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# The Short Life of the New Middle Classes in Portugal

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**Abstract:** This article is based on research addressing the process of consumption as cultural practice; that is, the goods and services consumed are evaluated in terms of their resocialization by social actors. The research covered 24 households from Portugal's urban middle class and involved in-depth interviews and ethnography. This text explains some consumption practices and correlative cultural expressions of the new Portuguese middle classes, which confirms their very recent expansion, as well as their undeniable weakness, particularly financially. The strong tendency of this social segment for the *remediado* (person/household in an average, modest financial situation, with just enough for their needs), together with the current financial crisis, point to a rather short life for Portugal's new middle classes.

**Keywords:** anthropology of consumption, new middle classes, crisis, Portugal, in-depth interviews, ethnography

**Résumé :** Cet article s'appuie sur une recherche qui aborde le processus de consommation comme pratique culturelle, c'est-à-dire que les biens et les services consommés y sont appréhendés en fonction de leur resocialisation par les acteurs sociaux. La recherche couvre vingt-quatre ménages de la classe moyenne urbaine au Portugal, et comprend des entretiens en profondeur et une enquête ethnographique. Cet article élucide certaines pratiques de consommation des nouvelles classes moyennes portugaises, de même que les expressions culturelles qui leur sont associées. Il confirme de ce fait l'expansion très récente et la grande faiblesse de ces nouvelles classes moyennes, notamment du point de vue financier. La forte présence dans ce segment social de *remediados* (personnes/ménages dont les moyens financiers modestes sont à peine suffisants pour subvenir aux besoins de base), conjointement à la crise financière actuelle, portent à croire que l'existence des nouvelles classes moyennes au Portugal aura été de courte durée.

**Mots-clés :** anthropologie de la consommation, nouvelles classes moyennes, crise, Portugal, entretiens en profondeur, enquête ethnographique

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## Introduction

This article is based on research that approaches the process of consumption as a cultural practice; that is, goods and services consumed are equated in terms of their resocialization by the social actors. The social actors in the research sample were members of 24 households, assembled because they can all be grouped in a common predefined category of "middle class." The self-imposed access to specific consumers, considering them in their regular consumption practices and locating them in their family contexts, was achieved by adopting a clearly qualitative methodological device based on in-depth interviews and ethnography with these Portuguese middle-class households.<sup>1</sup>

Completed in 2007, the research that underpins this article upheld the fundamental idea that commodities (even if mass produced) are inevitably socialized; at the same time, its main objective is to demonstrate the plurality of possible appropriations performed on the same commodities. The intention was to show the coexistence of plural processes of appropriation of commodities carried out by social actors who enjoy the greatest possible structural proximity to one another.<sup>2</sup> The successful achievement of these goals, however, made two supplementary analytical developments possible. On the one hand, it allowed access to the subjective experiences of informants' consumption, abundantly illustrating the possibilities of resocialization of the commodities. On the other hand, it also provided a quite comprehensive understanding of the values, representations and ambitions operating in the lives of those 24 households from the new Portuguese middle classes. The relative structural unity of the research sample ensures a medium that can help us to understand the social realignments taking place in Portuguese society and to explain some of its peculiarities. In the qualitative characterization of the households, what stands out in various ways is the very recent nature of their upward social mobility and the strongly *remediado* tone of their lifestyles (i.e.,

households in average, modest financial situations, with just enough for their needs). These traits are related to the equally special political and social situation of Portuguese society, in which the 1950s and 1960s did not coincide with the strong growth of the new middle classes as it did in the rest of Europe. At that time, Portugal was a country under a fascist dictatorship, without even the most elementary political freedoms, where technological development, the tertiary sector and educational levels were very low and the building of the welfare state had not yet begun. In these circumstances, the salaried middle class was merely residual, and any significant flows of upward social mobility were evident only after the political and social revolution of 1974. This factor makes both the weakness associated with the recent character of the social mobility experienced and the instability enhanced by the current context of crisis even more obvious. I believe that this article can remedy some of the neglect that has been given to the phenomenon of the middle class in Portugal and contribute to an understanding of its particular features.

Regarding methods in this study, the selection of potential social actors for participation in the research began by randomly contacting visitors to Norteshopping, a large shopping centre in Porto city. The final formation of the research sample was arrived at by a subsequent selection from among those informants who were initially contacted and was comprised of only those households that met a set of predefined conditions. The intention was to create a sample of the "middle class" that would provide access to households from the new, predominantly urban middle classes. About 50 visitors to the shopping centre were initially contacted; with them I established quite informal verbal contact, asking them to talk "a bit about their usual shopping behaviours" and telling them of my research objectives. These initial conversations might be shorter or longer depending on people's availability. In all cases, these conversations served to obtain consent for subsequent encounters with the investigator, as well as to collect some conventional class indicators and other information relating to the lives of individuals and their households, such as professional occupations, composition of households, educational qualifications and ownership of the family home. On the basis of this information and the agreement of respondents to continue in the investigation, our research sample was 24 households, which we would access through one of the previously contacted household members. Geographically, these households were spatially distributed in the city of Porto and within a radius of 50 kilometres around the city, thus not forming a "community" in territorial terms. The research

continued with an initial interview, more formally defined and recorded, carried out in the family home or another location chosen by the respondents, such as their workplace or the shopping centre. On average, these first interviews took up to two and a half hours. Two or three months later, I started a second round of interviews (and in some cases, later still, a third interview), completed in the same way, but this time all interviews took place in the interviewee's family home. The main topics of conversation during the first interviews were gifts and the circuits of family gift exchange. In the second round of interviews (and the third, when they occurred), the central topics were the patterns of consumption and the services used by the household.

