



Creating the Historical Sample of Portugal on Social Mobility (1860-1960)

The HSP-SM and the study of social mobility in Portugal in historical perspective

Social mobility has been an object of a fragmented knowledge and a theme neglected by the Portuguese historiography, although it is one of the central issues of the social history in the last three decades. On the other hand, the emphasis given to the migration studies in the last two centuries during the transatlantic cycle and during the European cycle, carries with it, explicitly or implicitly, the image of Portugal as a "closed" society, or even "blocked", which is an essential feature of its historical "exceptionalism", being its roots in a "failed" liberal revolution. The project *Explorations on Social Mobility in Portugal (1860-1960)* is engaged in the debate about the building of the European(s) society(ies) "from below" and explores three fundamental dimensions of the intergenerational social mobility phenomena in Portugal in historical perspective: (a) of the social opportunities in urban context; (b) of the social mobility in gender perspective (through marriage) and the determination of the "class frontiers"; (c) of the relationships between migrations and occupational and social mobility.

The Historical Sample of Portugal on Social Mobility (HSP-SM) is a longitudinal database created for the extensive study of social stratification and social mobility in Portugal in historical perspective. The HSP-SM is a cumulative scientific output of two research projects in this field based in NICPRI, University of Évora (Portugal), that used the same methodological framework and research agenda. The first one, entitled *Social Mobility in Portugal during the 19th and 20th Centuries. An Historical Study (1850-1960)* [FCT: POCTI/HAR/60284/2004] took place from 2005 to 2008 (PI Helder Adegar Fonseca) and the second one, *Explorations on Social Mobility in Portugal (1860-1960)* [PTDC/HIS-HIS/110827/2009] started in March of 2011 and ends in August 2013 (PI Paulo Eduardo Guimarães). Both projects were funded by the Portuguese Science Foundation (FCT) and put together a team of Portuguese scholars from different universities and research units.

The HSP-SM provides data about of individuals present in marriage records, namely of the occupations and status titles they used, their civil status (single, married, widow or divorced, after 1910), legitimacy, age (only for bridegrooms), residence and place of birth and their social role in those marriage contracts (witnesses or godparents, bridegrooms parents and grooms). Although HSP-SM gathered individual data, no names has been transcript due to legal impediments related to privacy and data protection. The team used a methodology in the gathering and analysis of data already established in the field, which stands on the codification of the occupations accordingly the Hisco and Hisclass scheme, being this operation essential to socially localize the individuals across time and space.

Choosing time cohorts

In order to compare populations in different historical periods and conjunctures, the period 1860 to 1960 was divided in nine three year cohorts (see table below). However, not every marriage register presented data suitable for social mobility analysis. The number of individual occupations and status titles recorded in marriages registers increases during the 19th century. Often they are less than 10 per cent in parish registers and less than 60 per cent after the implementation of the compulsory civil registration, after the Republican Revolution of October of 1910. The nobility titles disappeared for their public use were forbidden by law. Since 1957 the occupations of groom's parents cease to be recorded.

Time cohorts	Description
1860-1862	First Regeneração (I). Period of liberal peace and economic growth. Social and economic reforms. Investment in infrastructures (railways, bridges and roads).
1870-1872	First Regeneração (II). Period of liberal peace and economic growth.
1880-1882	Second Regeneração (III). Period of liberal peace and economic growth. Transatlantic mass migration.
1890-1892	Economic crises (State bankruptcy, abandon of the <i>Gold Standard</i> , agrarian protectionism) and political crises (nationalism, republicanism)
1900-1902	Economic recovery and growth of new exported oriented industries (cork manufactures and canned fish). Urban growth.
1911-1913	First Republic. Civil registration and social reforms. New peak in transatlantic migration.
1925-1927	First interwar cohort. Period of economic recovery after the crises of 1923. Limited emigration.
1935-1937	Second interwar cohort. Slow recovery after the 1930s crises. Corporatism, Catholicism and <i>New State</i> . Debate on "rural overpopulation" and growth of the rural population.
1955-1957	Industrialization, fast economic growth and urbanization (mostly limited to Lisbon and Oporto)

Choosing social and economic contexts

The table below shows the 12 municipalities chosen for the HSP-SM data collection, considering distinctive contextual variables during the period 1860 to 1960, namely, the Portuguese region they belong, the size of the population (in thousands, in December of 1900), predominant land property size and economy, the importance and type of trade and of industry, the rate of the urban growth, emigration and the presence of large foreign firms. For Lisbon and Oporto, the HSP-SM has only population of the "urban parishes".

Context	Region	Population (1900)	Land property predominant	Economy	Trade	Industry	Urbanization growth	Emigration	Large foreign firms
Oporto	North littoral	(168,0)	—	Commercial, industrial	Export oriented	Medium and small size	High	High	Yes
Viseu	Centre interior	54,0	Small, medium	Rural	Low	Low	Stagnant	High	No
Figueira da Foz	Centre littoral	43,0	Small, medium	Diversified	Low	Medium and small size	Medium	High	No
Covilhã	Centre interior	(12,4)	Small, medium	Industrial	Low	Textiles (wool centre)	Slow, high	Low	No
Lisbon	Estremadura	(356,0)	—	Urban and port city	High, import-export	Industrial centre	High	Medium	Yes
Barreiro	Estremadura	7,7	Large	Industrial	Low	Heavy industry	High	Low	No
Setúbal	Estremadura	35,9 (18,8)	Small, medium, large	Fishing industries	High	Canned fish, export oriented	Rapid growth and stagnation	Low	Yes
Évora	Alentejo	25,5 (12,4)	Large	Commercial agriculture	Medium	Low	Slow	Low	No
Faro	Algarve	(9,0)	Small	Rural	Low	Low	Stagnant	High	No
Ponta Delgada	Azores, São Miguel Island	15,9	Small	Commercial agriculture	Export oriented	Low	Slow	High	No
Ribeira Grande	Madeira Island	25,7	Small	Rural, commercial agriculture	Low	Workshops	Rural	High	No
Funchal	Madeira Island	17,4	Small	Commercial agriculture	Export oriented	Proto-industrial (embroidery)	Administrative and commercial	High (EUA and South Africa)	Yes

