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ECONOMIC SOCIOLOGY IN PORTUGAL

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In this article, we look at the constitution of the field of economic sociology in Portugal. First, we consider the institutional framework of the field, reviewing the research that uses, in an explicit way, the economic sociology label or tries to unfold direct links between economics and sociology. Second, we review other themes of study that are closely connected to the field. Due to the dispersed status of the research, the list of authors presented in this paper should be considered provisional.

Institutionalised Economic Sociology

Sociology became entirely institutionalised in Portugal only after 1974, with the political democratisation of the country. Considering educational degrees or the thematic grouping of research, some specialities are very stable, including work and industrial sociology, urban and spatial issues, sociology of education and sociology of the family, for example. In contrast, the field of economic sociology is rarely mentioned. However, some exceptions exist. Taking the formal institutional side, the Institute of Economic and Business Administration (ISEG), from the Technical University of Lisbon, can be considered the stronghold of economic sociology in Portugal. It created PhD and Master degrees in "economic sociology and the sociology of organisations" in 1991 and 1992; and launched the Research Centre on Economic Sociology and the Sociology of Organisations (SOCIUS) in 1991[2]. Other institutions promoting this new field comprise the School of Economics of the University of Coimbra, where the PhD in Sociology includes a speciality in economic sociology; and the Institute of Social Sciences (ICS), from the University of Lisbon, where economic and development sociology is one of the strongest research lines. Outside these institutions, the economic sociology label is rarely used. Furthermore, we should emphasise that the institutionalisation of the field in some of the leading schools of economics and management does not mean that a fruitful dialogue or collaborative research between sociology and economics emerged.

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[1] We would like to thank Sara Falcão Casaca and José Manuel Mendes, as well as other colleagues in SOCIUS, for their suggestions concerning this article. The usual disclaimer applies.

[2] Courses on economic sociology and sociology of financial markets are also taught in ISEG at undergraduate level, for students in economics, management and finance.

While economic sociology is a task undertaken by a small number of researchers today, during the 1960s a more ambitious project was seemingly on its way. The journal in which modern sociology appeared, *Análise Social*, stated in its first issues the aim of linking economics and sociology. In an editorial published in 1964, on the occasion of the celebration of the 50th anniversary of the School of Economics (the current ISEG), the editors declared the intention "[...] to rend a valid contribution to the enlargement of scope of economic development studies in Portugal; to open the set of themes to discuss; to give place, in the analysis of facts and in the determination of problems, to variables not yet considered" (VVAA, 1964: 404). For this reason, an appeal to an "interdisciplinary dialogue" was made[3]. Some of the articles published in *Análise Social* in the 1960s testify to this aim. Two special issues were dedicated to the theme of development: one in 1964, on the social aspects of development; another in 1969, on its social and institutional features. Contributions by Adérito Sedas Nunes—considered the founding father of modern sociology in Portugal—and Alfredo de Sousa, both economists by training, were amongst the more relevant. They wrote papers on the social, cultural and political dimensions of economic development, on social stratification and new knowledge classes, on the methods of modern sociology (the case of Sedas Nunes), and on time conceptions as a cultural factor of economic development (the case of Sousa). Still in the 1960s, *Análise Social* edited a paper from Jean Cuisennier (1965) proposing a "sociology of the economy" which was in line with further papers in the same period. In the latter, social variables and agents' behaviour were identified as crucial for planning design.

After 1974, the specialisation of the social sciences deepened and the efforts for "dialogue" diminished. A brief analysis of the main sociological journals in Portugal yields few references directly linking economics and sociology or explicitly mentioning economic sociology. Among the main exceptions is an article from Ilona Kovács (1985) from ISEG calling for a more fruitful dialogue between economics and sociology due to answer the complexity and uncertainty of current times and the need for integrative thought. Some articles published in a journal from the University of Oporto, *Cadernos de Ciências Sociais* by authors such as José Manuel Moreira (1986), called for a revision of the basic assumptions of mainstream economics, namely the concept of rationality, the positivist methodology and the rupture with social norms and ethics. João Freire (1991) proposed research on sociology of economic life focusing on production, consumption, entrepreneurship and financial systems (his aim was to link these themes with the eventual "democratisation" of the economy). João Arriscado Nunes, from the University of Coimbra, was the more prolific, writing articles about Polanyi's social and economic modes of regulation and the sociology of economics (Nunes, 1994 and 1998, among others). Finally, authors such as Adelino Torres, José Luís Cardoso, Francisco Louçã, António Almodôvar, Fernando Catroga and Maria de Fátima Brandão explored the issue of the relationships between economic and sociological thinking.