The format of the interviews, in increasingly personalized and private spaces, often with the presence of two family members (the couple or members of the two generations present in the household), allowed incorporating an ethnographic approach that helped surpass mere interview collection of data. The ethnographic strand of the research translated into an effective approach to the everyday life of the subjects, in the repetition of successive interactions with the same individuals and in the progressive character of the relationships, achieving an improved understanding of the consumption practices of households and their valuations. This articulated method of in-depth interviews and ethnography lasted over months of contacts with selected households. Furthermore, the analysis did not involve any specific, predefined consumption item. The consumption process is something like a *praxis*, an actual action, whose results tend to manifest in creating environments that assemble, expose and combine several consumer items. At the same time, except for strictly research procedural reasons, the selection of certain consumer items rather than others for analysis was always fairly arbitrary. In view of these considerations, I chose to establish six consumption domains: house and household goods, food, offspring, personal appearance, leisure and culture, and gifts. These consumption domains represent particular subdivisions inherent in the organization of household life and are immediately seen as embracing sets of goods and services.

To conclude this introduction, I would like to point out that opting for the middle class as a social area for analysis and then addressing consumption as a cultural practice offers the added value of being able to contribute to the characterization of the "middle class" as a group. Beyond the possible internal heterogeneity of this sector of the social structure (which is also present within the research sample), consideration of the middle class as a whole reveals a certain normativity that is able

to provide a reasonably penetrating qualitative picture of the new Portuguese middle classes. On the basis of this investigation—which can be labelled “intrusive” because of the insight it allows into the reality of these new Portuguese middle-class households—this article tries to explain some of these households’ consumption practices and correlative cultural expressions. There has been a time lag of just over five years between the initial contact with the informants and the writing of this article, and this has become significant owing to the widespread financial crisis (in the state and society) in which Portugal is immersed. However, as will be seen, even before this financial crisis, the insecurity and weakness in this sector of the social structure stood out quite clearly, although its very recent expansion has never been given much opportunity for consolidation.<sup>3</sup>

### The Middle Class: A Polemic Notion

Before explaining some consumption practices and correlative cultural expressions of the new Portuguese middle classes, we have to consider (within the constraints imposed by the size of this article) the history of the theoretical treatment of the concept of the middle class. It has been a matter of controversy from the start, because Karl Marx and Max Weber, the two founders of the sociology of social classes and stratification, viewed it in opposite ways. Marx gives absolute centrality to the sphere of the relations of production and emphasizes the polarization of the classes by opposing capital and labour—the bourgeoisie and the proletariat. As a result, the intermediate strata of the social structure are perceived as doomed to vanish by the logic of the concentration of capital, which is viewed mainly as supporting the interests of the ruling class, while very little attention is paid to the middle strata. Marx saw the presence of a large middle class as the negation of his argument of two antagonistic social classes.<sup>4</sup> Weber, however, also considers the existence of a relational structure of values and behaviours materialized through *status groups*. As a result, he not only recognizes the existence of the middle class but also gives prominence to social mobility—both upward and downward—which is key to analyzing the practices and representations of its members. This initial discord and the respective theoretical legacies led to the emergence of the two main currents of the sociology of social classes—Marxism and Weberianism—whose disputes about the phenomenon of the middle class were to last for the entire 20th century.

As a rule, Marxists see the notion of a middle class more as a problem than as a solution and avoid the term (Aguar 2010), accepting, if anything, the description of these strata as “intermediate categories.”<sup>5</sup> In their

critique of capitalism, they neglected the sociological meaning of “social mobility” and the new socio-professional wage earners. However, the new social reality emerging in Europe from the second half of the 20th century eventually required the expansion of the notion of the middle class, and “even those who denied its existence as a class were forced to acknowledge this issue of sociological reflection as an important contribution to the understanding of industrial societies and their transformation” (Estanque 2012a:111). The increased purchasing power of workers and the triumph of the welfare state in Europe, the proliferation of new professional groups linked to services and having high levels of qualification as well as the significant increase in new salaried sectors embody a new social reality that requires the construction of new theoretical tools to understand the phenomenon of social mobility. From the Marxists, there came studies that drew on complex conceptual developments and unprecedented methodological sophistication, for the first time combining theoretical thinking and empirical analysis of actual social realities (Estanque 2012b). As examples of such production, it is possible to refer to Louis Althusser et al. (1965), Nicos Poulantzas (1975) or Eric Olin Wright (1985). Beyond their specificities, these studies are even more united by the recurring critical approach to social mobility (generally subscribing to what is known as the theory of reproduction<sup>6</sup>) and by the negative perception of the middle class. Seen as a factor that reduces the power and demands of the workers, the middle class is characterized by several rather unflattering qualities: it is compliant, individualistic, careerist and consumerist. Around the same time, however, studies appeared that substantiated theoretical combinations and overcame the old oppositions, as “some of the most interesting contributions to the understanding of the phenomenon of the middle class in industrial societies come from thinkers whose process was guided to a link between . . . Marxism and Weberianism” (Estanque 2012a:118). Basically, these studies reflect the need to address the distribution of various kinds of resources—economic resources but also resources of social capital and education—and pay more heed to symbolic and ideological dimensions (Erikson and Goldthorpe 1992; Parkin 1971, 1979). That is to say, although they recognize that work and the economic sphere produce major constraints for social actors, at the same time they recognize the need to meet other indicators. Actors can be seen as occupying particular positions in the social structure, but their actions, choices and representations cannot be forecast automatically given this structural positioning. The values and representations of the middle class are not immuta-

ble, nor do they reflect any essence intrinsic to it. Social relations and conflicts need to be seen in more plural terms, with greater attention being paid to their political and symbolic dimensions.

