which five life patterns, distinctly different and sociologically interpretable, were encountered. Thus, a *typology of the life patterns* of the Portuguese population at the beginning of the 21st century was achieved (such as can be determined on the basis of the information available and the analytical procedures used).

Finally, by projecting these five life patterns onto the topological space constructed beforehand, it was possible to pinpoint their relative positions and clearly show their significance with reference to the social space as a whole and to the distributions within it of the indicators and their categories.

Thus the results summarised in figure 10.1 were obtained. To allude to the five main life patterns encountered, the following terms were used: *deprived, restricted, massified, established and qualified*.

The variety of life patterns

The main results of this research are, then: a configuration of the social space of life patterns, a typology of life patterns, and the location of each of these life patterns in that social space.

In the multi-dimensional topological space of life patterns, it is essential to observe and interpret the relative positions among them and the place that they hold in this space. But it is no less important to analyse the specific content of each of these life patterns in terms of the quantitative values that the many indicators used represent there. It is also important to report the size of the population covered by each of these life patterns.

In effect, the relative weight of these categories varies greatly (table 10.1). Quantitatively speaking, the massified predominate (35%). The restricted are the second largest group in this typology (24%). Between them, they cover the majority of the Portuguese population (around 60%), which is thus distributed between a life pattern with real, though modest, access to activities, resources and consumption that nowadays generally cut across the population and a life pattern characterised by the strict control of consumption, which is a correlative of fairly low occupational positions and educational resources.

In comparison with those above, the established reveal a life pattern that is fairly rich in resources. They cover 21% of the population, i.e. about a fifth of the Portuguese. At opposite extremes in this life pattern space are the deprived and the qualified, representing around 13% and 7% of the population respectively.

The following specification of each of these life patterns, according to their constituent dimensions (tables 10.2 and 10.3), allows us to capture their social meaning more accurately.

The *deprived*. This life pattern is characterised extensively and profoundly by a situation of deprivation. Around 70% of those who belong to this category have no education and, with regard to their work situation, they are mainly retired. In terms of socio-occupational categories, they essentially are farmers and industrial workers (37% and 25%, respectively). The consumption opportunities of the households to which these people belong reflect their socio-occupational positions and educational resources. Thus, this

Table 10.1 Life patterns in Portugal (%)

Life pattern	%
Deprived	12.6
Restricted	23.9
Massified	35.2
Established	21.1
Qualified	7.2

Source: INE, Micro database for the Household Budget Survey, 1999-2000.

Table 10.2 Socio-educational and socio-occupational characterisation of life patterns (%)

Indicator	Life pattern					Total
	Deprived	Restricted	Massified	Established	Qualified	
<i>Educational level</i>						
No schooling	69.4	24.7	2.6	4.4	2.1	16.7
Basic education 1 (grades 1-4)	25.6	45.4	41.7	22.8	2.9	33.8
Basic education 2 (grades 5-6)	1.9	15.8	28.9	10.0	2.3	16.5
Basic education 3/Lower Secondary education (grades 7-9)	1.5	9.3	17.7	24.6	10.6	14.6
(Upper) Secondary education (grades 10-12)	1.1	4.2	9.0	27.1	22.2	11.6
Higher education	0.5	0.6	0.1	11.1	59.8	6.9
<i>Work situation</i>						
Employed	12.2	41.2	72.6	61.6	72.5	55.2
Unemployed	2.1	5.2	3.8	3.0	2.5	3.7
Students	0.5	5.2	8.4	17.1	13.9	8.8
Retired	68.2	27.9	4.4	8.0	7.9	19.1
Housewives	11.2	14.8	8.4	7.3	2.8	9.6
Other. not economically active	5.8	5.7	2.4	3.1	0.4	3.6
<i>Socio-occupational categories</i>						
Entrepreneurs and executives	3.5	4.6	7.4	14.4	5.2	8.2
Professionals and managers	4.3	3.1	1.5	33.9	84.8	17.3
Self-employed	4.1	4.4	6.5	3.0	0.4	4.7
Farmers	36.6	11.5	2.7	1.3	0.0	4.6
Routine employees	13.7	31.7	34.6	31.3	8.8	30.3
Industrial workers	25.4	38.9	45.4	15.3	0.8	32.4
Agricultural labourers	12.4	5.7	1.9	0.9	0.1	2.5

Source: INE, Household Budget Survey, 1999-2000.

