

## ***A note on the evolution, the specificity and the social relevance of Portuguese sociology***

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### **Abstract:**

This presentation tries to demonstrate that Portuguese sociology has been built on a set of virtuous relations between four poles of sociological activity: the theoretical problematization pole, the observational research pole, the reflexivity pole and the professionalization pole. It will be suggested that this specific dynamic was favoured by a series of political-institutional and organisational conditions (the dominance of a critical/applied rationalism in university training, the active role of Portuguese Sociological Association in the promotion of a creative interaction between academics and “field professionals”, the political engagement of Portuguese sociologists, the relatively successful opening-up of the labour market to professionally trained sociologists, etc.). The presentation also includes a comment on the possible contribution of Portuguese sociology to the re-invention of the scientific agenda and practices of the discipline and to the development of a “public knowledge”.

1. Portuguese sociology started to take shape as an autonomous disciplinary project about forty years ago. The argument that will be developed here is that if this project had been achieved with overall success, this was due to the virtuous interaction between *four poles of activity* that was established in the field of Portuguese sociology since its very beginning.

They are:

- (i) the *theoretical problematization pole*, representing the set of efforts which, in the scientific domain in question, seek to encourage theoretical updating and discussion among peers in a systematic way;
- (ii) the *observational research pole*, relating to the analysis of concrete social situations through theoretically and methodologically informed procedures for gathering and processing empirical information;
- (iii) the *reflexivity pole*, embracing critical and self-critical questioning on positions of principle and foundations of the theoretical options and

the technical-methodological operations required by sociological work.

- (iv) the *professionalization pole*, over-determined by the demands of social intervention in relatively circumscribed “practical” contexts and in contact with specific “lay publics”.

2. Portuguese sociology has early embraced, coherently with its critical perspective on the empiricist model of knowledge, the epistemological principle termed the “command function of theory” in scientific research. But it has also overtly adopted the reciprocal demand to confront interpretative hypotheses raised by the movement of theoretical problematization with the results of observational research.

This engagement in controlled systematic observational tasks has been one of the most important factors in the development of Portuguese sociology, not just because it stimulated the “progressive” reformulation of theoretical frames of reference (then countering the “normalizing” tendency of paradigmatic affirmation), but because it acted as a sort of reserve ready to act against conceptual formalism. The fact that research on concrete situations has been strictly instituted in the universities as a necessary condition for earning academic degrees and obtaining scientific credit has undoubtedly played a significant role in ensuring that the movement represented by a dynamic interaction between theory and observational research became an effective trait of Portuguese sociology.

3. It is widely agreed by authors engaged in the analysis of the origins of the institutionalization of Portuguese sociology that its protagonists participated and invested strongly in the epistemological debate (always political, to some extent) which, since the mid-1960s particularly, agitated the field of the social sciences as a whole. It has equally been noted in what measure this “virtue” actually arose out of “necessity” (as so often occurs in social life). In a country without sociology, there was a need for the group of candidate sociologists (coming from a wide diversity of disciplinary areas) to promptly and justifiably reconvert their original university training – hence they became non-intentionally proficient in epistemological issues.

Having adopted a highly critical perspective in relation to the principles and procedures of a predominantly empiricist nature (then still very much ingrained in this field of knowledge), and unreservedly accepting that the scientific approach of social

phenomena always contains a reference to values and never exempts itself from the effects of partly insurmountable theoretical-ideological conflicts, the heritage of reflections which was being consolidated from this time found fertile ground for dissemination among apprentices and practitioners of sociology, first at graduate level and afterwards in postgraduate university courses. Critical rationalism, as an epistemological model and as a practical principle for producing knowledge, managed to assert itself as dominant stream, notwithstanding the influence that "postmodernist" hypercriticism, and, at the other extreme, some positivist manifestations came to exert in certain sectors of Portuguese sociology. On the other hand - and this was still anchored in the "cultural goodwill" of the first apprentices -, an (epistemologically non-ingenuous) opening-up to theoretical pluralism was being imposed on the domestic scientific community.

The rate at which several works on epistemology and methodology, guided simultaneously by the critique of empiricism and a prudent demarcation *vis-à-vis* hypercriticism, are being republished and used in academic contexts is in itself a fair indicator of the degree of dissemination of the "automatisms of reflexivity" (even if there is in this expression a contradiction in terms) in the sociological practice of successive generations of Portuguese sociologists.