Distribution of the active population by economic sectors in 1930 in ten selected municipalities for the HSP-SM

Economic sectors	Figueira da Foz	Évora	Lisboa	Porto	Barreiro	Setúbal	Ponta Delgada	Ribeira Grande	Funchal
Agriculture	37,4	52,1	1,8	3,9	17,8	13,3	43,2	59,7	30,2
Fishing	9,3	0,0	0,5	0,3	0,9	30,8	3,3	3,7	1,3
Mining, salt and quarries	1,8	0,1	0,2	0,1	0,2	0,3	0,2	0,5	0,1
Industry and construction	15,6	14,3	25,5	31,2	32,5	25,5	12,6	12,1	19,7
Transport and communications	4,0	3,5	9,3	6,7	20,8	3,9	3,7	2,4	4,2
Trade	5,2	4,5	15,1	16,2	4,8	6,9	6,2	4,4	11,3
Armed forces	1,8	4,9	7,1	4,1	2,5	2,0	1,5	0,1	1,7
Public administration	1,3	2,5	5,7	3,9	1,9	2,2	3,4	1,5	2,8
Professionals	1,1	1,9	3,7	4,3	0,6	2,0	1,8	0,6	2,3
Owners living from their income	2,9	1,8	2,6	2,8	1,0	1,5	5,3	5,1	2,6
Domestic servants	13,5	8,9	13,8	14,3	5,1	6,5	11,5	7,8	13,2
Occupation unknown	6,0	5,4	14,7	12,2	11,9	5,1	7,2	2,2	10,7
Total (= 100 per cent)	49,920	35,136	594,390	232,551	21,042	50,467	54,634	28,092	68,003

Sources: Instituto Nacional de Estatística, *Population Census of 1930* (our calculation)

Research Project: *Explorations on Social Mobility in Portugal (1860-1960)*, FCT: PTDC/HISHIS/110827/2009.

Location map of the municipalities chosen for the HSP-SM in the continent and in the Atlantic Islands.



Explorações sobre a mobilidade social em Portugal (1860-1960)

Este site destina-se a prestar informação pública sobre o projecto Explorações sobre a mobilidade social em Portugal (1860-1960). Referência FCT: PTDC/HISHIS/110827/2009. Este projecto tem o apoio financeiro da FCT (N.º 11205/2009) e é co-financiado pelo Fundo Europeu de Desenvolvimento Regional (FEDER) através do COMPETE e do Contrato de apoio operacional do Instituto Tecnológico e Laboratório de História da Universidade de Évora. Este projecto é liderado pelo Prof. Dr. Helder Adegar Fonseca e instituído no âmbito do Instituto de Mobilidade Social em Portugal durante os anos 19 e 20. Este site aloja ainda informação e recursos para a equipa enquanto durar o projecto.

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On the left: Homepage of the collaborative project *Explorations on Social Mobility in Portugal (1860-1960)* showing the participant institutions and sponsors. The Information System provides public information about the Project (in Portuguese), common resources, tools, and file archiving for the research team at <http://www.mobilidadesocial.uevora.pt>



Farmer's family group and the permanent and domestic workers in *Baixo Alentejo*, South of Portugal (c. 1906)

HSP-SM: size by context (current state)

Number of marriage records transcript in HSP-SM (Aug.2012) having information about the occupations of the bridegrooms and of their parents. With reference to the number of records before the civil registration (1911).

Contexts	Records	Bridegroom's father occupation	Bride's father occupation	Before 1911	State
Ponta Delgada	2592	1600	1724	411	Complete
Ribeira Grande	1386	1310	1308	276	Complete
Funchal	5490	3990	4283	494	Complete
Lisbon	7244	5656	5733	1286	Complete
Oporto	5697	5135	4153	—	In progress
Évora	4614	2088	2222	1405	Complete *
Setúbal	2602	1583	1537	183	Complete *
Barreiro	2661	964	1045	47	Complete *
Figueira da Foz	5148	3077	3134	619	Complete *
Viseu	1337	1337	1337	107	In progress
Covilhã	—	—	—	—	In progress
Faro	—	—	—	—	In progress
Sum	38771	26740	26476	4828	

* Task completed before 2008. Project FCT: POCTI/HAR/60284/2004 (PI Helder Fonseca).

Publications

- Helder Adegar FONSECA and Paulo Eduardo GUIMARÃES (2009), "Portugal e as Sociedades Europeias: Homogamia, fronteiras de classe e revolução sexual (1860-1960)", H.A. Fonseca and Luis Lobo Fernandes (eds.), *A Europa, Portugal e os Desafios da Globalização: Perspectivas Transdisciplinares*, Évora and Braga, NICPRI, 2010, pp.77-113. — N.º temático de *PERSPECTIVAS*, 4.
- Helder Adegar FONSECA and Paulo Eduardo GUIMARÃES (2009), "The Social Mobility in Portugal (1860-1960): Operative Issues and Trends", *Continuity and Change*, Volume 24, Special Issue 03, December 2009, pp 513-546.
- Helder Adegar FONSECA and Paulo Eduardo GUIMARÃES (2009), "A Mobilidade Social Intergeneracional em Portugal, 1957", Serrão, J. V.; Pinheiro, M.; Ferreira, M.F. (eds.), *Desenvolvimento Económico e Mudança Social*, Lisboa, ICS, 2009.