Table 10.3 Characterisation of consumer goods and practices

Type of consumption	Level of consumption	Profile					Total
		Deprived	Restricted	Massified	Established	Qualified	
Basic food	5 (high)	0.6	2.9	3.7	10.4	11.3	5.1
	4	3.5	14.2	23.1	27.2	30.4	19.9
	3	12.0	25.6	29.8	24.0	20.8	24.7
	2	24.3	27.5	27.2	20.8	17.9	24.9
	1 (low)	59.5	29.8	16.1	17.6	19.5	25.4
Ready-made food	6 (high)	0.2	0.5	2.5	10.9	18.7	4.7
	5	2.2	9.0	19.9	30.4	38.5	18.6
	4	8.5	17.3	32.6	28.4	22.4	24.3
	3	22.8	30.6	29.9	18.3	12.5	25.5
	2	23.2	20.2	10.0	5.6	3.6	12.7
	1 (zero)	43.1	22.4	5.2	6.4	4.2	14.3
Housing	5 (high)	0.6	0.4	0.2	7.7	43.1	5.0
	4	2.3	8.7	17.9	38.8	35.1	19.3
	3	7.6	20.0	32.7	28.5	14.2	24.3
	2	18.5	31.0	33.1	15.8	6.0	25.2
	1 (low)	70.9	39.9	16.1	9.2	1.6	26.2
Clothing and personal image	6 (high)	0.3	0.3	0.6	11.7	32.2	5.1
	5	1.8	8.6	18.3	37.2	43.8	19.7
	4	4.2	17.2	37.0	26.4	12.9	24.2
	3	15.1	31.8	30.2	17.2	6.9	24.3
	2	49.4	34.9	12.6	6.4	3.7	20.7
	1 (zero)	29.1	7.1	1.2	1.0	0.6	6.1
Health	6 (high)	3.2	2.8	2.4	10.3	16.3	5.2
	5	5.9	8.7	8.0	13.5	23.9	10.2
	4	8.7	8.8	8.9	14.6	12.9	10.3
	3	24.7	22.2	27.1	25.1	21.0	24.7
	2	17.5	19.9	22.4	14.7	12.2	18.8
	1 (zero)	40.0	37.6	31.2	21.8	13.7	30.6
Private transport	6 (high)	0.1	1.5	2.6	10.0	23.9	5.0
	5	0.8	9.4	19.3	34.1	48.4	20.0
	4	1.6	15.2	35.6	31.5	18.8	25.0
	3	6.7	28.1	36.5	16.6	6.1	25.0
	2	11.7	11.3	3.0	2.5	1.0	5.7
	1 (zero)	79.1	34.5	3.1	5.2	1.9	19.3
Public transport	5 (high)	1.2	4.5	4.6	7.2	9.2	5.1
	4	4.4	9.9	11.3	10.1	11.4	10.0
	3	6.3	9.8	11.1	10.0	11.0	10.0
	2	11.3	7.7	6.4	8.4	11.7	8.0
	1 (zero)	76.8	68.2	66.6	64.2	56.7	66.9
Cultural practices	6 (high)	0.1	0.2	0.5	7.7	43.7	5.0
	5	1.0	6.3	15.7	46.7	44.4	20.2
	4	0.7	4.9	15.2	11.8	4.6	9.4
	3	2.7	11.5	23.6	13.1	3.1	14.4
	2	9.0	22.4	24.3	10.3	2.6	17.4
	1 (zero)	86.5	54.7	20.6	10.5	1.5	33.6

Source: INE, Micro database for the Household Budget Survey, 1999/2000.

