



REGIONAL AND LOCAL RESPONSES IN PORTUGAL

**IN THE CONTEXT OF
MARGINALIZATION
AND GLOBALIZATION**

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THE CONSUMER SOCIETY IN THE COMMUNITIES OF A SEMI-PERIPHERAL COUNTRY: PORTUGAL

The consumption society, stimulated by the capitalist ideology of profit, exhibits an important spatial diversity, associated with the different levels of socio-economic development. With the Portuguese economy having an established social life predominantly dependent on agriculture until the end of the 1960s, the socio-economic aspects characterised Portugal as peripheral in relation to the economies of the centre of the Europe. However, the *social cushion*, in the form of social relations and income supplements allowed the Portuguese, who were starting to manage the remittances sent by their relatives who had emigrated and were working abroad, to achieve rather higher levels of consumption in relation to the importance of capitalist production in the sixties and seventies. Other elements in this disconnection are related to the proliferation of the forms of “backing economy”, socially/spatially differentiated expenditure structures and relations of neighbourhood, kinship and friendship which function as a welfare society in a country with a significant lag in the welfare state.

With the emergence of the years of plenty in the 1950s, consumers started to become more vulnerable to the marketing distribution machine that began to develop in the First World and then spread to developing countries.

According to Rochefort (1995), the period immediately after the Second World War brought changes to the earnings of the working classes, who saw their standard of living rise. This increase in purchasing power led to changes in spending structures which was, in fact, a way for capitalism to increase demand in households and thus to use up production. This change

was achieved without any altruistic intention on the part of the controllers of economic options¹²: the employers managed to pay their workers better because of the introduction of new working methods, particularly in the industrial sphere. Mass production, quicker and cheaper unit production, allowed employers to enjoy greater profits as the new organisation of labour was introduced. With fewer hours spent at work and a shorter working week workers found themselves with more spare time, and so they began to spend more money in search of well-being, comfort and a social identity. The capitalist mode of regulation succeeded in sustaining demand for the better consumption of supply, via its agents, and this enabled them to increase their profits.

This system came rather later to Portugal, and with significant variations. As Abreu (1995: 621 to 633) has said, a new Portugal was emerging at the end of the 20th century. With the national production system subject to cycles of optimism and depression, the Portuguese revolution (April 1974) occurred in the middle of a world economic crisis. This was having important consequences for the welfare state, which was only just affecting the Portuguese population and providing levels of social welfare well below those found in other European countries.

The revolution was to reflect an ambivalence that made the country a landmark of the semi-periphery, in accordance with the interpretation of the world system advanced principally by Braudel and Wallerstein. This system has a tripartite form, comprising the centre, the semi-periphery and the periphery. Its “most problematic component is, without doubt, the semi-periphery [because] there is a huge economic, sociological, historical and geographical reality that can be described as a stratum of intermediate economic and social situations” (Reis, 1992: 25) between the centre and the periphery, where Portugal is placed.

¹² This employer-employee relationship emerged in the period leading up to the 2nd World War, and is linked to the importance of the power to demand that came to be granted to and recognised in the trades unions, which formed part of the regulatory processes that marked the Fordist period.

