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Class and Social Inequalities in Portugal:

From Class Structure to Working-Class Practices on the Shop Floor*

This paper addresses the emergence and development of class analysis in Portugal. Starting with a reference to the process of institutionalising sociology, I will discuss the influence of different schools of thought in the light of the political context, i.e. the 1970s, in which social class theories and Portuguese sociology itself were born. I will refer to different theoretical and methodological perspectives, and, in particular, discuss the interconnections between quantitative and qualitative approaches, while emphasising the advantages of the latter. These will be illustrated with examples of my own research based on the participant observation method, showing some aspects of daily life on the shop floor where I worked. Finally, I will propose some new lines and prospects for future developments in research into social inequality.

Class analysis in portuguese sociology

Sociology has only been able to develop fully in Portugal since the triumph of democracy with the Revolution of the Carnations (April 25, 1974), but it would be wrong to say that only after that did we have Portuguese sociologists. As we all know, during the 1960s, in European universities sociological thinking was strongly influenced by the new social movements. During this time, the authoritarian regime of Salazar in our country not only gave rise to huge class inequalities, but also made it impossible for them to be studied sociologically. Sociology was then considered a synonym for socialism. However, many young students, who left their country during this period to escape both the decaying and repressive regime and conscription into the colonial war, studied in Europe (mostly in

* The present text has been previously published in the book edited by Fiona Devine and Mary Watters (2004), *Social Inequalities in Comparative Perspective*. Oxford, UK/ Malden, USA: Blackwell (141-162).

France) and thus came into contact with the debates in the social sciences. This would later be of great importance to the academic institutionalisation of Portuguese sociology.

The foundations of Portuguese social sciences, together with class analysis, were laid by a small group of researchers led by Adérito Sedas Nunes.¹ His first sociological text (Nunes, 1964), covered the theme of the dual society, and drew attention not only to the general poverty of the country but also to the stark contrast that characterised the increasing gulf between the urban centres (Lisbon and, partly, also Porto), which absorbed almost all the professionals, and the country as a whole, which was still predominantly rural and under-resourced.

Studies which followed, on higher education and the recomposition of the labour force (Nunes, 1968; Guerra and Nunes, 1969; Miranda, 1969) provided an important critical diagnosis of the “backwardness” of Portuguese society during the period and denounced the elitist nature of the universities. The class origin of students was presented as a clear inversion of the stratification pyramid. The texts published in *Análise Social (Social Analysis)*² interpreted this underdevelopment as the result of an autocratic and coercive regime, designed to guarantee the security and reproduction of the dominant classes (Nunes and Miranda, 1969).

While the so-called “Sedas Nunes group” started pivotal work in the country, in the late 1960s in Britain H. Martins³ had also begun an interesting set of essays on Portuguese society. The central aspects of these studies focused on issues such as European fascism and the nature of the *Estado Novo* (the New State), in which he discussed some of the classic Weberian concepts and tried to use them to understand our society during the late phase of Salazar's regime. It was a society considered “culturally homogeneous” and subjected to a class dictatorship, as distinct from the so-called apparatus dictatorship, and characterised by its coastal basis, the fragility of the middle-class strata and the “dualism” between rural and “modern” trends (Martins, 1998).

¹ A professor of Economics who had connections with democratic Church movements, via the circles of progressive Catholicism. He dedicated his work to a study of corporatism within a State institution, thereby becoming introduced to the major contemporary sociological writers. In 1963 he was authorized to establish the Gabinete de Investigações Sociais (Bureau for Social Research) and the journal *Análise Social (Social Analysis)*, and thus became the founder of Portuguese sociology.

² Particularly during the period 1968-72, known as the *Primavera marcelista* (the Marcellist Spring), when Salazar left office and was replaced by Marcello Caetano and there were some signs of greater political openness and relaxation of censorship.

³ Living in England at the time, he became a professor at Leeds University.

Both these contributions played an important role in shaping future studies on class inequality in Portugal within the first generation of our sociologists. Therefore, it can be said that the first approaches to social inequality in Portugal combined stratification theories and structural class analysis. In the early 1970s a few texts were published on mobility, paying particular attention to the importance of social and personal trajectories – including, for example, notions of “expectations of mobility,” “anticipated socialisation” and “reference groups,” and to the symbolic significance of “upward” or “downward” agent mobility (Almeida, 1970).

It is worth remembering at this point that the context in which sociology developed in Portugal not only favoured attention to class issues and social inequalities, but, since it coincided with the late institutionalisation of democracy, was clearly framed by the revolutionary social climate (1974-5), within which class language played a leading role (Estanque, 1999). This explains the strong presence of Marxism within sociology and was woven into abstract debates that revolved around the concept of social class.