As Pierre Bourdieu (1972), Michael Burawoy (1979) and Anthony Giddens (1984) would say, although social reality can be fully grasped only with the help of theory, this matters only insofar as it can reveal and provide meaning to social practice. Faced with the undeniable trend of upward social mobility observed in industrialized societies, especially in Europe since the 1960s, the basic principle of a “theory of practice” advises and requires a broad rethinking of the phenomenon of the middle class. Its undisputed growth means that the issue is now at the core of contemporary sociology, while also highlighting the inadequacy of continuing to try and explain today’s capitalist society through a bipolar system of classes. In the wake of this theoretical reorientation, studies have appeared that try to access the symbolic and ideological dimensions of the life of the new middle class by considering its consumption choices and practices.<sup>7</sup> The best-known (and most renowned) study is without doubt *La Distinction*, by Bourdieu (1979), in which he advocates—in relation to the consumption of cultural goods—that social categories on the rise adopt the typical attitude of copying the habits of the elite, that is, the cultural goodwill of the middle class. A better example of such an approach is the study carried out by the team led by Mike Savage et al. (2008) on British society, whose structure and social stratification are presented via a model composed of three main classes (upper, middle and working). Here, the middle class is seen as embracing nearly a third of the population and comprising an amalgam of a range of social and occupational categories with many wage earners.<sup>8</sup> The study set out to clarify and understand the relations “between belonging to a social class and cultural participation” (Savage et al. 2008:1049). The study concluded that there is a culture and a *habitus* that typify the middle class, since, in addition to the diversity of occupations, particularly in services, what unites members of the middle class is their everyday consumption and cultural practices. In other words, their identity is constructed at the symbolic and cultural level.

Finally, it must be mentioned that, in the context of studies of the movements of the 1960s, the middle class was seen for the first time in terms of its active and transforming role. Such analyses establish a clear connection between the student movements of the 1960s and this social class, heralding the approach of what is known as “middle-class radicalism” (Barker 2008; Crossley 2003; Parkin 1968). However, in the last two decades but particularly at the beginning of the 21st century, the middle

class and social mobility gained added significance as a topic of sociological reflection for very different reasons: upward social mobility suffered clear setbacks, while the stability and security of the middle class appeared strongly threatened. The decline of the welfare state, changes in the labour field with the advance of Toyotism and, finally, the “financial crisis” are producing devastating effects. The traditional heterogeneity of the middle class is now amplified, and there is a widening gap between its lower segments and the minority at the top. Segments that had previously achieved comfortable and supposedly stable positions have been touched by growing instability and generalized insecurity, while the minority at the top has become consolidated, enjoying purchasing power and influence beyond those of the other segments (Esping-Andersen 1993). At the turn of 21st century, growing inequalities, especially of income, became a recurring theme of sociological reflection (Stiglitz 2012). In Portugal, recent studies stress the tendencies toward a decline of the middle classes (Estanque 2012b) and the permanence of a society marked by deep divisions of class (Carmo 2010), as well as the intensification of inequalities in income distribution (Carmo 2013; Rodrigues 2011).

The purpose of the explanation in the preceding paragraphs was to provide an overview of the approaches (and controversies) relating to the middle class, thus allowing the main lines of its problematization to be identified and making it easier to grasp the guidelines of this research. I recognize the existence of the middle class as such, but also note that the economic and professional sphere has not been chosen as the central focus of analysis. The intention was not to discuss the “class positioning” of a group of actors or to consider the effects of it on their identities and values. Given their position as members of the new middle classes, the intention was to try to understand their values and representations by considering their consumption options and practices. Also, I draw attention to the anthropology of consumption (McCracken 1988; Miller 1987, 1998), where the consumption process of the actors has gained centrality in terms of analysis, and this process of consumption is seen as a cultural practice; that is, as a process of assigning meanings. Specifically, consumption is not limited to any act of purchasing but rather covers all the acts and decisions preceding and subsequent to the actual purchase; commodities are all the goods and services provided by the market. Through the consumption process, social actors remove commodities from impersonal establishments in which they originated and recontextualize them by means of specific appropriations. Viewed as a cultural practice, the process of consumption emerges as a potential medium of expression and

communication by which it is possible to access the value constructions and assignments of meanings by social actors.

Finally, there is a third point to be mentioned. This relates to the typology of social stratification chosen as a guide for defining the “middle-class” status of the informants. Here the research found key support in the work of the team of Almeida, Costa and Machado. These Portuguese sociologists have been studying the structural dynamics of class formation in Portuguese society since 1980 (Almeida, Machado and Costa 2006; Costa, Machado and Almeida 2007). Recognizing the need to address the interrelated fields of occupation, job status and value patterns, this team has proposed (after a series of versions) a model of social stratification comprising five classes: entrepreneurs and executives (C1), professionals and managers (C2), the self-employed (C3), routine employees (C4) and industrial workers (C5) (Almeida, Machado and Costa 2006). The middle class as a whole is perceived as embracing classes C2, C3 and C4, and these sociologists argue for a “middle-class culture,” given that cultural and ideological affinities between those three categories can be seen.

Taking the work of Almeida, Costa and Machado as my reference point, a group of 24 households formed its empirical sample. These were chosen because their members belonged to the middle class according to the classification adopted and they met the additional condition that they had a clear link with the urban setting in terms of where they live and what their lifestyle is. The intention was to constitute an exclusively urban “middle class” to enhance our access to households of the new, predominantly urban middle classes. Making use of the terminology of Almeida, Machado and Costa (2006), we can say that the 24 households are regarded as belonging to the three subcategories of the middle class as follows: C2, professionals and managers (7 households); C3, the self-employed (6 households); and C4, routine employees (11 households).<sup>9</sup>

### **A Recently Expanding and Shaky Social Class**

Approaching consumption as a cultural practice has the significant merit of granting access to the cultural/moral interpretations and valuations underlying consumption practices. These and all constitutive consumer items serve as material support to the objectification of ideas, values and projects that we seek to understand. If we examine the “middle-class” status of informants, both the recent expansion of the middle class and its strong tendency to be simply *remediado* (its undeniable weak-

ness, particularly financial) can be confirmed.<sup>10</sup> This tendency manifests itself in multiple contexts and routines of the households’ everyday life. To clarify the meaning of the statement, the general absence of inherited property should be noted, for instance.