But to make a deeper assessment of the virtuous effects of these automatisms, it is worthwhile to bear in mind three other tendencies in Portuguese sociology: first, the agility with which extensive and intensive analytical methodologies intersect in research on concrete situations – the former, particularly prone to characterizing the structural conditionings of social practices, and the latter, close to the ethnographic observation pole, more able to highlight relevant singularities; second, a careful reflection on the specificity of social relations engaged in data collection tasks and on the need to take them in account in every moment of the observational process; finally, a very agile use of sophisticated data analysis (particularly, correspondence and multi-correspondence analysis) which prove to be more adequate than the classical regression analysis to express the relational, multidimensional and contingent characteristics of social phenomena.

Accepting this view about sociological practice in Portugal leads to believe, following the terminology proposed by Michael Burawoy in "For public sociology", that here *critical sociology* has been somewhat subsumed and embedded in *professional* (academic) *sociology*, acting as an effective operator of sociologists' professional

*habitus* (tacitly critical...), both in theoretical discussion and, above all, in observational research.

4. Another pertinent, and to some extent, original, aspect of Portuguese sociology is undoubtedly the connection and reciprocal interaction which occurred between the academic world and professional practice in (extra-academic) organizations, in which the aims of social intervention tend to surpass those of scientific interpretation/validation.

The adjustment between these two worlds is due to the importance reached, early on in shaping the field of sociology, by the promotion among sociologists (mostly through the Portuguese Sociological Association) of a professional culture that associated "science" and "practice". The popularity of postgraduate training among "professionals" has also operated in favour of the convergence of the activities and working interests mentioned earlier.

All the limitations that social intervention professionals have to cope with are known. They arise largely from the need to find urgent answers, "on the ground", to extremely intricate situations of social dysfunction, whose structural causes, being "remote" and virtually invisible, seem (and objectively become) to some degree "irreversible".

Even so, it must be stressed that, when it concerns the active involvement of professionals who keep fairly strong links with the centres of sociological academic production and reflexivity, the professional work of sociologists can give important contributions to scientific advancement.

In fact, it stimulates potentially a critical revision not only of the accumulated empirical knowledge about societies but also of the "abstract" hypercriticism of certain sociological reflexivity exercises. Besides, it can allow the public statement of social problems bereft of any audible spokesperson, and thereby enable the identification of innovative lines of theoretical problematization. In other words, the professional pole contributes, in its own way, to the reformulation of the theoretical agenda of the discipline (renewal of the relevant "*sociological problems*") and of the answers to the questions on the meaning of sociological knowledge - "*sociology: to whom and for what?*".

5. The reflexivity pole, in its essentially methodological and meta-theoretical components (reflexive knowledge directed overwhelmingly at academic audiences, that is, *critical knowledge*, according to Michael Burawoy), has always been responsible for establishing certain criteria to protect scientific work from coarse bias. But there is nothing to stop it from also playing an active role in the definition – subject to public scrutiny, and not only to the one of experts and peers – of the relevant domains (problems) to be appropriately explored by scientific work (*public knowledge*).

The “entry” of *public knowledge* into Portuguese sociology has come about from the way the political dimension of reflexivity was incorporated early on into the regular activity of producing knowledge aimed basically at peers. Having made its appearance in an intellectual context in which the wish to question, sociologically, the social reality was an almost obvious extension of the wish to put the dictatorship in check, virtually no issue on the embryonic sociological agenda in the early 1970s escaped some form of politicization.

Marxism, both as an analytical tool and as an instrument of systematic criticism of the explicit or implicit assumptions of the sociological frameworks prevailing at the time, was undeniably the most widely disseminated ingredient of the politicized stance which Portuguese sociology adopted in its initial phase. The fact is that, differently from what happened in other national contexts, the presence of Marxism in the university teaching of sociology remained and spread - albeit indirectly, through other theoretical frameworks (“critical theory”, “theory of practice”, “agency theory”) or by means of the pervasive presence of class analysis in sociological studies. We can hypothesize that this permanence has ensured that the discipline still retains a measure of analytical-interpretative non-conformism (at least in light of the inevitable trends towards paradigmatic standardization appearing in the field) in how Portuguese society and sociology as an instrument of intervention and social change are thought about.