From the mid-1980s onwards, class analysis witnessed greater development and conceptual elaboration through the work of the ISCTE⁴ sociology group. Stressing the multidimensional nature of the concept of class, the authors developed their own typology of classes, combining the models of Poulantzas (1974), Wright (1978, 1985) and Bourdieu (1979) in strict articulation with multiple theoretical influences, to produce a rigorous model of class typologies which contributed significantly towards shaping class analysis in Portugal (Marques and Bairrada, 1982; Ferrão, 1985; Almeida, 1986; Costa *et al.*, 1990). The starting point was the study by João Ferreira de Almeida (1986), in which the author used a wide range of theoretical and methodological tools in order to overcome the “structuralist straitjacket,” on the one hand, and “individualist idealism” on the other (Almeida, 1986: 86). This critical revision of functionalist sociology led him to a sociological explanation of the way in which the recomposition of classes was processed in a rural context (north of Porto city), characterised by flows of daily migration, with part-time rural workers and local family networks acting as a “reserve labour force” within a peripheral community exposed to the structuring effects of the industrial nucleus of the city of Porto.

⁴ The Institute for Higher Education, Business and Administration, University of Lisbon. The team consisted of João Ferreira de Almeida, António Firmino da Costa, Fernando Luís Machado and José Luís Casanova.

In analyzing recomposition and social mobility in Portugal the same authors portrayed the evolution of the class structure from the 1960s onwards, discussing the results of “social mobility” in the light of the deep structural change that was occurring in the country. This includes the huge expansion in the education system (together with its markedly female presence), mirrored in the tertiary sector workforce. In addition, intergenerational social mobility not only showed downward and upward trends (with the latter more significant than the former) but, at the same time, a marked tendency towards social reproduction or “immobility,” which is particularly evident in the most extreme categories of the class structure (Almeida *et al.*, 1994; Machado and Costa, 1998).

The presence of the structuralist approach brought together concepts such as “class trajectories,” “family networks,” and “lifestyles,” which helped to direct analysis towards the role of social actors in the cultural field. The influence of Bourdieu was significant among the new generation of Portuguese sociologists, particularly his conception of a class structure intertwined and reproduced through the individual and class *habitus*, that is, through the incorporation of cognitive systems of classification and practices. The attention given to cultural lifestyles, as well as to aspects such as symbolic consumption, the social construction of taste, the building of social schemes of distinction and imitation etc., have been important and innovative dimensions for studies in class inequality.

The most recent approaches to social class and mobility have progressively abandoned the structural approach, since the old abstract analyses have given way to more subjective or culturalist studies. Doubtless it is not by chance that these new trends seem to be moving from Marxism towards the Weberian vision, as a prerequisite for focusing more closely on political and subjective elements (Erikson *et al.*, 1993). Recent studies have set the tone for Portuguese perspectives on inequality and self-identification of class, seeking explanations for the lack of citizenship and equity in Portuguese society (Cabral, 1997; forthcoming). This research has confirmed the restricted dimensions of the middle classes and little empirical evidence of upward mobility. In terms of subjective attitudes, a widespread feeling of injustice in the distribution of wealth, together with a sense of being impotent to change the direction of events are prevalent traits in Portuguese society today. The Portuguese seem to share greater subjective feelings towards wide levels of power distance (Hofstede, 1980) between the strata immediately above or below them, but – paradoxically or not – they tend to identify themselves with the “middle class” (sometimes, even when they are in fact manual workers). In this respect the field of consumption might be considered a central element, since it gives the lower and middle classes the impression

of gaining access to life styles viewed as similar to those of the strata immediately above them.

In a recent study on the working-class district of Alfama in Lisbon, A. Firmino da Costa (1999) provides a good example of how class analysis can be enriched by multidimensional perspectives and plural theoretical concepts. The structure-agency dilemma, for example, is embedded in the effort to forge new links between different levels of analysis (macro-meso-micro) and this is directed towards an understanding of the practices, networks, and patterns of identities and cultures in which the actors move. This is, in fact, a demonstration of how an approach to class inequality can create a more consistent understanding of interaction contexts, that is, the spaces within which identities are structured, given that these contexts obey and interact with socio-economic structural conditionings. These conditionings, far from being imposed or “determined” on a macro-level, are first incorporated by the agents into their representations, subjectivities, and practices, and it is in this way that they participate in the restructuring of inequalities, both cultural and social, and in the production of the Alfama society.⁵ The crucial importance of understanding the cultural traditions and associative practices in this urban community of Lisbon has been sustained as a condition for preserving local identity and its popular roots. Through case studies like this, the full potential of action-research programs becomes clear. Proximity and involvement with the social actors have been decisive factors in defining forms of action and of negotiation to minimise the risk of gentrification and to revitalise this traditional environment through urban redevelopment policies.