Table 10.4 Characterisation of the equipment in households

Type of equipment	Level of equipment	Profile					Total
		Deprived	Restricted	Massified	Established	Qualified	
Widespread technologies	5 (all)	9.9	18.6	25.4	34.1	32.1	24.4
	4	24.3	30.0	34.9	36.4	41.5	33.3
	3	24.9	26.7	25.8	23.6	22.1	25.2
	2	17.9	18.7	13.0	5.1	3.8	12.6
	1 (up to three)	23.0	6.1	0.9	0.8	0.5	4.5
New technologies	7 (all)	0.1	0.7	2.7	27.5	62.9	11.2
	6	0.6	3.0	8.4	22.8	21.6	10.1
	5	0.2	5.6	15.9	20.5	10.2	12.3
	4	0.4	9.3	22.7	15.1	2.7	14.1
	3	2.9	16.7	25.0	8.8	1.8	15.6
	2	8.8	27.7	21.0	3.3	0.5	16.1
	1 (none)	87.1	36.9	4.5	2.0	0.4	20.5
Large supplementary possessions	4 (3 or more)	0.9	7.9	13.3	45.5	70.5	21.3
	3	2.1	18.1	36.6	27.4	21.5	25.4
	2	8.4	28.8	43.6	22.9	6.7	29.3
	1 (none)	88.6	45.3	6.6	4.2	1.3	24.0

Source: INE, Micro database for the Household Budget Survey, 1999/2000.

life pattern shows up as the one that presents the least ability to engage in practices of consumption. Health expenses are the exception, in which they record greater indices of expenditure than the restricted. This may be at least partly due to the concentration of older people in this category.¹⁰ It is also of interest to stress the population's access to certain mass technologies (e.g. television, the refrigerator or the telephone). The way these cut across the various segments of society reveals the fact that, today, the constraints of social inequalities do not counterbalance, in a linear way, the trends towards the widespread adoption of technological instruments for daily use, which have become goods of primary necessity in contemporary societies. (The same is happening, as has been seen, with the consumption of certain specialised health goods and services).

The *restricted*. The individuals who represent this life pattern also have fairly limited educational resources, albeit a little less than those above. Though the number of those who have no schooling at all is also enormous (25%), the group of those who have completed the first cycle of basic education (grades 1-4) is greater (around 45%). As far as their work situation is concerned, the unemployed make up the category with the greatest weight

10 On this topic, see the work of Rosário Mauritti (2004a and 2004b) on the life patterns of the aged in Portugal.

(41%), though, here too, a significant occurrence of economic inactivity is to be seen (28% are retired and 15% are housewives). Their socio-occupational positions register a strong predominance of unskilled wage earners in the services sector and industry (routine employees: 32%, and industrial workers: 39%). Despite a certain presence of farmers (12%), this pattern reveals a predominant trend towards life contexts of impoverished (sub)urbanisation. With regard to consumption, while it is situated at levels of basic sufficiency, their expenditure stretches slightly in a set of essential goods such as housing, food and clothing.

The *massified*. They represent the most widespread life pattern in Portuguese society today. Their levels of schooling are a little higher than those of the restricted, although they are mainly situated within the limits of basic education (grades 1-9). From the point of view of their work situation, by far the most numerous category is made up of the employed (73%), thus reaching a proportion that is only equalled by the qualified. From the point of view of socio-occupational categories, this is the life pattern that covers the greatest proportions of industrial workers (45%) and routine employees (35%). The forms of consumption that mark out this life pattern are broader-based than those mentioned above: they are associated with the appearance of contemporary consumer society, which has at its disposal a relatively varied range of goods and services, accessible to very extensive social strata.

The *established*. This group corresponds to a life patterns with generally broader consumption, in particular with regard to material goods for daily use, such as food and domestic technologies. But this relative homogeneity in consumption overlies a marked internal division at the educational and socio-occupational levels. One part merely has elementary education resources and another is situated above the modal values of Portuguese society (specifically those who possess a secondary or higher education). This segmentation has repercussions on the socio-occupational performance of these people. Those with the highest education join the category of professionals and managers and, also, divide inclusion in the category of routine employees with other profiles, with lower qualifications. Those with the least education are mainly industrial workers (in this case with higher consumption levels than their socio-occupational peers with other life patterns). The life pattern of the established is also the one that, percentage-wise, registers the highest value in the socio-occupational category of entrepreneurs and executives (14%).