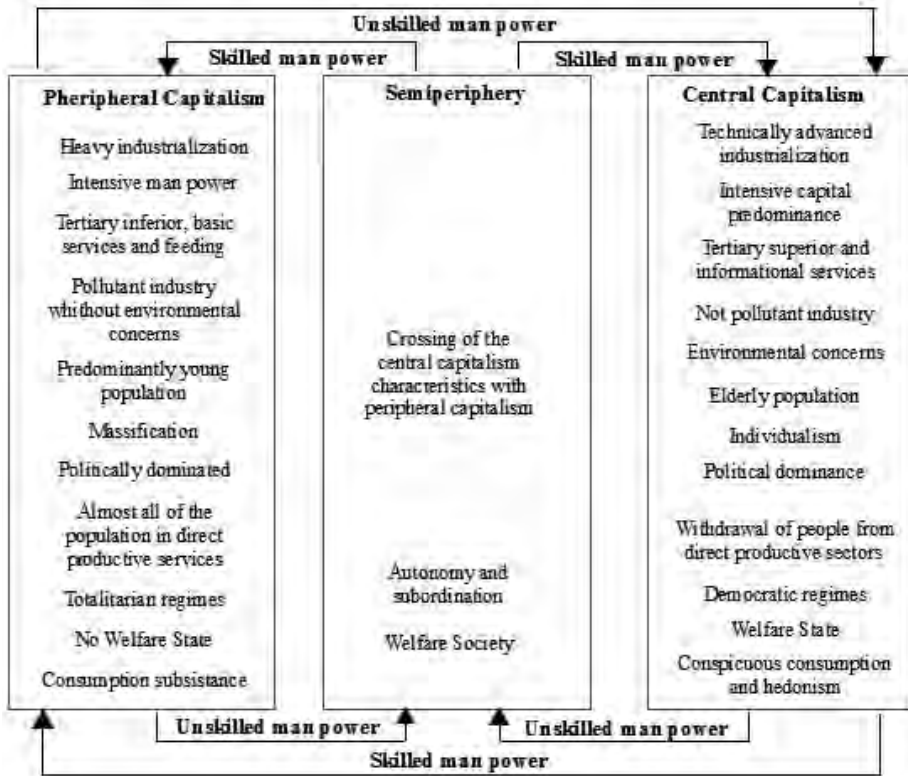


Figure 1 — The systematization of relations in a tripartite world.

Source: Adapted from Santos, 2001

The systematization of relations in a tripartite world (Figure 1) shows that the semi-periphery results from a combination of socio-economic and political-cultural characteristics. This combination leads to a situation of intermediate development, which is also one of political influence, and to a “position that is, at the same time, one of subordination and of autonomy” (Reis, 1992: 26). This far-reaching definition makes it possible to define Portugal’s position in the global processes of evolution of the capitalist

system. It is necessary, however, to “pay heed to its domestic conditions [to] bestow importance on the original processes and on the peculiar configurations (Reis, 1992: 27 and 28). These aspects are considered by the theory of regulation that came to be imposed, especially with the Fordist regime of intensive accumulation by means of a virtuous circle of relations between supply and demand in the world economy.

For Portugal, this glorious period in its economy only became evident with the advent of the *Marcellist Spring*, through the “State-led renegotiation of its position in the world order” (Santos, 1990: 105). But as Sousa (1995: 614) has said, 1959 and the Treaty of Stockholm, which saw Portugal joining EFTA, were the first signal from within the system – the *Estado Novo* [New State] – concerning the repositioning of the country at the level of economic internationalisation. This was the first direct contact with the accumulative Fordist regime, a model largely based on industry and hitherto rejected thanks to the hegemony of the farming and trading bourgeoisie over the industrial and financial bourgeoisie, already long in a dominant position in Central Europe. Portugal’s backwardness relative to the rest of Europe was obviously reflected in patterns of consumption, in both communities and families. The *Estado Novo* and ruling Fascist regime were extremely important to retaining purchasing power and for the propaganda upholding a life that is “poor but clean”, endured by a majority of the people of mainland Portugal and the Adjoining Islands. During the Empire, the exception came precisely from the Colonies where, in comparison with European Portugal, the purchasing power and standard of living were significantly higher. This was the result of a less rigid policy of control (which even tended to yield a bourgeoisie, or wealthy class, farming and industrial alike), and much more open to foreign investment.

Though emigration was not a new feature in the evolution of Portuguese society, the decades in question corresponded to a significant population exodus. As it increased, “The intra-European immigration movement caused widespread emigration in the entire Portuguese territory, while overseas movement encompassed regions with a more limited recruitment” (Santos, 1993: 321). This population ‘bloodletting’ had negative demographic effects on the country, but it was nevertheless the beginning of the consumer

society in Portugal. Emigration is responsible for population ageing and for the reduction in the replacement ratio, because of the large number of young people who left the country (the age group best able to increase and diversify the consumption of goods and services). Another consequence was the drop in the number of children, since the men left and the women tended to stay, at least in the first phase.