We have seen how Portuguese sociology was born under the direct influence of class analysis and how the structuralist approach was strong, especially during the second half of the 1970s, notwithstanding the plurality of theoretical influences, including social stratification. But, in spite of the growing importance of the culturalist approach, I believe there is a risk of a split between the ethnographic perspective and socio-economic class analysis. So, as previously mentioned, qualitative case studies may deal with the structural dimension by trying to connect the social interaction under observation with the macro frameworks within which collective action takes place.

⁵ Alfama is a very well known historical area in the city of Lisbon, located between the St. George castle and the Tagus River.

Qualitative methods and participant observation

The problem of qualitative versus quantitative methods in the social sciences is linked to the wider issue of epistemology and the history of science. When we look back to the late nineteenth century it can be said that theoretical controversies within universities and amongst sociologists were always influenced by the impact of workers' struggles (AAVV, 1996). This kind of permeability between theoretical conceptions and social struggles and between the social sciences and the “real world” is the main reason why theoretical divergence persists. Just as we cannot ignore the large amount of theory accumulated over more than 150 years, equally we cannot ignore the fact that the social world has changed profoundly and some of the old perspectives are no longer capable of explaining new trends.

In fact, the difficulties involved in reconciling a critical sense of analysis with the rigor and complexity of the quantitative methodology employed did not abate (Wright, 1985, 1989). The efforts of analytical Marxism to confer greater scientific legitimacy on class analysis continued at the expense of concessions to the positivist principles of methodological individualism (Burawoy, 1989; Pakulsky and Waters, 1996). In addition, the most stimulating dimensions of Wright's work moved significantly closer to Weberianism, thus lending credibility to those who claimed that “class consciousness” could not be understood through abstract determinisms. We may agree that *Class Counts* (Wright, 1997), but this becomes a mere nostalgic cliché if the question of class does not incorporate or connect with other forms of inequality emerging in society which are difficult to capture with the old class schemes or quantitative instruments. In my opinion, it is therefore fundamental that an analysis of these questions makes use of various methodologies, in particular qualitative methodologies and case studies (Reay, 1998; Grusky and Sorenson, 1998).

In a study I conducted into the footwear industry in Portugal, I used the participant observation method to address questions such as class practices, group subjectivities, and identity structuring (Estanque, 2000). The company where I worked employed about 60 workers and was located in S. João da Madeira (SJM), on the northern coast of Portugal, north of the Aveiro district. During this period I worked an 8-hour day on the assembly line and shared many of the workers' experiences, not only inside the company but also during leisure and free time activities.

I believe the option for this methodological approach requires a very strong break with positivist science. The classic epistemological assumption that ordinary people live in a world of “illusion” – the Durkheimian belief that common sense is guided by “illusions” and distorted impressions while the scientist represents reason – must be challenged, since no understanding can be completely neutral. The search for objectivity is not synonymous with absolute neutrality (Santos, 1995). For participant observation to be used successfully, it is essential not to neglect the self-reflexive critique which the problem of interaction between the observer and the observed demands (Bourdieu, 1996; Fowler, 1996).

The methodological strategy I followed corresponded to the so-called extended case method⁶ and was dedicated to avoiding determinism and relativism, by establishing a multiple interactive causality which aimed to intersect the micro-foundations of macrosociology with the macro-foundations of microsociology (Collins, 1981; Fine, 1991). Observing the phenomena from below, but still paying attention to the external forces which model them, and through a form of experimental fieldwork in social involvement with individuals with whom I shared work routines, physical labour, jokes and many complicities over three months – this is the method of checking pre-existing theories, hypotheses and sociological knowledge directed towards a wider social context (Burawoy, 1991).

Participant observation implies, of course, an infinite number of risks and problems. Although there are advantages to experimentation in terms of the overall depth of the study, it also raises innumerable perplexing issues, since, in spite of previous knowledge of the field and because this knowledge is fundamentally either theoretical or superficial, the researcher is soon led to feel let down by his expectations. This situation forces us to question the power of the social scientist and to pay more attention to alternative points of view, namely those of the actors being observed. Obviously it is a complex task and one that can never be fully achieved, given that, even knowing that social practices are always practical knowledge, “they can only be recognised as such to the extent that they are the mirror image of scientific knowledge” (Santos, 2001: 266).