The *qualified*. This life pattern is by far the best endowed with educational and cultural resources. Around 60% have a higher education, markedly above the national average, which is also generally reflected in levels of socio-occupational integration that are relatively well positioned in the social structure. This is obvious in the proportion of those that are professionals and managers (85%). They also differ from the other life patterns in their qualitative

consumption, with all its implications and manifestations in the different areas of social, professional and family life. It is in this group that we find the highest occurrence of recreational, cultural, aesthetic, sports, technological and educational consumption and, from the assets point of view, supplementary possessions such as a second home or more than one car.

The geographical and demographic distribution of life patterns

As a complementary interpretation, the patterns identified are analysed on the basis of a set of socio-demographic and socio-spatial indicators. Not having been directly considered in the configuration of the topological space of the life patterns, they help to interpret, further, the social contexts that include these life patterns.

The *deprived*. Most of them are located away from the metropolitan areas of Oporto and Lisbon, with greater occurrence in rural areas than any other life pattern. Comparatively, it is a segment with a high proportion of old people living alone and of married or widowed women.

The *restricted*. They are characterised by a more or less homogeneous distribution among the various age groups. They are located essentially in urban or suburban areas throughout the country. With regard to their marital status, they mainly fall into the "married" category, with single people in second place, though a long way behind (an order that is maintained in the following life patterns, though with variable values).

The *massified*. With regard to their presence in the country, they show a very similar profile to that above. Demographically, they are younger and more concentrated in the groups aged up to 45 years. In proportional terms, this is the life pattern with the highest figures in the categories for married people and households with one or two children.¹¹

The *established*. They mainly live in urban areas, with a high presence in the Lisbon Metropolitan Area. They show a similar age-group profile to that above, if slightly younger. Though the married form a clear majority, in this case they do not register such a high percentage as with the massified. On the other hand, single people have a higher representation. In terms of the family, they are not very different from the life pattern above, though the proportion of couples with children is slightly lower.

The *qualified*. More than any other, this life pattern is the one in which the individuals most frequently live in urban areas (over 80%). From the age-group perspective, they are quite close to the massified and the established, though they have a slightly less youthful profile than these. Roughly

11 A characterisation of the life patterns of families with children was carried out by Susana da Cruz Martins (2004).

half of them live in the Lisbon Metropolitan Area and close to a quarter in the Oporto Metropolitan Area. In respect of marital status, as well as household structure, this life pattern is very close to the one above.

From a territorial viewpoint, these patterns show, in a different way, some of the trends that have been dominant in this field in Portugal in the last 40 years (Ferrão, 1996; Almeida, Costa and Machado, 1994; Machado and Costa, 1998; Almeida *et al.* 2000). In a country that is rural and elderly, there has been, in parallel, a marked expansion in the urban population, especially in the large metropolitan areas of Lisbon and Oporto. The deprived are those who are most affected by the processes of ageing. The qualified are those who are to be seen most in the processes of metropolitan concentration. Suburbanisation (often unplanned) has become an important residential context of the other life patterns, above all of the massified.

An analysis of the main family trends (Almeida *et al.*, 1998; Almeida, André and Lalanda, 2002; Wall, 2003), underlines the increase in households without or with few children, which is seen in all of these life patterns, with the highest rates among the restricted and the massified.

The configurations of social transversality and inequality in Europe

The life patterns indicated at a national level fit in with contemporary processes and transversal contexts of global interdependence. Next, we analyze a set of comparative European indicators precisely expressing contemporary processes that cut across the societies of the European Union.¹²

One of the most striking aspects is the inequalities between the population segment with the highest incomes and the segment, at the other end of the scale, with the lowest. Portugal is the country in the European Union that registers the greatest difference between the most affluent and the most deprived segments. With respect to the countries that made up the EU15, the income differences of their populations lie, in the ratio ascertained, between 3 and 5.¹³ The exceptions are Greece and, even more so, Portugal, which are shown to be more polarised in income distribution, with values of respectively 6 and 7 according to this ratio. In this international comparison (EU15), they show up as the most asymmetrical societies, at least on an economic level, and, similarly, as the most vulnerable to situations of poverty.