Emigrant savings during this period were not particularly high, and were mostly used to modify the status of the emigrant within his community of origin, rather than to diversify consumption. Contact with societies in Central Europe, especially France, nonetheless triggered a process whereby values and mentalities were changed, and consumption promoted. Comfort was influenced first in the context of homes and household equipment, and then more generally through an increase in both quantity and the choice of consumables available.

Between 1950 and 1968/69, society in Central Europe experienced the phenomena of the expansion in the food industry, growth in the number of private cars and increased demand for recreational activities, which was associated with the relative drop in expenditure on food. All these found a common denominator in supermarkets, with their new methods, new spaces and new rhythms, which they imposed on the general public. In fact, the situation was one of valorisation of an urban lifestyle, which Portuguese society only exhibited in very specific parts of its territory, since “the fact that structural transformation of the economy came late in relation to the countries of [Central Europe] was reflected in the structure of the urban network” (Gama, 1993: 118).

An urban lifestyle, with increased expenditure on transport, where use of the car became commonplace, women were routinely found in the workplace, the organisation of family rhythms was changed – all of which had significant impacts on the level of consumption – only found an echo in Portuguese society outside the large urban centres at the end of the 1970s.

Modifications in the structure of consumption in Portugal, in its development towards mass consumption, actually emerged at the end of the 1960s. The ‘modest, shy and obedient’ country was then starting to be replaced by another, which Salazar rejected, but which the political and better-off classes

(basically technocrats) were keen to embrace. Indeed, “even here, in your old Portugal [that of Salazar] imitations of foreign ways were beginning to be perceived, desires for immoral reading, appetites for deviant consumption” (Barreto, 1996: 211). If the process resulted in preferential access to information and markets for the ruling classes, the modifications came to be more firmly embedded in the population at large. As the Welfare Society was a relevant factor and the characteristics of semi-peripherism were present, it is also interesting to note that “at the end of the sixties, there began a period of labour upsurge that was unprecedented in the history of the regime, and [which] the industrial-financial class itself saw in the corporate guardianship of capital/labour relations as a corset, hampering the expansion of its hegemony over more sectors of the bourgeoisie, and over society in general” (Santos, 1990: 20). It is therefore clear that only at the end of the 1960s did a certain phase of the capitalist system make effective inroads in Portugal and start to change the structure of working people. This transformation meant that peasants became workers, that their productivity and mobility increased, and that services began to spread throughout the land. This proliferation did not take place evenly, however, and so the news of better lifestyles, sustained by better wages, led to the most important process of mobility in the very core of the Portuguese population.

There was perhaps a reflection of this backwardness in Portugal, revealed as a “divergence between capitalist output and social reproduction” (Santos, 1990: 116). This arose because “the development of the banking system, along with demands for the development of the economy, meant that financial capitalism in Portugal seemed to be fifty years behind the times, in relation to Europe.” (Sousa, 1995: 622). The Portuguese economy had tended to prescribe a social life that was predominantly reliant on agriculture until the end of the 1960s, with socio-economic indicators showing values that characterised Portugal as a peripheral country in relation to the economies of Central Europe. The *social cushion* provided by earnings from agriculture thus complemented other income, and allowed the Portuguese, who were now beginning to control remittances from relations who had emigrated, to achieve levels of consumption somewhat in excess of the amount realised by capitalist production at the time. A third and fourth elements in this

disjointed process were linked to the “proliferation of forms of what is commonly known as the ‘underground economy’ (...) and [with the] increase in interest rates for deposit accounts, which became one of the main sources of income for Portuguese families” (Santos, 1990: 123 and 124). In this way, therefore, consumption suffered a certain decline, with most salaries and wages being channelled into savings.