There may be a temptation to emphasize a general movement away from material misery that occurred from the 1970s onward, given the widespread rate of ownership of the family home (around 70 per cent)—a tendency that, in fact, runs throughout Portuguese society (Barreto 2002). One should also note the tendency, equally widespread, that the family home was acquired by its current owners through a bank loan and not inherited from previous generations. The financial effort involved in buying a home should also be borne in mind because the monthly mortgage often takes one-third to one-half of the family income.<sup>11</sup> But if we are looking at movable property, then we also have to note the almost total absence of inherited property. Among the informants, inherited items amounted to some odd pieces of crockery and cutlery, some watches and an oratory, and one exceptional, because unique, instance of a set of dining room furniture. This panorama—so far removed from that described by Beatrix Le Wita (1985) in relation to Parisian bourgeois families, for whom family memory is nourished by interwoven narratives stretching back in time through the handing down of houses, furniture and sundry objects through the generations—is not explained by any lesser interest in family memory. Rather, it is explained by the widespread absence, until the current generation, of significant material assets. Among the new middle classes, the general lack of inherited property is an indirect illustration, also generalized, of the very recent possibility of achieving a level of economic well-being able to support the purchase of durable goods and their transmission between generations. The plausibility of this interpretation is reinforced by the fact that some of the households had recently moved out of their family homes, quickly proceeding to buy new ones thanks to their improved material circumstances. This not only shows the perception of change relative to previous generations in terms of comfort but also illustrates the impossibility of keeping two houses.

The *remediado* nature of middle-class Portuguese and their only recently achieved correlative capacity to buy durable or socially prestigious goods can be illustrated almost paradigmatically through the enthusiasm for purchasing *Vista Alegre china*, in particular dinnerware, acquired gradually with a prolonged effort. The absence of these inherited objects is symptomatic of the parsimony prevalent in previous generations. At the

same time, it is interesting to note that households show a new interest in such goods and actually make an effort to buy them, which strongly suggests that such objects will become someone's inheritance.<sup>12</sup>

Looking at other consumption domains, the same tendency for the *remediado* seemed to be especially demonstrated through the consideration of "recreation and culture." Here, the analysis concerns the activities and assets that households and their individual members use to organize and enjoy their leisure/spare time, defined as those periods not spent working or doing routine chores. It is clear that holidays should not be seen as a trivial habit, if the term is assumed to mean time spent away from home, not just the legally defined period when people are not expected to work. In the study sample, the established practice of regular holidays emerged as the key indicator separating the less *remediado* households from the others. For these latter households, holidays, with sporadic recreational programs, are only occasional or are enjoyed without leaving home. Of course, it is reasonable and legitimate to establish a connection between the type of holidays taken and changes in the relevant disposable incomes, with actually taking holidays being symptomatic of at least some financial freedom, especially if holiday locations are far away and trips are repeated throughout the year. However, this interpretation should not hide the intervention of other areas related to the very novelty of the possibility of holidays and their connection with issues of normative sensibilities and mindsets, rooted in a particular family lifestyle. Beyond the financial constraints (the effects of which could be decisive), the non-universality of holidays also betrayed the relatively recent introduction of this habit in some of the households. What I mean is that some households took vacations only occasionally or quite simply did not take them at all, not only because they had been almost financially impossible at the time, but also because, since the opportunity had arisen only recently, it had not yet been assimilated into any routine. Some older people, especially, did not take regular holidays because this was not part of their normative sensibilities, not part of their lifestyle. People 65 years old or older had lived a significant part of their lives before 1974 and, therefore, without the right to holidays or other social benefits. There were also households who had never taken holidays because, quite simply, the expenditure and, in particular, the relevant holiday allowance were needed for other higher-priority purposes, from balancing the family budget to decorating the house, often also including some investment in their children's needs.

The same mix of financial weakness and a recurring pattern of normative sensibilities—not just the potential

heavy financial burden—was felt equally with respect to other forms of leisure that tended to be highly under-represented in the households studied. Of the three forms of leisure identified, the magnitude of what I have called *leisure at home* should be stressed. It typically involved staying in the family home, where, in addition to resting, the most popular evening and weekend pastime is getting together to watch television. This is basically a form of family leisure that presupposes that their respective homes are equipped with the essential audiovisual appliances as well as the accessories needed to access encrypted television channels and obtain a variety of films.

The incidence of what I have called *cultural leisure*, on the other hand, involved going to various shows or buying goods such as books, newspapers and recordings of diverse origin, was generically low. In terms of cultural leisure, the explanation of analytical patterns is especially difficult because, except for going to the cinema, which was almost universal, the incidence of other manifestations and, in particular, the importance claimed for them by the people themselves were confined to a very small number of informants and households. For example, at least one member of every household occasionally went to the theatre, but only two or three households did so regularly, endorsing the formula of demand for cultural consumption. As for the habits of reading and listening to music, it was ascertained that their consumption reached a somewhat broader range but still a minority of informants. A comprehensive interpretation of the material available shows that we are looking at family contexts that did not really support lifestyles geared toward the appreciation of cultural consumption.<sup>13</sup>

The third type of leisure activities identified, which I have called *fun leisure* or *going-out* culture, relies on conviviality typically based on regular meetings "out of the house" in eating places or nightlife venues. In this case, the central analytical recurrence concerns the fact that this form of leisure confined to a group of informants under 35 years old, who are already in independent households but have no children, or who are not yet independent of their parents' households. The under-35s' fun leisure typically involved going out with friends to places of entertainment and conviviality and may or may not have included a trip to a restaurant. It is important to draw attention to the distinctive nature of this way of using restaurants since, in this case, going to a restaurant was above all a chance to meet peers, with whom a group identity is forged (Costa 2003), basically characterized by the correlative absence of conviviality of a more strictly family nature. The fun leisure of the under-35s is an interesting topic because it lets us see the



growing gap between the generations in terms of sociability behaviours and related consumption practices. Among the under-35s, we should note the dynamism of their friendship networks and their recurring gathering in public places (very often nocturnal) with “friends,” which is elevated to a significant category in terms of their sociability and consumption practices. Older people’s contexts of sociability, on the other hand, have very little impact on friendship networks, which tend not to be materialized in sharing a meal or exchanging gifts. Expressing the adoption of new practices of sociability and consumption, the fun leisure of the under-35s is also an indicator of the different conditions of life that the older generations endured, when their efforts at restraint did not let them enjoy a generalized exchange of pleasantries with a circle of friends.<sup>14</sup>