Let me describe briefly my experience in the factory. The cultural bias of my own class condition made me feel inadequacy, discomfort, and misunderstanding, especially at the outset when the workers viewed me with distrust, if not as an outright “enemy.” In my personal case, if I had had any doubts at all, this fact alone would have constituted direct

evidence of the symbolic force of a class rift. At first, there was immense speculation among the factory workers about my presence there, since the absence of a strong pair of callused hands, as much as the way in which the line supervisor (who knew of my status) addressed me, made them sense immediately that “he isn't one of us.” Some insisted that I was a “psychologist” working for the boss, others were sure that I was from the police and was tracking down a gang of drug dealers, and yet another group insisted that I was a member of the boss's family who was learning about factory procedures. My strategy was ruled by discretion and I aimed not to draw attention to myself, although at the same time I needed to gain their confidence. So, little by little, as I began to make friends, I told them vaguely that I was trying to “study the footwear sector.”

After three weeks of hard work, standing for eight hours a day to carry out various tasks, my fingers were swollen from undoing boots manually at dizzying speeds. I considered giving up because, in addition to physical exhaustion, the workers, contrary to my expectations, showed no interest in talking about the company, the union or the working conditions (the issues which at the time seemed most important to me), even after they had begun to trust that I was on their side. I resisted, with difficulty. I reflected painstakingly and, after many theoretical dilemmas and much existential anguish, began to incorporate the significance of the workers' deliberate evasion of their problems with the company, and even with myself, into the analysis. The volume of sympathy and information I received and my “privileged” position towards the various actors (the director, supervisors and workers) conferred a special status upon me, which I attempted to benefit from as much as possible. I began to pay more attention to the little symbolic power games of daily life and I did as much as I could to understand how these processes, made up of tacit agreements, significant silences or latent resistance, were constructed by the workforce.

Nevertheless, many questions remained unanswered, although the fact that they had been formulated was fundamental. Indeed, I believe sociological research cannot provide all the answers, and so the questions that emerge during the observation process must be shared. They should even be published whenever possible. For this reason, in the book which was subsequently published, I left fragments of my *Diário de Campo (Fieldwork Diary)* printed on alternate pages of the chapter in which I analysed the relations *in production* (Burawoy, 1985), thus creating a mirror effect (cf. Estanque, 2000: 243-321).

⁶ Developed and employed in many field studies, including Boaventura Sousa Santos (1983 and 1995) and Michael Burawoy (1979, 1985, 1991).

The results of my research were the object of some public discussion, ably promoted by the local press, in which workers and unionists in the sector participated. Because of this, I also had to face a violent reaction from my “ex-boss” in which he afterwards accused me of treason, ingratitude and even of being involved in a “set-up” with the trade union leaders. I should add that, in the beginning, I made a deal with the owner of the company in which I agreed to write a “diagnostic report” before leaving the factory, which I have done. The overall information delivered in that report identified several communication and functional problems within the firm, but never identified individuals. I now believe his intentions were different. The fact that he expected to obtain detailed information about the “motivation of the workers,” together with the use he made of my presence – a sociologist studying his company – to promote an image of a modern entrepreneur, help to explain his co-operation with my research but also his disappointment in the end. I think this is a good illustration of the multiple power games involving the researcher in a case study like this.

The analytic importance of participant observation only becomes relevant when its results are integrated into a wider theoretical framework. This confirms that, in reality, methodologies cannot be considered separately from the analytical perspective as a whole. In this particular case, I had attempted to pursue the study within the historical process of local industrialisation and its spatial and socio-cultural impacts. This effort not only enabled the qualitative study to be combined with an extensive survey of the regional class structure,⁷ but also required an analysis of cultural identity within the company and in the surrounding community, as different dimensions involved in the making of the local working class.

In this second section I have briefly discussed qualitative methods, focusing on my fieldwork in order to show the advantages and complexities of participant observation. I have given some examples of the daily life on the shop floor and referred to the efforts made to link observations of the working class from the bottom up with the structural framework and historical background.

⁷ I applied the survey to two different samples, one at a national level and the other at a regional level.

Class inequalities and contextual analysis: A case study of the shop floor

I will start this topic by summarising some results of my former research on social classes, and then I will give some detailed attention to my case study on the working class in the footwear industry. The study of social classes in Portugal which I undertook a few years ago (Estanque *et al.*, 1998) was based on a Marxist theoretical model and aimed for a systematic understanding of the class structure based on a critical view of social inequality and its dynamics. It allows us to see both the overall configurations of the Portuguese class structure and in particular the complex divisions among employees, which I believe has been an interesting contribution (Wright, 1985). However, this is a mere abstract model, the Wrightian topologic model of class locations, designed to characterise the class structure. It refers to classes on paper and not classes in action. For that reason I tried to interpret the results from the Weberian perspective paying special attention to historic and contextual aspects (Wright, 1997).

For example, the statistical weight of the “petty bourgeois” owners (22.6 percent) and, principally, of the “proletarian” class category (46.5 percent) together with the low rates for middle class positions (14.5 percent)⁸ clearly revealed the deep contradictions present in Portuguese society (Estanque *et al.*, 1998). Still an eminently rural society in the early 1970s, the country suffered a very intense process of social change in just two decades. The large number of “proletarians” is a result, on the one hand, of the rapid industrial restructuring and privatisation processes in the early 1980s and, on the other, of increased flexibility and fragmentation in the job market.