Some significant changes thus occurred which resulted from new ways of utilising time and space, whether by families or by social and economic pressures external to the family.

The first point to note is that monetary expenditure increased perceptibly.

A second important aspect is that of the relative reduction in spending on food and drink. Spending on food, which stood at around 80% in the 1940s, fell by 100% between 1940 and 1990.

However, this reduction in percentage expenditure on Food, Drink and Tobacco has remained until today. The 2004 data show that the population now spends 30% less on Food, Drink and Tobacco than in 1990. The approximation to the structure of expenditure of developing countries is really striking.

A third point of reference is equally important, which is that expenditure grouping changed vis-à-vis significance, in the framework of family spending. Generally speaking, it may be said that spending on Transport and Communications increased the most, rising from about 5% in 1967 (Tables 1 and 2) to over 17% in 2004 (about 300% increase). These figures show the growing importance of suburbs as residential areas, and of the increase in distances travelled by families, in terms of both home and work and other journeys, caused by family economies of scale: daily journeys to work, to school, for shopping, and for recreational purposes. Other reasons for the increase in question have already been mentioned.

The groups most affected by the increase in spending on Transport and Communications were:

- in the sixties and the beginning of the seventies, Furniture, Decoration Items and Appliances;
- at the end of the seventies, Housing, Heating and Lighting;

— in the eighties, Housing, Heating and Lighting (along with increased spending on transport, people found they were spending more on Housing than on Clothing)

| | 1967 | 1973 | 1980 | 1990 | 2004 |
|-----------------------------------|-------|-------|-------|-------|-------|
| Food, Drink, Tobacco | 47.01 | 44.76 | 40.58 | 31.08 | 21.14 |
| Clothes and Footwear | 8.55 | 8.81 | 10.13 | 8.86 | 7.7 |
| Housing, Heating, Lighting | 14.25 | 13.57 | 9.17 | 9.55 | 13.42 |
| Furniture, Decoration, Appliances | 6.84 | 5.87 | 8.67 | 8.09 | 7.42 |
| Medical and Health Services | 3.99 | 2.66 | 2.6 | 4.44 | 4.98 |
| Transport and Communications | 5.41 | 7.41 | 13.53 | 15.25 | 17.26 |
| Education, Culture, Entertainment | 4.84 | 4.06 | 3.71 | 6.43 | 7.84 |
| Other Goods and Services | 9.12 | 12.87 | 11.58 | 16.31 | 20.25 |

Table 1 - Average annual expenditure per household (1967-2004)

Source: Surveys on Family Earnings and Expenditure, INE, Lisboa

A fourth aspect to be noted concerns the fact that the last two decades reveal a significant amount of family expenditure (around 100%) going on Other Goods and Services. These tables are symptomatic of the importance that personal hygiene and beauty care, recreation (travel and eating out, using cafés and hotels) and financial services acquired in Portuguese families. The diversification of goods and services used, together with the reduction in the life of the items acquired, is a real feature of contemporary society.

| | Variation (%) | Difference |
|-----------------------------------|---------------|------------|
| | 1967-2004 | 1967-2005 |
| Food, Drink, Tobacco | 45 | -26 |
| Clothes and Footwear | 90 | -1 |
| Housing, Heating, Lighting | 94 | -1 |
| Furniture, Decoration, Appliances | 108 | 1 |
| Medical and Health Services | 125 | 1 |
| Transport and Communications | 319 | 12 |
| Education, Culture, Entertainment | 162 | 3 |
| Other Goods and Services | 222 | 11 |

Table 2 - Average annual expenditure per family unit (1967-2004)

Source: Surveys on Family Earnings and Expenditure, INE, Lisboa

The structure of expenditure is today more significant in Transport and Communications and in Other Goods and Services (Table 2), while Education, Culture, Entertainment show a small increase in expenditure. Clothes and Footwear and Housing, Heating, Lighting are in slight decline, while Furniture, Decoration, Appliances and Medical and Health Services show a slight increase in average annual expenditure per household.