6. The relationship between the four poles of sociological activity considered above has induced, besides many other effects, a virtuous opening of sociological theoretical agenda and an easy and fruitful connection between sociological and public agendas.

The multiplicity of sociological objects and debate topics which have mobilized the participants of the six Portuguese Sociological Congresses held until now gives a good measure of those traits.

Almost all sociological conventional domains (family and gender, education, culture, social identities and lifestyles, justice, politics, class structure, work and organizations, migratory movements...) were successively included in the scientific programs of these very much participated encounters. But the most important fact to consider is that, parallel to the attention given to theoretical and meta-theoretical debates (which never omit an explicit political component), their participants have been regularly invited to discuss hundreds of papers based on observational research on the Portuguese social reality as well as on relevant professional experiences “in the ground”.

The sociological studies on poverty and social exclusion which have been developed almost simultaneously with the former implementation of Portuguese welfare state are a good example of the fruitfulness of the interaction between sociologists with academic and non-academic institutional affiliations. Benefiting from a solid knowledge about Portuguese social structure and, simultaneously, from a precise inventory of social exclusion diversity, those studies have in fact produced a large and well founded information on the conditions and domains of social vulnerability in the Portuguese society, on social categories with greater incidence of poverty, on the specific ways of life of poor and excluded groups, on the institutional actors and practices in welfare networks, etc..

This virtuous weakening of the frontiers between academic and policy sociology has extended to many other research domains, such as: justice administration (particularly through the implementation and current monitoring of permanent surveys on access to justice, litigation, crime and security conditions, trial activities); family problems (through current expertise on the reforming of family law and social protection policies); urban renewal and territorial planning (through interdisciplinary cooperation mostly with geographers and anthropologists); cultural practices (through systematic analysis of the audiences of cultural events and of the institutional and non-institutional contexts of cultural reception); etc..

Rather than being a mere producer of instrumental knowledge to incorporate in the routine professional practices of sociologists, this type of studies has decisively contributed to put critically in perspective the public policies currently implemented in the country and to improve and enlarge the limits of the procedures of social intervention on all those domains.

Although we can admit that the sociology of public policies has progressively become, thanks to the open and creative relationship between the “four poles” we have considered, an autonomous domain of scientific research in the Portuguese sociological field (and also one of its specificities), the truth is that its real capacity to change the horizons of social intervention accordingly to an emancipative project must never be taken definitely for granted.

In fact, the attainment of such an objective will depend in a crucial way on the real capacity of the theoretical and observational sociological poles to analyse the nature and structural limits of changes that occurred in Portuguese society along the last four decades. Putting questions in a more general way, it is legitimate to believe that without a permanent and systematic effort of theoretical updating and critical revision of sociological knowledge on Portuguese social reality, the risk of conceiving the interaction between the four poles of activity in a utilitarian/pragmatic (albeit opportunistic) way is really high.

Portuguese society was marked by intense changes during the last four decades. They were, among others: the democratization of a political system dominated during almost half a century by authoritarian practices, censorship and a political police; independence and de-colonization of extended territories in Africa; a deep transformation of the economic system (abrupt decline of peasant economy and rural space, nationalization of part of the land and of the most important economic groups followed by several privatization programs, full integration in European economic community, deepening of uneven regional development tendencies...); an intense feminization of the labour market; a sudden change of demographic patterns (sharp decrease of birth and fertility rates and family dimension, de-institutionalization of family relations, double ageing and intense demographic decline of some regions, a metamorphose of the emigration/immigration patterns); an intensification of the bipolarized urbanization of the territory; an improvement, although still mitigated, of the educational standards of the younger generations; a re-structuring of class social profile (reduction of peasant and working classes weight, crescent proportion of the ruling and new middle classes); convergence towards “modern” value patterns (ideological pluralism, individualism, relative dissent from the institutionalized channels of political participation).

In fact, all these changes have coexisted in the Portuguese social formation with the maintenance of old (although sometimes metamorphosed) traits such as a strong

presence of informal economy and informal recruitment networks, great wealth inequalities, the resistance to school investment on the part of many families, an effective presence of the most conservative principles of Catholic church in the daily life of the rural population, the propensity to compensate economic fragilities through emigration, the recurring to family solidarities as an alternative to the welfare state support, and many others. Understandably, this coexistence puts very difficult questions at knowledge plan.