When we compare the national results with those of the region referred to in the previous section (SJM), the contrasts between the different class fractions widen dramatically. Here, middle-class categories, already barely represented at national level, practically disappear. The most highly qualified positions in the workforce waver between 0.3 percent and 0.7 percent, while the proletarian category rises substantially to 60.2 percent. The entrepreneurial framework, composed primarily of micro-companies whose owners are almost entirely former workers, is always turbulent. Very high flows of individual mobility combine with high levels of class reproduction. The regional class structure remains virtually unchanged over two generations (Estanque, 2000). Furthermore, the regional working class has shown very low levels of involvement in protests and associative participation. Many workers even declare themselves to be relatively optimistic

⁸ Using Wright's terminology, I should say, instead, contradictory class locations.

about their future. The ideological effect of an illusion of affluence functions alongside the relative affluence of some segments of the labour force, leading to positive expectations on an individual level. How can these contradictions be explained? What is the significance of class in a context such as this?

The experience of working-class resistance to capitalist exploitation also took place in this region, but it has always been shaped by a community and family-based paternalism which is typical of the artisan tradition. The impact of industrialisation instigated a regulatory logic with specific characteristics, within which class capacities were redefined between resistance and adaptation to the community context. When, in the early decades of the twentieth century, a strong movement to promote a modernist community in S. João da Madeira emerged (led by the emerging capitalist class), it aimed to be based on “local pride” and founded in the productive ideal. The word “LABOUR,” which is still displayed today on the local county flag, embodies the symbolic triumph of the official discourse in its historic and cultural struggle against the class language inscribed in the experiences of the working-class movement during the same period.⁹

As we know, the community cannot be viewed in a purely territorial or substantive sense (Ferrara, 1997). It is, above all, a dynamic socio-cultural process, which produces collective subjectivities and witnesses many struggles, discourses, and forms of identification. If class is essential in structuring economic inequality, it is also decisive as a discursive or identifying element. In both cases it is inscribed within the community; it becomes part of the culture and takes part in the struggle for recognition and the collective dignity of a segment of society: the industrial working class (Fraser, 1997; Honneth, 1996).

When I analysed everyday life on the shop floor more closely, several perplexities emerged. In a working-class sector like this, which earns some of the lowest wages in the EU, collective struggle scarcely exists and trade union involvement is very low (even though affiliation rates are above average, at around 35 percent). Contrary to what might be expected, there is no approval by the workers for management policies. What prevails is tacit resistance, a covert rebellion, which signifies the existence of a wide rift in culture and identity between the collective workforce and the company hierarchy. As previously mentioned, the factory workers demanded a clear statement of my position, “one of them

⁹ It has been noted that, following the triumph of the Salazar fascist regime in 1926, this local neighbourhood movement became the target for powerful ideological manipulation by the *Estado Novo*, supported by disciplinary policies to control the workers' free time activities, which further contributed towards emphasizing the construction of an adaptable community.

or one of us,” which reflects the antagonistic way in which they perceive interests within the factory. Yet although I seemed to be in the presence of a clearly visible class instinct, the workers did not openly contest the bosses and viewed the role of the unions with a certain mistrust. The game playing that was always breaking out during production in the form of petty sabotage and petty outbursts against the system seems to function as a form of escape from a constraining discipline and an unwanted exploitation (Collinson, 1992). The subtle tactics and transgressive behaviour of the workers (de Certeau, 1984)¹⁰ express a working-class identity on the shop floor as a collective response to defending dignity under assault. Yet, at the same time, these small symbolic power games ultimately serve to fuel the manufacturing of consent (Burawoy, 1979).

The assembly line supervisor told me some revealing stories. He complained that the workers always tried to do things their own way and said that some of them were trying to “make my life a misery ... and test me out to see how soft I was. And the more they felt I was soft on them, the more they took advantage ... sometimes I pretended not to notice but I understood what was going on all right!” When I asked him why he shouted at the workers from a distance when they were, as he put it, “filing their nails” (meaning that they were chatting or slacking), he gave me the following explanation: “before, I used to go up to them and point out what they were doing and control things. But I began to realise that they just wanted to give me the run-around. When I went up to someone who was talking or fooling around, they understood and so the others behind me would call me over to sort something out as well.”

Still, F.'s arrogant shouts were much more in evidence when the boss was around and were usually directed at the youngest and least qualified workers. Resistance varied according to individual cases and could involve more dramatic reactions or more subtle kinds of games. *Uncle António* (a 60-year-old who worked alongside me) would sometimes yell in desperation to the supervisor when the belt was running too fast, but never straight to his face and not when he was nearby: “Can't he see he can't do this? Any minute now, I'm going to walk out of here!”