### **Splits between the Generations of Parents and Children**

Considering the “middle-class” informants, there is a set of variables whose incidence clearly differs according to generation. These variables enable us to broadly understand some of the new norms characterizing the middle class, as well as the meanings underlying them. One compelling fact about the new middle classes is the significant gap between the under-35s and the older generation in terms of educational level. While older people have lower formal educational qualifications, very often having only completed compulsory education, higher educational qualifications or positive expectations of gaining them are virtually universal for young people today. Reproducing to some extent the effects of universalizing the education system and the opportunities made possible by socio-economic changes in Portugal after 1974, this trend is also an indirect display of the role of formal education as a source of social reconfiguration. In Portugal, as in other European societies, formal education is an important channel for upward social mobility. However, for these social actors, it is still paradoxical (or a caricature) that achievement of the goals of education is, in the current context, concomitant with high unemployment or underemployment. The generalized access to the university by the younger generations has contributed to what Daniel Bertaux (1977) called “the mirage of social mobility” by way of qualification. However, the truth is that increasing numbers of highly qualified professionals are being pushed into unemployment, into performing routine work that is very badly paid and into emigration (Ramos 2013). Contrary to all their expectations, the new middle classes are experiencing firsthand what it means to be deceived by the ideal of meritocracy, and this feeling is all the

stronger in those with more limited social capital resources. But, apart from all the uncertainties, their hopes essentially still rest in obtaining an academic degree, which is also symptomatic of the underlying symbolic valuation.

Another divisive split in line with the trends that contrast the older generation with the under-35s is their respective models of sociability and the corresponding inclusion/exclusion of friends as a significant socio-affective category. As an objectification of the idea of family, the house is fundamental to everyone as the material support of the “home,” and significant amounts of attention, work and financial and symbolic investment are lavished on it. Nearly all of the research respondents’ homes have quite appreciable levels of comfort. Informants live in houses of various types, from modest apartments or apartments that are part of housing cooperatives to private condominiums in duplexes or triplexes, to individual houses. In all cases, the general living conditions were good, and the houses were equipped with the usual home appliances and the audiovisual appliances of leisure. But the actual space of the house, rather than being designed to accommodate social contacts of friendship or neighbourliness and exchanges of hospitality, in fact serves mainly for the enjoyment of family sociability, often restricted to the members of the household. Even though buying and maintaining a family home absorbs sizable and ongoing efforts (including financial ones), these efforts are far from supported by the habit of opening the house to people other than close relatives. It seems clear that the house is both the physical and metaphorical representation of the household that lives in it, and, as such, it is an important focus of attention. But, at the same time, the efforts materialized there are hardly of a public nature or shown to the outside world. Consistent with this pattern, in addition to the daily, functional sharing of meals by household members, the house tends to host only occasional festive family table-sharing, whose scope extends only to include some close relatives in a gathering to celebrate their birthdays.<sup>15</sup> Overall, we can say that the act of “having friends over at home” does not form part of the normal routines of these households. The model of sociability of the over-35s has a perceptible tendency to be marked by a very low incidence of networks of friends and neighbours, and these are diluted even more when the focus involves exchanging hospitality, meals and gifts.

But for the under-35s, we find a new model of sociability that, while still not involving opening the house to extra-familial sociability, nonetheless tends to embody friends as a significant socio-affective category with whom

they meet up to share activities outside the house, particularly in eating places and entertainment venues, and to exchange gifts. In this case, besides joining in the fun leisure mentioned above, the uncommon practice—entirely missing in the older age group—of celebrating birthdays with friends through a festive meal in a restaurant where everyone pays for themselves has become commonplace. The explicit argument for (and not the mere acceptance of) this type of birthday party with friends—where invitations mean that the birthday person wants the other person to be there but does not intend to, or feel obliged to, pay for the whole dinner—reflects the adoption of a new guideline in terms of sociability. Through this it is possible to satisfy the wishes of the group of friends, without which, after all, the burden of work or money would be excessively increased.

This scenario has three facets: the exceptional character of including friends in domestic sociability, the differing behaviours of the generations and the new patterns of sociability of the under-35s. All these confirm both the very recent general improvement in material living conditions that allows some courtesy social relationships and the implicit instability and weakness that make any real consolidation of these recently established new norms most unlikely.

### Descendants as the Main Family Project

Another trend that strongly characterizes the new middle classes is the *glorification of descendants*, in which the common perception of children as a means of the future continuation of the parents is superseded by a view of them as the mainstay of deeply rooted family values.<sup>16</sup> The moral economy of the home, which tends to suppress and control any source of excessively personal desire by making it defer to broader family projects, is itself very focused on the children, who seem to play a central role in the objectification of the very idea of family. Descendants tend to be elevated to the main family project, able to mould the lifestyle of the household as well as their consumption choices.