12 The statistical information used here for empirical reference purposes relates to comparative European data provided by Eurostat.

13 Eurostat, *Household Panel*, 1995-2003. The indicator "Income inequality" is calculated as follows: the ratio between the total income of the 20% of the population with the highest income levels and that of the 20% of the population with the lowest income levels.

Among the countries involved in the recent EU enlargement, Estonia and Latvia present elevated ratios of economic inequality, though they do not exceed the Portuguese data.¹⁴ In the balance between “winners” and “losers” (Fitoussi and Ronsavallon, 1997), Portugal registers social inequalities that threaten its social cohesiveness and, in the context of globalisation, are particularly serious for the still sizeable segment of low-skilled workers (Capucha, Bernardo and Castro, 2001; Capucha, 2005).

These social discrepancies show a convergence with the polarisation mentioned above between deprived and restricted life patterns, on the one hand, and established and qualified life patterns, on the other. With highly unequal incomes, these life patterns have associated different structures of social opportunity, which create sharp distinctions among them in their consumption and daily social practices, as well as in the socio-educational and socio-occupational resources that they can mobilise.

In European terms, too, it is revealing to take a comparative view of individual and family consumption. This is one of the key aspects of the concept of life patterns put forward here. But, in the sociological analyses of Portuguese social structures in a European context, it has been worked on less than the aspects of work and qualifications, for which a number of international comparative analyses are already available (Costa *et al.* 2000; Cabral, Vala and Freire, 2003; Mauritti, Martins and Costa, 2004).

The predominance of certain categories of goods in the total expenditure of European households may contribute to a general overview of the dominant life patterns in the European Union.¹⁵ In Greece, Spain and, above all, Portugal, the relative weight of food in daily consumption is significantly higher than the average for the EU15 (in Portugal it is a considerably greater proportion than in the European average of this group of countries). Social and economic realities demand a higher priority for the consumption of essential goods. However, among the EU states, there are various Eastern European or Mediterranean countries that equal or exceed the Portuguese level, e.g. Poland, Slovakia, Estonia, Latvia, Lithuania and Malta, with a high concentration of family expenditure on food consumption. On the other hand, accommodation and services associated with the household are expenses that represent a significant part of the consumption of individuals and families in northern European countries such as Sweden and Denmark. In this respect Portugal presents a considerably lower percentage than those countries (though this should be interpreted

14 Any interpretation of this indicator must consider the income levels and cost of living in each country, which differ quite a great deal among them, even in the European Union.

15 The selection of these categories was related to criteria regarding the composition of the types of life patterns and, also, their ability to distinguish the different European situations. Source: Eurostat, 2003 (for Austria, Latvia, Malta and Portugal: 2002).

with care, in the light of other indications pointing to a rise in these costs in recent years).

As far as health and education are concerned, the differences are not so visible, insofar as they are expressed through these family consumption indicators. It should be noted that, in these fields, the indicators present additional interpretation difficulties, especially in that they refer to areas that are particularly sensitive to the differences in welfare state systems in Europe, with their variability in the public coverage of health care and education services. However, on a purely illustrative basis, Greece has the greatest relative household expenditure on health while families in Luxembourg, the Czech Republic and the United Kingdom have the lowest direct expenditure in this area. Sweden, Luxembourg and Finland represent welfare states that are strong in the field of education, with very low percentages for direct expenditure on education by individuals and families. In Portugal, this percentage is highly accentuated, though greatly exceeded, for example, by Cyprus, the EU country in which, on average, families channel the highest expenditure to this area.¹⁶

With respect to culture and leisure-related consumption, the differences between countries are striking. Within the EU, Greece and Portugal are those whose family budgets are least directed towards these aspects of daily life. On the contrary, in others such as Sweden, the United Kingdom and Austria, the proportional significance of this expenditure in family budgets is considerably higher.

To sum up, Portuguese society reveals patterns of daily life that, today, incorporate many of the general traits characterising European life patterns as a whole. This transversality is not only to be seen in terms of configurations but, even more, of trends. With European societies as a whole Portuguese society specifically shares recognised trends in the expansion of educational and occupational qualifications, the general spread of the different forms of consumption and the development of some of them — despite the counter-examples and the contradictions that these dynamics harbour.