On other occasions they adopted a deliberate *laissez-faire* attitude if they saw that the supervisor was not paying attention to the excessive speed of the belt. Since they knew that they couldn't win by protesting openly, and yet at the same time did not want to

¹⁰ This transgressive activity is also present at a cultural and community level, when the local history of the construction of the popular culture and leisure activities of the working class in the region are analysed (Estanque, 1995).

cooperate, they deliberately slowed down and remained calm, as if whistling to themselves, pretending not to understand what was going on. It was a silent revolt, noticeable in attitudes of non-cooperation and mockery designed to counteract the “airs” and the authoritarian attitude of the supervisor, whose technical competence was, in the eyes of the workers, dubious, to say the least. The delight with which they related situations such as the following was symptomatic: a shoe had a slight fault so the boss asked one of the workers to “fix it” and he said, “Leave it here, then.” A little while later the supervisor came back to check and was shown the same shoe which was supposed to have been repaired but in fact had not been touched and he said, “That's good, put it back on the belt and send it on.” They laughed a lot at him behind his back and took great delight in doing so. These were just fleeting moments of fun in a daily routine marked by the extreme pressures of discipline and physical and psychological exhaustion. Yet they served as important escape and compensation mechanisms. In this way, it may be said that consent, being both partial and composed of countless moments of camouflaged dissent, was the result of a social process in which all parties were, in one way or another, implicated.

Of course, this connection between the structuring of class inequality and the cultural dimension is also created by other means. The way in which women, for example, take part in the power games within the company is clearly illustrative of gender-based class relations. It should be remembered that more than 60 percent of the workers in the footwear industry are women. In a segment of society such as this, characterized by low levels of education, economic poverty, and close connections to the rural world, the behaviour of the female workforce clearly reflects the secondary status of women and the types of discrimination they are subjected to. My observations confirmed, on an almost daily basis, the discriminatory way in which the authoritarian behaviour of the supervisor was always more violent when directed towards the young female workers. Sometimes a manufacturing fault was a reason for punishment and “sending them out” for a certain time (which, obviously, was deducted from the wages, at the minimum rate of half an hour, even if the period spent outside was less), a punishment preceded by the inevitable public reprimand. The humiliation was so great that it usually resulted in tears. The sexist games in which the girls were always involved also clearly revealed their status as “sex objects,” in which they often colluded. In addition to discrimination in terms of wages, there are countless cases of sexual harassment, restrictions on visits to the WC, arbitrary dismissal of pregnant women and, sometimes, physical violence. As I said before, this is a sector in

which women form the majority of workers, but that does nothing to create an equivalent distribution of managerial positions: almost all the supervisors are men. The factory is a world defined by virility and this is reflected in the relations of production, even though the women themselves play an active part in reproducing this masculine logic. The fact that the female workforce is composed predominantly of youngsters with few educational assets, who are more dependent on the family and more docile, at least in this cultural context and class condition, in the face of both capitalist and male power, leads me to the conclusion that the female majority not only reflects gender segregation but also contributes towards accentuating conformism and the reproduction of class inequality.

What I aimed to show in this study, through the vision of M. Burawoy (1979, 1985, 1991), was precisely the way in which the working class, through the informal practices of everyday production, contributed actively towards legitimising rules which had been instituted and obscuring certain elements of the production process, namely exploitation. The hegemonic despotism exercised over the working class is, in this context, directly linked to local paternalism, which results from the ambivalent relations between industry and the community. This is in part due to ties of loyalty, personal affinities, and family networks being transported from the community to inside the company, leading bosses (mainly in the small companies) to believe that their employees feel a kind of debt of gratitude towards them that can never be repaid. When workers take part in a strike or become involved with the trade union, this is seen by the employers as an act of treason.

In addition, the permeability between the company and the community is also evident in the fact that many bosses tend to use the personal connections they have in the community to control, from their positions of authority, certain aspects of the workers' family lives. As SJM is a small community, it easily offers forms of social control which, with due discretion, allow the boss access to aspects of his subordinates' private life and enables him to seek in them the reasons for any behaviour considered "strange" or "abnormal." For example, in the company where I worked, a lack of dedication or punctuality in a worker could justify the fact that, in his own interests – and those of the company too, naturally! – the management paid special attention to these situations.