Although the category of children that embodies this tendency covers descendants of all ages, young people approaching adulthood are, par excellence, the catalysts of family projects—and, as such, are rightly seen as legitimate beneficiaries of spending and consumption decisions especially centred on them. As they near the end of secondary school and for a few years afterward, children gain an undeniable prominence in terms of family plans and their ultimate goals. Respondents' consideration of this topic highlights some relevant analytical patterns. First, the prospect that children will obtain higher education and even complete university

courses is a target of considerable emotional investment, albeit clearly related to both the recent but as yet small rise in the level of education in Portuguese society and to the significant education gap, already noted, between parents and children. Afterward, this emotional investment provides the necessary endorsement of the financial investment in children that is assumed to be essential because underlying both is the agreement on the expected change in various patterns of behaviour, including the use of certain new goods and services. Fully aware that having children reach higher education involves, or will come to involve, substantial additional expenditure for the household, the family accepts this prospect as a fact that needs to be discussed only in order to find solutions that help to achieve it.<sup>17</sup>

In addition to staunchly sticking to the project of providing their children with higher education, parents still define as a duty the provision of other types of support that are equally demanding in terms of family options. For example, providing children with a variety of tourist experiences, or enabling them to take a “final course trip” to the other side of the world, can result in a sacrifice in which a household goes without holidays or even stops this previous household practice altogether.<sup>18</sup> This form of “family containment” that, in practice, is largely expressed in parental abdication in favour of their children is normally experienced and fulfilled without any drama or deep regret. Quite the opposite. And the same logic can be extended to many other areas, such as the ambition to provide children with a car or significant financial help to buy their own family home. The substantial material and utilitarian scope of help given to young adults by their households tends to last beyond their entry into working life, especially when, despite this autonomy factor, these young adults still live with their parents.<sup>19</sup> In these situations, repeated over and over again, younger members do not contribute financially to household expenses; with regard to individual consumption activities, these tend to be confined to matters of personal appearance, although not always entirely, and to leisure activities.

Bearing in mind the range of facets involved in this glorification of descendants, as well as the depth of these efforts, the very identity of the parents and the household is closely linked to the financial and emotional investment made in children. The goals set and the resources shared and expended for the children become the very ways and means of expressing identity, both for parents and for the household as a whole. Particularly when the outlined goals are achieved, the children become the people with regard to whom the household plans and their ultimate goals are strategi-



cally considered. This central role of the descendants in shaping the very concept of household and the household profile shows the children's marked capacity for socialization in relation to their parents. The new preferences and practices engaged in by descendants, especially these young adults—and increasingly so as they successfully consolidate their entry into adulthood—reveal a remarkable capacity for socialization, with effects that are manifested in the adherence to new normativities and new consumption patterns. This rebound effect occurs in matters as prosaic as introducing new eating habits into the household or as subtle as generating new sensibilities. In the situations I observed, the socializing performance of the descendants takes forms where the rebound metaphor is especially evocative, as in the case of a change of perception of books from a mainly instrumental category to a more general source of leisure-time enjoyment and reflection. The widespread emphasis on the importance of education and parental efforts to encourage a “liking for study” in their children usually involve the appreciation of books and other educational materials that are, however, essentially equivalent to teaching tools. Under the socializing influence of descendants, this more instrumental perception may be extended to embrace fiction and poetry, through which the importance of books and reading may be redefined: they become regarded as recreational resources and vehicles of more general reflection.

In relation to household consumption practices, the glorification of descendants is particularly reflected in the essential recurrence of consumer options being justifiably assessed as disjointed with respect to the two generations present in the household. The choice of the children as the main family project, and the correlative identity dynamics centred on them, leads to the interesting development of different standards of assessment for consumption being adopted by parents and children. This position is manifested through matters as varied as whether or not one visits specialty stores and purchases branded products, whether or not one recognizes the need for or relevance of a particular good or service or whether the mechanism of “family containment” is triggered, which basically amounts to abdication in favour of the children. This behaviour illustrates quite well that the distinction between “luxury” and “necessity” never results from the simple price valuation or functionality of an item but depends, first and foremost, on who is the recipient. At the same time, it should be remembered that this setting of different exacting standards for the consumer items purchased, or even the mere recognition that certain consumption practices may exist,

is a trend that is not confined to more personal consumption but also seems to be repeated with respect to household holidays, which can be surrendered to meet the expectations of children as a priority.

In conclusion, it is thus fitting to note that the financial investment made in the children does not only defray all of the costs of their education and training, but it also serves to support any new consumption practices and their correlative disjointed requirements, whose adoption is based on them being seen as especially appropriate or consistent with the status of the children's new educational condition. When one looks at the emotional investment these households make in that whole process, it is not hard to understand that the current feeling of having been disappointed in many of their most intimate and cherished expectations has profound and overwhelming implications that affect the very core of their identity construction.

### When the Cuts Affect Food

Cases of households whose budget constraints forced them to extend cuts to the *food domain* were the exception at the time of the study. However, consideration of the question makes it possible to explain another more radical aspect of the remediated tendency of Portugal's new middle classes and the critical effects produced by weak and rickety material resources on issues of identity.<sup>20</sup>

Within the study sample, beyond the far-reaching financial insecurity that extended to a significant proportion of the households considered,<sup>21</sup> it was possible to single out three households that were struggling with budgetary constraints not experienced by the other households. Common to the households in question was that unemployment or subsequent precarious employment had affected one of the spouses, specifically the wife. Owing to the decrease in the family's disposable income caused by this, their spending considerations and corresponding adoption of saving strategies and “cuts” had affected food decisions.

A downward trend in the importance of food in household consumption patterns is a general indicator of improving economic conditions, as it reveals the appearance or increase of expenses other than those for strict food-related survival. Thus, developed countries have seen a regular decrease in relative spending on food. In the specific case of the three households in the study, the context of the financial crisis they were experiencing showed exactly the opposite trend in spending; household and other grocery shopping accounted for a disproportionate share of the total available budget.

For these households, the proportion allocated to food was one-third or nearly one-third of their disposable income.<sup>22</sup> At the level of their consumption practices, this financial outlook is particularly reflected in the near-zero rate of utilization of services, whether those of dry cleaners, tradesmen for home repairs or a hairdresser. At the same time, the extent and steadiness of routines related to the regular supply of food to the household become hugely relevant. As for the other households, supply mostly relied on supermarkets, but, in this case, various hypermarkets became the regular shopping places because each had its own advantages with respect to different goods. Shopping trips were usually governed by the need to restock and the availability of funds, but in these households they were split to take advantage of any bargains. Moreover, whereas for the other households the domain of food consumption seemed to be untouched by occasional adverse financial contingencies, these households extended their efforts to contain spending on food. In this regard, it should be noted that the study did not confirm the conclusions reached by Alain Bayet et al. (1991) that changes in income do not have a significant influence on everyday provisions, food and daily expenses. For the households concerned, their cuts in consumption also cover food spending—the purchase of yogurt is reduced or stopped, a different brand of cheese is chosen and fewer meals contained meat.