Anyway, having in view the robust results of the global theorization of Portuguese social formation as a “semi-peripheral” society, a society of “unachieved modernity” or a society of “intermediate development”, there are reasons to believe that the risk of analytical de-qualification mentioned above can be minimized – at least whenever the most part of the virtuous traits of Portuguese sociological field remains intact.

7. We have already pinpointed a certain number of *political, institutional and organizational conditions* that favoured (or at least did not impede) a “progressive” development of sociology in Portugal. Let us turn them more explicit.

One of those “exogenous” determinants refers to the nature of sociological training at graduate level, almost always organized around solid learning in the spheres of theory, epistemological reflection and the methodology of observational research. With the replication of such a demanding model at postgraduate level, it has been possible to reproduce a set of research procedures *and* professional routines globally inspired by an “applied rationalism” adaptable to the specificities and great changeability of Portugal’s social reality.

The role of Portuguese Sociological Association (APS) is another institutional ingredient which may be taken in account when we deal with the specificity of the field of Portuguese sociology. A high proportion of academics and professionals are members of this organization, which regularly invites them to discuss the various implications and difficulties of sociological work at well-attended conferences or seminars.

Another factor favouring the development of Portuguese sociology concerns the opening-up of the labour market to professionally trained sociologists, hard at first, but afterwards relatively successful. Contrary to the somewhat pessimistic forecasts, employability in this area has in fact remained at acceptable levels from the mid 1980s to the start of the new century. The factors that helped here were access to European



funds linked to social intervention programmes, plus, later on, the political option of national and local governments to broaden the spectrum of measures and policies directed towards the building of a welfare state, at the time still highly incipient, and, finally, the creation of a demand for sociological knowledge based on movements and institutions of “civil society”, itself in expansion due to the democratization process underway in Portugal.

Another of the forces that Portuguese sociology can (could?) rely on is the consolidation of its research apparatus, at first closely linked to the university system, but which has subsequently achieved a significant degree of emancipation. Having started early on by seeking spontaneous paths of internationalization (initially based on a desire for theoretical updating not confined to any of the hegemonic centres of international sociological production), this apparatus is today organically connected to foreign networks and research centres “of excellence”.

This aspect is the more encouraging the more and better sociology knows how to use it without losing sight of the requirement to analyse Portuguese society in all its specificity. Once again, both observational engagement and the opening up to reflexivity that have been a feature of Portuguese sociology can interact virtuously - now so as to ensure, as required of sciences that have to face the historically situated character of their objects, the compatibility of analytical instruments of “universal reach” with others capable of restoring specifically concrete social combinations (that are, to a certain extent, always unique).

#### 8. Last and very brief comment.

Nothing guarantees that the (“exogenous”) conditions that have been the creative force behind the “four poles” interaction will remain stable and keep intervening in Portuguese society.

It is not certain, in the first place, that the graduate and postgraduate training model for sociologists adopted by Portuguese universities in the wake of the Bologna Process will ensure such consistent learning as was achieved in the first decades as the discipline developed. Dominated, in practice, by motives of “employability” and “mobility” (terms defined much more in the register of the stereotype than in that of the sociological reflexivity), this model may be at risk of compromising not only the preparation of sociologists for the tasks of developing and renewing the paradigmatic

guidelines of the field, as is more obvious, but also the actual fundamental training for a demanding professionalization.

If we further agree that, with the generalization of neo-liberal views even within the ideological world of social-democracy, the opportunities for employment and sociologically demanding social intervention in the state apparatus will decline steadily, then it is foreseeable that the Portuguese sociology will become more and more permeable to disqualifying logics. With greater reason, it is legitimate to expect that the "breathing space" introduced by the reflexivity pole will be reduced.

In these circumstances, everything suggests that the mediating role of APS in the qualification of the Portuguese sociological field will find itself increasingly under threat. And maybe we will find in the future that the discussions about how to gain and legitimate a certifiable professional status at European level will prevail over the initiatives which encourage the virtues of the culture of association between academics and professional sociologists.

Are we on the path to a new era for Portuguese sociology?

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