This context proves, therefore, the interdependence of a class logic which reproduces inequalities and a cultural dynamic that, paradoxically, fuels it while resisting it. The increasing globalisation of markets has brought about in this region a contradiction between the hegemonic pressures of the global economy and local forms of action seeking

to resist it. Since this is an industrial sector which is directly dependent on global markets (around 80 percent of production is destined for export), this situation creates new difficulties but, at the same time, opens up new horizons for working-class organisational structures within the footwear industry. In spite of the aforementioned difficulties in mobilisation, the union has played an extremely important part in the search for new forms of intervention and emancipatory action. According to the trade union leader, the strategy is now to resist capitalist power in the industry through cultural movements within the local community, while at the same time taking part in transnational movements to resist global capitalism. In addition, the old language of Marxist orthodoxy has given way to a pragmatic sense of action, in which dialogue and radicalism are combined and practicalities exist alongside utopian reinvention. This may mean that, in political terms, class action can only be activated when it is aligned to other social movements and actors.

In this section I began by identifying some of my most recent research relating to the theme of social class in Portugal and I attempted to focus reflection on the case study in which I made use of participant observation. I then presented a series of examples and discussed some aspects of the social dynamics observed in the daily life of the factory where I was a manual worker. Situations involving humour and informal power games were used to illustrate the socio-cultural complexity of this segment of the working class, in which relationships of dependency, as well as micro-rupture, consent, and rebellion, combine in a framework of domination characterized by despotic paternalism, and in which class inequalities are reproduced on the basis of the close connections between the factory and the community.

New research lines on class and other inequalities

The challenges faced by class analysis are, of course, connected to the wider changes emerging in global society. Issues of economic inequality, poverty, and ethnic, sexual and cultural differences are now taking on a new shape and, in my opinion, all of them are, in one way or another, related to the class problem. In a world increasingly defined by mobility and the breakdown of national frontiers, the neoliberal discourse of new opportunities, empowerment and competition go together with both old and new situations of oppression, exploitation and exclusion. As all international institutions recognise, inequality is increasing day by day and there are no glimpses of any credible measures on the horizon that can halt this process. What can class analysis contribute

towards a consideration of these problems? From among the vast array of possible lines of investigation, I would like to focus on two areas which appear to me to be crucial for the times ahead, from the perspective of Portuguese society.

The first is related to education as a channel of mobility affecting the restructuring of classes, as well as gender inequalities (Crompton and Mann, 1986). The impact of educational policies and the so-called knowledge society on class structure is full of contradictions. The opening up of the education system to the working classes, in addition to offering new opportunities, has also created typically middle-class values and subjective expectations, reference groups, and lifestyles. Moreover, current information technology is producing new divisions, not only among the qualified and unqualified sectors, the new “info-excluded,” but also in the very process of converting and reshaping professions. Those who had previously held qualified posts in the services sector and whose professions had entered into decline, nowadays face rising instability, in addition to a loss of status (Esping-Andersen, 1993).

In Portugal the position of women in education and in the employment market presents interesting paths for studying social class. The greater success rate of women in education, as well as their increasing presence in qualified jobs, is already well known. Although the top jobs remain in the hands of men, Portuguese universities today contain the highest number of women in Europe and levels of academic success also remain much higher for girls than for boys. At a time in which educational qualifications are becoming the main factor in career promotion, in the face of this apparent female hegemony in the universities (of around 60 percent), can we expect that there will be a repositioning of women in the stratification structure in the next ten years? What repercussions will this have on the recomposition of social classes?

There would have to be more systematic and up-to-date research into this phenomenon in order to assess its real sociological significance. However, it is worth remembering that the family structure in Portugal remains a core variable in these types of studies. Although strong patriarchal values remain inscribed in the division of domestic tasks, if this patriarchal tendency is considered in the light of the symbolic significance of educational status within the family, we may conclude that, in fact, it favours women. That is to say that, in spite of the rising attraction of higher education qualifications to the

working classes,¹¹ their low economic means do not permit families to put all their children through university. In such situations, the girls are chosen, since patriarchal logic demands that the boys make an early start in working life, thus reserving the opportunity to continue studying for the girls.

The second area, which I believe will be particularly important in the near future, relates to changes in the employment market and their implications for the recomposition of classes. Here, class and ethnicity must be connected. It is clear that the instability and fluidity which nowadays characterise employment, whether in the service sector or in the productive industries, are leading to the expansion of segments which Esping-Andersen has termed the stand-by classes (1993: 234). Yet, in the current global economy, post-Fordist systems are also consolidating processes for transferring investments and moving labour forces that are profoundly altering the entire class structure. Increasing international mobility, above all at the top and base of the stratification pyramid, requires a more systematic study, especially in its European context. Nevertheless, it is possible, by starting from the Portuguese situation, to outline some hypotheses for a sociological interpretation of these types of phenomena.