Considering more recent research that explicitly uses both the economic sociology label and its theoretical framework, it comes as no surprise that the majority is produced in ISEG and

[3] However, we must remind the specific context in which this proposal was made. The aim was not so much to reconcile economics and sociology, since the latter hardly existed, but to elude the institutional constraints to the expansion of sociology and to pervade economic studies (and political debates) with the social dimension. The critical stance of these authors and the social catholic doctrine that many shared benefited from a broader social perspective.

particularly in SOCIUS. While part of this work is rooted in traditional streams of research like sociology of work and industrial sociology, other research corresponds more closely to what is currently recognised as new economic sociology. Here, we particularly think of the research conducted by José Maria Carvalho Ferreira on intermediary institutions (third-sector organisations); by João Peixoto on the international mobility of highly skilled workers; by Anabela Carvalho on ethnic entrepreneurs of Indian and Islamic background; by Maria João Santos on productive transformations in the context of local development; by João Carlos Graça on the thought of José Frederico Laranjo (a Portuguese social scientist from the turn of the 19th/20th century); by Rafael Marques on a general theory of reciprocity; by Rita Raposo on gated communities as a process of social and economic consumption; and by Marta Varanda on problems of collective action among small entrepreneurs of the traditional business sector (pioneering the use of network analysis in Portugal) [4]. Some of them are currently preparing the first reader on new economic sociology to be published in Portuguese (Marques and Peixoto, forthcoming).

It was also SOCIUS that organised the first scientific meetings entirely dedicated to the field. The first was a workshop held in 1995 that led to a book entitled "Between Economics and Sociology" (Ferreira *et al.*, 1996). The book includes sections devoted to the historical scrutiny of economic and sociological thought, theoretical debates on current economic sociology and theoretical and empirical analysis of related fields (values and development, poverty and exclusion, migrations, entrepreneurship). A particularly innovative perspective is introduced in the conjunction of chapters by João Arriscado Nunes and Carlos Gonçalves (University of Oporto), both on the sociology of economics. Building on earlier work, Nunes deals with the cultural impact of economic discourse, arguing that it currently displays the role of dominant rhetoric (approaching the theoretical contributions from McCloskey and Klamer). Gonçalves observes the slow and incomplete institutionalisation of the profession of economist (following the theoretical guidelines developed by Boltanski on the social construction of professions) which stands in stark contrast to its rapid symbolic success. Later, in 1998, SOCIUS organised the First Portuguese Congress on Economic Sociology, which gathered around 600 participants and various national and international keynote speakers.

Other Thematic Contributions

Although it cannot be directly labelled as "economic sociology", work and industrial sociology is undoubtedly the closest area that acquired a stronger institutionalisation in Portuguese sociology. It comprises graduate and post-graduate degrees or specialities, specific journals, a recurrent stream of research, scientific meetings and a professional association (Portuguese Association in Work, Organisations and Industrial Sociology—APSIOT). In contrast to economic sociology, several authors have already traced the paths and reviewed research on this speciality (Rodrigues and Lima, 1987; Stoleroff, 1992a and 1992b; Ferreira and Costa, 1998/1999; Freire, 2000). All commentators on Portuguese sociology admit that this is one of the strongest fields within the discipline and also one of the oldest, although

4 Other relevant research in SOCIUS include Ilona Kovács, on new models of production and work organisation; Maria da Conceição Cerdeira, on industrial relations; Helena Serra, on power relationships among medical and nursing professionals in health organisations; Sofia Bento, on the social controversies around technology; Sara Falcão Casaca, on gender and flexible modalities of employment; and Helena Jerónimo, on science, ethics and religion.

some difference is made concerning sociology of work (more mature) and sociology of organisations (more recent). The exact outset of the field is subject to dispute: some argue that work and labour issues were already a major concern in the 60s (Rodrigues and Lima, 1987). Others say that 1974 marked a rupture in the field due to the emergence of new themes of research and new theoretical perspectives (Stoleroff, 1992a).