Mass consumption today is a way of enhancing and, at the same time, constructing the *I* and a social identity. Regarding consumption as an assumption of individualism arose from the importance given to hedonism (relative to ascetism and Puritanism). “The traditional culture of character, which stresses moral qualities, has been replaced by a culture of personality that lays emphasis on being appreciated and admired” (Gronow, 1997: 2). This motivates the individual to exert himself to satisfy desires, tastes and pleasures in a bustle of actions that assume the representation of a social identity (the search for difference and the quest for integration or relationship through similarity – of desires, tastes and pleasures, but also of cultural levels, activities, of places and spaces) expressed in lifestyles. In other words, these result from sundry influences among individual options; socially inculcated options (memories, according to Connerton (1993), *habitus*, according to Bourdieu (1979), or *marketing*, according to Williamson (1991)) and institutions of control that limit deviations (Lauwe, 1983: 154 and 155).

The quality of life and well-being are increasingly dependent on institutions that standardise structures, regulate experiences and ‘choose’ what to buy, what is fashionable, the places to go. This makes it difficult for needs, desires and interests to be an expression of individual will, which results in the interiorisation of a social culture that influences individuals’ attitudes, and, therefore, their structure of consumption (at the level of things, services and places), given that it creates barriers or motivates their relations within society (neighbourhood, community, work, leisure). Hence the importance ascribed to knowing “to what extent the organisation of the family budget is the work of its members, that is to say, an act that is voluntary and relatively free, or (...) a pressure from society, and so from the ideology of the ruling classes” (Lauwe, 1983: 150). This makes it useful to discuss the typology of needs, desires and aspirations (all of which are closely linked to consumption) that

inhabit the spatial-temporal reality of every day, and the non-temporal and multi-dimensional imagination of each and every individual.

When reference is made to the existence of needs, people associate the expression with the lack of something important for the well-being of an individual, a family or of a wider group. The social process prevailing today is the collapse of the community, thereby releasing individuals, even though this is through their isolation, and encouraging urbanism. In the case of Coimbra, isolation and integration occur simultaneously, in spaces close to one another and merging into one another, between the urban and the peri-urban, as the locations of the benchmark parishes serve to demonstrate. But it is useful to stress that isolation is seen with growing frequency to be an expression of a quality of life. In other words, the non-interference by neighbours in an individual's private life is a quality of life sought by many who find their social relations further afield, through an urban existence that is less communal, more individualist and which has greater spatial expression.

It is important, therefore, to mention how people rate their relationships with their neighbours, and how, in their space, they take on such relationships. In Coimbra, there is an urban parish called Santo António dos Olivais, and another, Vil de Matos which is largely rural, while São Paulo de Frades is somewhere between suburban and peri-urban and Cernache exhibits morphology and ways of living that are more urban, mostly because of its geographical location.

Figure 2 gives a list of (household) tasks related to the home or surroundings and quantifies the importance of relations of proximity and neighbourhood in people's everyday lives.

The first conclusion to be drawn from this is the significance of neighbours in the sphere of domestic jobs. In effect, the activities mentioned enjoy the collaboration of at least 10% of neighbour co-operation, with some tasks benefiting from almost 20%.

These figures suggest a "kind of protected community [solidarity among neighbours] by virtue of the nature of local ties and neighbourhood relationships" (Gama, 1992: 169). Such communities are representative of non-metropolitan urbanisation processes.