Portugal's position in the past 15 years has changed from that of a country of emigrants to a country of immigrants, and it has now assumed an important position as an entry point to Europe for African and Latin American migrants (mainly from the former Portuguese colonies such as Cape Verde, Angola, Guinea-Bissau, and Brazil). Although debates on ethnicity and class are not recent, new areas of enquiry are emerging within the current framework of intensifying transnational flows, suggesting new lines of research. The emergence of overclasses and underclasses on a transnational scale is an area which merits further study within the context of an enlarged Europe. The increasing transfer of the clandestine workforce to the EU countries makes the problems of the underclass, racism, and social exclusion more visible.

In the case of Portugal, with the arrival of significant numbers of workers from Eastern European countries (particularly Ukrainians, Moldavians and Romanians) and their rapid absorption into precarious and badly paid jobs, these problems have become very evident. In the construction sector, for example, which employs a large proportion of immigrants from Africa, it can already be seen that there is a difference in the distribution

¹¹ At Coimbra University, for example, about 40 percent of the students are of working-class origin (Estanque and Nunes, 2002)

of professional tasks between these two groups. The East Europeans tend to assume positions of higher responsibility more quickly and also are better paid, in comparison with the Africans. Parallel to this, after the recent policies to authorise residence for these workers, a union-style association has already been established for East European workers. While the Cape-Verdians usually remain in more precarious employment situations and tend to live in more closed communities (often the reason for racial segregation and accusations of urban violence), the new emigrants from the Eastern countries find it easier to integrate, whether in companies or, for example, in the type of domestic work (such as daily or company cleaning staff) which is beginning to absorb many newly-arrived Ukrainian women.

It is impossible to know to what extent these phenomena are transitory or how deep a structuring effect they will have on the recomposition of classes. But, no doubt, they do show that ethnic and identity differences in this new context bring new complexities to class inequalities. Racial prejudice seems to be more decisive here than language difference, since, in spite of speaking Portuguese, the Africans are dispatched to the ghettos and resist integration while the Ukrainians and Moldavians integrate better, although they do not speak Portuguese. The wounds of post-colonialism, on the one hand, and questions of religion and colour, on the other, are, without doubt, factors that must be taken into account. It is known that the construction of racism has always been connected with class (Balibar, 1991), but it will be important to investigate exactly how this connects with class and collective action in present times. The fact that black workers are oppressed and socially excluded cannot, of course, be separated from the conditions of hyper-exploitation to which they are subjected at work. Furthermore, the fact that Eastern European workers have won better positions in the employment market is inseparable from the similarities of colour and culture they share with the Portuguese. It should be added that they are better trained and have higher levels of education, which is, of course, a very relevant advantage.

If, in the future, the associations promoted by the Luso-Africans manage to establish alliances with the Eastern European immigrants within the context of work, it will be possible to consider a new “class struggle” of the displaced proletariat of the twenty-first century. It will certainly be difficult for the new struggles and movements to be simply “about class.” This struggle, if it expands, as one can expect, must be articulated together with a whole set of NGOs, anti-hegemonic movements and associations formed to combat poverty, exclusion, racism, etc.

In conclusion, it may be said that Weberian and Marxist-inspired class analyses will continue to draw closer together in search of the reciprocal enrichment necessary for the analysis of many of the problems emerging today. The theme of inequality, far from becoming irrelevant, seems to have assumed a new central focus. The rising injustices in the contemporary world demand that critical approaches be revitalised in order to grasp the growing complexities. If the social sciences in general cannot ignore the turbulence and social conflict which surrounds us all, class analysis in particular must not only look at inequalities and social differences, but also at the actors and the social and political movements which lead the struggles against these inequalities and differences today.

It is certain that the development of new lines of analysis relating to these themes will require the use of appropriate research skills. Qualitative methods will also continue to be essential in studying their true sociological scope. The way we observe spatial contexts within which social life is restructured, even when this process results in much broader structural effects, is undoubtedly a decisive factor in penetrating the real world and understanding the pulse of society. I am convinced that understanding the rising complexity of social change, which affects us today, requires redoubling our attention to the orientation of subjects, their representations and interactions in practical life where identities and inequalities are constantly being rewritten, propelled or inhibited by collective action.

Even in a global society in which mobility and flux of all kinds are defining new features, the impact of globalisation only has meaning because it affects concrete people, groups or social sectors. The counterpart to globalisation is localisation. Giving priority to qualitative methodology means, in my opinion, giving priority to a critical approach to society and its problems and also to a critical vision of sociology itself. Direct observation and participant observation of micro-spaces and micro-realities require proximity to concrete groups and the sharing of their lives and problems. It means doing this there, in the place where they live. Obviously this is one methodological option among others. But it is an option that will not be content with an aseptic interpretation of reality, preferring instead to construct a citizen-science not simply limited to identifying exclusion and inequality but able to contribute towards discovering possible paths towards inclusion and social justice.

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