In addition, for these households an extra or more indulgent consumption choice tended to occur in the domain of food, for example, a trip to a restaurant, a particular type of meat or a special dessert for Sunday lunch at home. Obviously, we are not looking at especially greedy or demanding households but rather at families in which, given the budget constraints, the other areas of consumption are very restricted; therefore, not only are the “excesses” a slightly less frugal meal, but these are the only “excesses” that remain to be suppressed when belts have to be tightened even more. In the case of one of these households, its blatant, permanent self-restraint made approaching the household consumption habits and patterns a painful topic in that it forced its members—again, and now with a third party—to face up to the existing financial constraints.

In analytical terms, this entire situation highlights how relevant and plausible the suggestion is that budget difficulties may produce critical effects at the level of identity issues. If the relationships between people and consumables merit consideration as significant parts of the processes of construction and expression of personal identities, the impossibility of owning certain goods—or

the severe reduction of that possibility—should not be read as a loss or difficulty in terms of mere material resources. The personal or familiar inability to acquire certain consumer items may mean, in terms of identity construction, a much deeper disaster. Not having the economic clout to consume what is seen as “the minimum” can mean being condemned to the denial of a significant part of life. The impossibility of achieving aspirations construed as absolutely legitimate—which include consumption demands as prosaic as being able to ensure a complete meal that the whole family likes—cannot fail to unleash negative effects in terms of identity.

## Final Remarks

In 1835 Alexis de Tocqueville, in his work *Democracy in America*, saw the middle class as the key to strengthening the democratic order (Tocqueville 2000). Estanque (2012b), following a similar line of thought, stresses the central role that the middle classes can play in social cohesion and societal transformation. I have endorsed that same position in this article. The continuous, consistent growth of the middle class is an added value to the society that shelters it. The expansion of the middle class as it occurred in Europe from the second half of the 20th century, on has led to an overall rise in people’s living conditions, an increase in their levels of comfort and safety and an improvement in their educational and vocational qualifications. It seems to me completely legitimate to assume that Portuguese society has the ambition of achieving such social changes. The problem we should be aware of is that, in Portugal, the growth of the middle class happened much later than in the rest of western Europe. For various reasons that are, however, all linked to the dictatorship that ruled until 1974, it is not until the 1970s and 1980s that we see any significant expansion of the new urban middle classes related to services. However, this tendency toward upward social mobility, still very recent, is already facing real threats and setbacks. In other words, in the present context it is quite clear how short a life these Portuguese middle classes seem doomed to enjoy.

The methodology adopted, with its optimized link between ethnography and in-depth interviews, allowed achieving a contextual understanding of the respondents and their households. The effective rapprochement with the people’s daily lives and the routines by which consumer goods were incorporated into them made it possible to access the meaning of the subtler decisions made by households. It was possible to understand not only the sense of valuations and ambitions of households but also all the efforts and struggles undertaken so that

their life projects, as members of the middle class, do not become moribund or even dead projects. As a whole, the data assembled and analyzed here are in line with the latest studies about the middle classes and social mobility in Portuguese society. These studies have demonstrated that Portuguese society has deep class divisions, showing a stark polarization between a very tiny elite and a huge mass of people who make up the base of the new middle classes (Carmo 2013). In this stratified Portuguese society, upward social mobility seems to become more and more a mirage, and the incomes of the middle class reveal a scary thinness (Cantante 2013; Estanque 2012b). This material provides new details for the recognition that Portugal is a “society of classes unable to break their structural dualism and its profound social antagonisms” (Carmo 2013:27).

The 2010 OECD Report confirms beyond any doubt that social inequalities are still very marked in Portugal and that the socio-economic situation of the birth family has strong effects on individuals’ disposable income. For 2010, the Eurostat data also confirm that, on average and in comparative terms, the economic resources of the middle classes in Portugal continue to be lower than those of the European Union member states. On the other hand, the intensification of the economic crisis and the austerity measures imposed by the current government can only deepen these inequalities and bring down people’s last positive expectations. National and international transformations in the economic and labour domains, the obstacles raised to maintaining the welfare state that was initiated such a short time ago and the current crisis are rocking the fragile stability of the Portuguese middle class. The final shove into a fall will have been the austerity measures and budget cuts imposed by the current government and overseen by the troika consisting of the European Commission, European Central Bank and International Monetary Fund, in the wake of a request for international aid by the Portuguese government on April 7, 2011.

Meanwhile, Portuguese social mobility trends (upward or downward) have not been the subject of enough academic attention. The late expansion of the middle class and its incipient consolidation in the 1980s and 1990s, as well as the current trend of blocking the middle class and the related deterioration of its living conditions through the reduction in disposable income, are two processes that, until a very short while ago, had been pretty much disregarded, particularly in terms of their more subjective dimensions. Hence, choosing the middle class as a social space for analysis and looking at it via focusing on consumption as a cultural practice is

indeed pertinent. Through these means it has been possible to provide empirical evidence on some of the main social dynamics operating today in Portuguese society. Accessing the values and representations of the actors is an essential task when the goal is to understand the subjective dimensions of their lives.