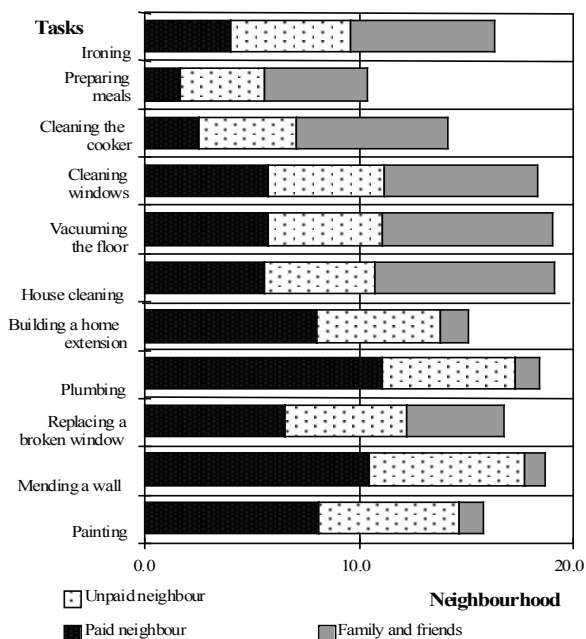


Figure 2 — Neighbourhood participation¹³ in household jobs

Source: Survey of mobility and consumption

Urban, suburban and peri-urban spaces where these proximity relationships occur clearly show the existence of communities in Coimbra and its outlying areas. It can thus be characterised by the interaction of the forces operating between informal networks of local solidarity (based on relationships, neighbours, and reputation), on the one hand, and the functional networks (predominantly linked to work) and sociability (resulting in equal measure from work and non-work relations), on the other. The outcome is the constitution of communities that are protected, but which show a great deal of dialogue with emancipated communities (urban attraction, on the one hand, and

¹³ The existence of services rendered by neighbours who are paid could be due to there being workshops and services owned by the individuals concerned, and these can even still be found in towns within the metropolitan areas. Therefore, it would be proximity and not give-and-take that governs relationships. At any rate, their existence encourages communal reciprocity, which should be borne in mind when characterising neighbourhood relationships.

peri-urban dispersion of town dwellings, on the other, are responsible for this osmosis). We are thus dealing with emancipated communities that are sprinkled with a certain social protective covering, leading to the advent of payment for neighbours' services. At the same time, this is a symptom of a solvency relative to the characteristics of protected and emancipated communities, which are expressed and represented in the same physical space.

Figure 2 shows that the demand for neighbour relationships is processed differently according to the jobs that are used as indicators of their existence. Tasks inside the home (meals, cleaning, other routine jobs) show a predominance of relatives, whereas those related more to outdoor activity show that neighbour relations, unconnected with family or friends, play a greater part. While the first (relative relationships) operate as a dual flow, corresponding to an exchange of services (farming as a second activity is an important proportion of such exchanges), the second (neighbour relationships) results from the existence of distinctions between neighbours at the level of reputation, and from the property that transforms, formally or informally, such relationships into working relationships, too.

Paying for neighbours' services is, then, the sharing, in just one space, of relationships of production and social reproduction. This is a process that has genuine advantages for all concerned: the employers, who have workers who are more tractable and usually more flexible in terms of working hours; the workers, who can juggle these working hours and keep as the centre of their activities the space of family reproduction *par excellence* – the home and the neighbourhood.

It can easily be seen that this reality is expressed differently in the four parishes studied. Looking at some routine activities, daily and non-daily (getting meals ready, cleaning the house and ironing) Santo António dos Olivais clearly stands out from the other parishes. Neighbour relations based on exchanging favours are far fewer there compared with the others, and what actually predominates is the payment for neighbours' services (Figures 3, 4 and 5), valorising relations of reputation and property which seem to be maintained, even within the town area. This fact has to be regarded as one of the features of non-metropolitan urban areas, explaining the exchange of influences between emancipated and protected communities mentioned earlier.