The specific themes studied in this area varied. Right after 1974, it was mainly the working class, its demands, trade unionism and political links that were explored. In this period, a combination of a Marxist structural and an action based perspective (mainly inspired by Touraine) prevailed. Also subject to scrutiny were co-operative and self-managed initiatives, the relationship between technology, labour organisation and skills training and the history of the working class movement. From the 1980s on, new themes began to emerge. These comprise employment, unemployment and the flexibilisation of labour relations (Rodrigues, 1988, among others), technological change (including new information technologies), work organisation, qualification patterns and skills training, models of production (technocentric and anthropocentric—Kovács and Castillo, 1998), inequalities in labour markets (including the gender dimension), institutional regulation of labour relations and the sociology of professions. Some of the more prominent authors in these fields are João Freire, Ilona Kovács, António Brandão Moniz, the late José Baptista, Maria Filomena Mónica, Maria João Rodrigues, Marinús Pires de Lima, Maria Teresa Rosa, Maria da Conceição Cerdeira, Alan Stoleroff and Maria de Lurdes Rodrigues.

Other fields of research have been active as well. Firstly, these include the study of the informal economy. Some studies developed in the early 80s found a significant proportion of informal or underground economic activities in the country. The evidence was striking: macro-economic indicators suggested a period of deep crisis, whilst the individuals' consumption and well being was increasing. Manuel Villaverde Cabral (1983) was one of the pioneers of research in this field. Looking mainly into industrialised rural contexts, he found that agents combined strategies on the urban and industrial labour market, on part-time farming and on welfare benefits. According to him, "[...] rural environments are very rich of strategies unpredicted by macroeconomics" (1983: 222). Later, Lobo (1985) generalised this approach to other contexts, also stressing the links of the informal economy with social and economic structures and admitting the complicity of agents in informal activities: entrepreneurs, workers and their families. Several other sociologists and economists, including Maria João Rodrigues, also carried out research on this theme.

Secondly, a somewhat related perspective has been developed. Research on territorial contexts of production joined the efforts of sociologists, economists and geographers. Their aim was to reveal regional and local particularities on modes of production, regulation and consumption. Research by Boaventura de Sousa Santos (1985) and José Reis (1992), from the University of Coimbra, and Fernando Medeiros (1992) from the University of Paris and ISEG stands out in this respect. Santos carried an extensive review of regional indicators, arguing that the capitalist mode of production was not always matched by a wage-based form of social reproduction. Strategies around wages, part-time farming, financial applications (many resulting from emigrants' remittances) and welfare benefits co-existed, although territorially specific. Reis, an economist, studied a local production system in central coastal Portugal, following a line of research related to the industrial districts' approach (shortly after, this author explored the links between the state and the economy—Reis, 1997). Medeiros

theorised about the specificity of Southern European countries as "societies of multiple spaces" with varying forms of social and economic local structuration. Other relevant contributions on this subject came from João Ferrão and Rogério Roque Amaro.

Thirdly, studies on economic elites and entrepreneurship have some tradition. Still in the 1960s, a pioneering work of Harry Makler (1969) about the "industrial elite" in Portugal (based on his dissertation at Columbia University in 1968) settled the field. He studied the social characteristics of agents leading large manufacturing enterprises and their professional performance, considering a traditional and a "managerial" approach to the firm. Starting in the late 1980s, the field regained momentum with research by Manuela Silva (1989), Maria das Dores Guerreiro (1996) and Ana Nunes de Almeida, João Ferrão and José Manuel Sobral (1994) among others. Silva and collaborators conducted research on entrepreneurs and managers from the manufacturing industry evaluating their characteristics, attitudes and behaviour. Guerreiro studied small firms and the relationship between firm and family strategies. Almeida, Ferrão and Sobral applied a mixed perspective on entrepreneurship, combining space, social classes and family. Further work was conducted by Maria Filomena Mónica, Nelson Lourenço, Manuel Lisboa and Mafalda Cardim.

Finally, a set of other research lines, both established and rather recent ones, should be mentioned. These include intermediary institutions (third-sector organisations) and social exclusion, represented by authors such as José Pereirinha, Carlos Barros, Amílcar Moreira and Paulo Variz; state and collective action by Paulo Trigo Pereira; institutional regulation of the economy by Manuel de Lucena, Carlos Gaspar, Maria Manuel Leitão Marques and António Casimiro Ferreira; development studies by Jochen Oppenheimer and his colleagues at the Centre of Studies on Africa and Development (CESA), ISEG; values, attitudes and development by Manuel Villaverde Cabral; international migration, policy and labour markets by Maria Ioannis Baganha; economy and sociology of culture by Carlos Barros, Pedro Costa, João Teixeira Lopes, Eduardo Esperança and Maria de Lurdes Lima dos Santos; consumption studies by Cristina Matos and José Peixoto Viseu; and social uses of time by Emília Araújo. To conclude, notwithstanding their institutional dilemmas, economic sociology and related research appear to have a promising future in Portugal.

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