The essentially qualitative content of the empirical material considered and the interpretation produced, which deliberately does not stop with the identification of structural regularities, has made it possible to achieve a kind of portrait of the new Portuguese middle classes. Some normative patterns and benchmarks may be taken from it. From their collective characterization as a social group, there emerge not exactly traces of the hedonism or spending touted by some in the media, but, above all, a picture that confirms their very recent expansion and an undeniable weakness, particularly financially. The *remediado* tone emerges as the dominant trait of the new Portuguese middle classes, with households in our study showing instability, insecurity and precariousness. The conspicuously shaky character of the living conditions of these households leaves little room for doubt that the real threat of the *remediado* tone can swiftly slide into open poverty. Given the current climate of crisis, and all that this crisis has justified in terms of policy options, there seems no alternative but to recognize the looming danger that the new middle classes will fall victim to downward social mobility. This decline and, thus, their too-short lifespan appear to be certain. The proposal by Machado and Costa (1998) that the middle class in Portugal accounted for 47.3 per cent of the active population in 1991 and their forecast that it would grow by 10 per cent per decade are not confirmed. Neither the new forms of work organization and related increases in insecurity and unemployment nor the policies of budget restraint undertaken by the government indicate this. It is more likely that Portugal will, once again, witness the postponement—who knows until when—of a positive consolidation of the middle class, which is something that has been occurring elsewhere in Europe since the 1960s.

The only avenue of hope is perhaps the possibility that the end of all expectations of stability and upward mobility will have a practical impact in the political field, increasing the claims of these people. According to José Maria Maravall (1972), a very high intensity of social frustration can have this effect. The idea that the middle classes tend to contribute to social peace, presenting themselves as the “damping zone of social conflicts” (Estanque 2012b:43), can become meaningless if what these middle classes have to lose is very little or nothing.

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## Notes

- 1 The following are major outputs arising from the research in question: *Experiências de Consumo. Estudos de Caso no Interior da Classe Média* [Consumption experiences: Case studies among the middle class] (Duarte 2009) and *O Consumo para os Outros. Os Presentes como Linguagem de Sociabilidade* [Consumption for others: Gifts as a language of sociability] (Duarte 2011).
- 2 The intention was not, therefore, to grant the existence of a “middle-class culture” (along the lines of Savage et al. 2008) or to consider the role of “cultural consumption” as a mechanism of social differentiation or reproduction of dominance (along the lines of Bourdieu 1979).
- 3 Still, I would draw attention to the fact that some trends relating to the “ethnographic present” may seem strange because they are already a long way from what the same households today could afford.
- 4 In the works of Marx, such as *The Communist Manifesto* (1848) and *The Eighteenth Brumaire of Louis Napoleon* (1852), it is possible to detect two very different conceptions of social class. However, the typology of classes most known and most strongly identified with the Marxist position is that of the *Manifesto*, which posits the polarization between bourgeoisie and proletariat.
- 5 Another option is to use the expression “the so-called middle class,” through which Marxists try to convey that they still do not subscribe to the idea that there is a middle class.
- 6 The theory of reproduction was proposed by Pierre Bourdieu and Jean Claude Passeron (1970) for the cross-comparison of formal education and social mobility. The emphasis was on the reproductive capacity of the educational system as a medium for spreading the dominant culture, which would lead to the reproduction of the established social system, with the educated (even those not from the bourgeoisie) joining it.
- 7 In a terminology kept close to the Marxist legacy, these non-economic aspects are designated as “subjective dimensions,” as opposed to the “objective dimension” of “class positioning.”
- 8 Simply for linguistic convenience the term *middle class* is used in this article in the singular. It is established at the outset of all the controversy that the middle class internally comprises a number of subdivisions, which have increased with the appearance of the new middle classes.
- 9 A systematic presentation of the data on the households in the research sample can be found in Duarte 2009:102–103.
- 10 Of course, given the internal heterogeneity of the research sample, there are substantial differences in terms of either the disposable income or the dominant types of capital. But these are mainly differences of degree, over which there is an identical *weakness characterizing* the majority of households.
- 11 This is amply proved by the current rise in defaults on mortgages and bank loans.
- 12 The Vista Alegre brand actually achieved a paradigmatic resonance through the number of households who adopted this behaviour. While this cannot be proved, since I did not make contact with the informants again, this is a situation where it is legitimate to assume that the reported “ethnographic present” is out of step with actual behaviour.
- 13 It should be explained that, together with the reduced incidence of cultural leisure, we find some informants—mostly individuals rather than households as a whole—who particularly valued goods such as books and musical and artistic media. In these cases, the personal identity of each subject was mostly formed and defined by the relevant cultural consumption that complemented their identity, prompting distinctly positive assessments even when this happened in the home. But these cases were clearly unusual.
- 14 The practice described as the fun leisure of the under-35s is another situation which it is legitimate to suppose has changed in the context of the current crisis.
- 15 The festive character of these meetings tends to cover little more than some exceptional dishes offered along with the birthday cake and a glass of champagne, and this shared occasion in fact provides the symbolic and ritualistic meaning of the event.
- 16 I do not wish to argue that the importance of descendants for a family and the expectations resting on them are uniquely middle-class attitudes. But it so happens that the survey had to make the “descendants” an area of special observation given the central role they could play in objectifying the very idea of the household and defining their projects.
- 17 For a considerable number of cases in the sample, the emotional and financial investment underlying the valuation of formal education justified using private universities and paying the relevant monthly fee. The study of the impact of private higher education on the exponential increase in the levels of schooling in Portuguese society is a topic of some analytical relevance.
- 18 The commitment of households to enabling their children to fulfil holiday projects gives quite an accurate insight into the pivotal role played by the regular enjoyment of holidays in the internal subdivision of Portugal’s middle class.
- 19 In January 2014 the Portuguese media were constantly discussing the dramatic but recurrent issue of unemployed homeless householders who found themselves having to go back to living with their parents.
- 20 In addition, the current context of an ever-worsening financial crisis makes us think that the prediction that identical situations may now spread to other households is not an exaggeration.
- 21 One can say that the weak availability of material resources extended to almost all 11 households of routine employees (C4) and even some of the six households of the self-employed (C3).
- 22 In the three households, about one-third of family income was spent on repaying bank loans that were relatively modest; in two cases they were mortgage payments, and in the other it was for the family car.

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