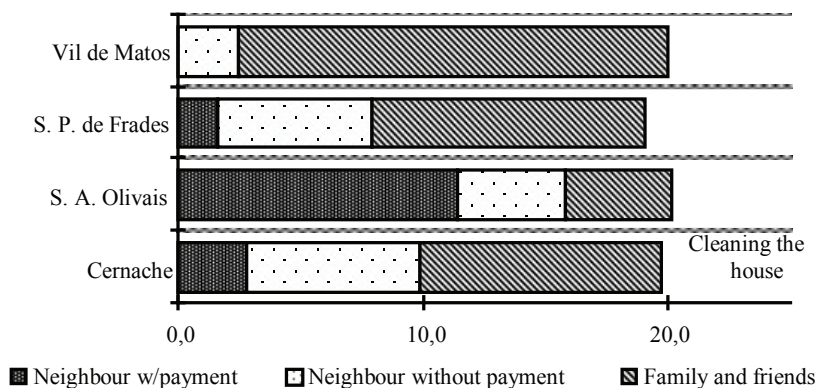


Figure 3 — Neighbour participation in household jobs (cleaning the house), by parish

Source: Survey on mobility and consumption

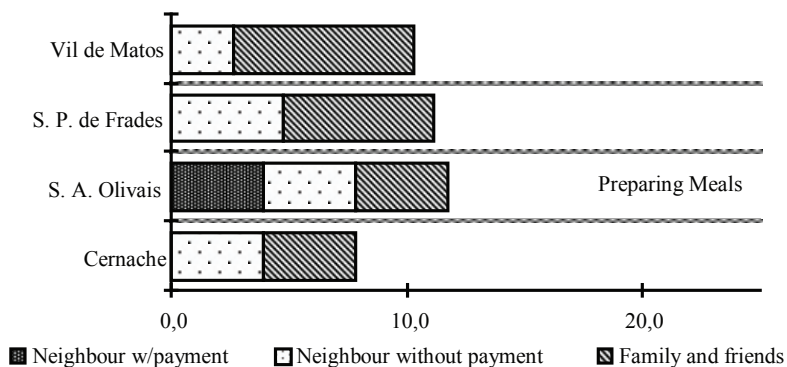


Figure 4 — Neighbour participation in household jobs (preparing meals), by parish

Source: Survey on mobility and consumption

It is clear that different activities foster a greater or lesser number of neighbour relationships, whether remunerated or not. These variations also result from the use of different working rhythms (working by the hour, half day or full day, for just one or for several employers) and suggests that families with house-help do

not come only from peri-urban areas, but that many live close to their places of work; this is probably the main reason for their integration in the world of work, since the overwhelming majority of them are women.

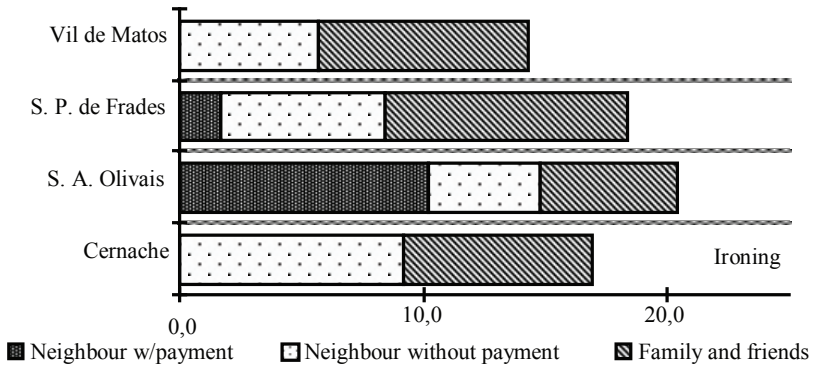


Figure 5 — Neighbour participation in jobs related to home (ironing), by parish.

Source: Survey on mobility and consumption

At the opposite extreme, in terms of characterising neighbour relationships, we have the parishes of Vil de Matos and São Paulo de Frades. Services are rarely paid for there since it is mostly relatives and friends who perform the roles in proximity relations. In these parishes a significant part of the population is engaged in farming (full time in Vil de Matos, and part time - in a multi-activity regime - in São Paulo de Frades, where the people have jobs in trade and services in Coimbra city), and reciprocal help continues to be an important feature of the way of life.

While these figures are an expression of the existence of protected/emancipated communities, they are also indicators of local differences that individualise the space surrounding the city and demonstrate situations of semi-peripherism.

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