However, it is no less important to mention that, comparatively, in a European context, Portuguese society finds itself at less favourable levels of living and registers more highly accentuated levels of internal inequalities. Deprived and restricted life patterns tend to correspond to situations of greater need and include larger proportions of the population than most of their European equivalents (at least among EU15 countries). Although the modal life pattern, that of the massified, shares access to forms of social existence that are widespread today in developed societies, in this country it corresponds to

16 For an in-depth analysis of the most deprived populations in southern Europe and their relationship with the construction of the respective welfare states, see Maurizio Ferrera (2005) and, more specifically on the Portuguese situation, Luís Capucha (2005) and Luís Capucha *et al.* (2005).

less prosperous levels than the EU15 average (and, in some respects, the EU25 average), in terms of education, occupational qualifications and consumption. Here, also, established and qualified life patterns (especially the latter) seem to apply more distinctly to a minority than in most European societies.

Appendices

Appendix 10.1 Dimensions of analysis: goods and consumption practices

Initial dimensions	Final dimensions and categories	Indicators ¹
Food	Basic foodstuffs (bf) (5 consumption categories: 1=basic, 5=high)	Bread and other bakery products, flour, pasta and rice; Milk, eggs and butter; Tubers, onions and similar, mushrooms, vegetables and fresh fruit; Fresh, refrigerated or frozen fowl, sausages, dried, salted or smoked meat and edible offal; Pork and suckling pig, fish and derived products.
	Ready-made food (rmf) (6 consumption categories: 1=zero, 5=high)	Biscuits and cookies, pastry products, cereal-based food products and homogenised products for babies; Aperitif fruit, liqueurs and fortified wines; Mineral waters, natural fruit juice and yoghurt; Ready-made meals based on meat, fish and vegetables.
Housing	Housing (hsg) (5 consumption categories: 1=basic, 5=high)	House rents, services and maintenance; House decoration; Domestic utensils.
Clothing	Clothing and personal image (clpi) (6 consumption categories: 1=zero, 5=high)	Clothing, footwear and accessories; other personal care articles and products; hairdressing services and similar; trinkets and jewellery; Clothing repairs and rentals, textiles for clothing.
Health	Health (hea) (6 consumption categories: 1=zero, 6=high)	Pharmaceuticals and medicines, therapeutic equipment and material; Appointments and treatment involving medical, dental or paramedical services; Hospital expenses.
Transport	Personal transport (ptrp) (6 consumption categories: 1=zero, 6=high)	New cars and associated expenses; Expenditure on and maintenance of used cars; Acquisition of motorcycles and bicycles.
	Public transport (pbtr) (5 consumption categories: 1=zero, 5=high)	Urban and suburban rail, road, sea and river transport.

Initial dimensions	Final dimensions and categories	Indicators ¹
Holidays	Cultural practices (cul) (6 consumption categories: 1=zero, 6=high)	Books, newspapers, magazines and other periodicals, cinema, theatre and concerts; Stationery and articles for school: educational expenses; Sports and leisure services, expenditure on hotels, guesthouses and similar, tourist trips, museums, zoos and similar; Expenditure in restaurants and cafés.
Culture and leisure		

¹ The indicators are organised into items corresponding to the factors resulting from the first PCAs.

Appendice 10.2 Dimensions of the analysis: equipment and property belonging to the household

Initial dimensions	Final dimensions and categories	Indicators
Mass technologies	Standard technologies (stdt) 5 categories: 1=up to 3 pieces; 5=have all	Cooker, television, refrigerator, washing machine, telephone, freezer, sewing machine.
New home technologies (IT)	New technologies (ntl) 7 categories 1=none; 7=have all	Cell phone, photographic equipment, microwave, CD, computer (with or without internet connection), dishwasher, video camera.
Distinctive objects and conditions	Large supplementary possessions (lspo) 4 categories 1= none; 4=3 or more	Number of cars; number of garages; number of secondary residences.

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