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THE SOCIOLOGY OF WORK AND THE WORK OF SOCIOLOGISTS IN PORTUGAL ¹

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Abstract

A propose for this article is to present information on the emergence of the knowledge field of sociology of work and labor studies in Portugal. The period of 1974-1984 produced an interesting bibliography in the fields of social stratification, labor conflicts and social history. However, and since the mid-1980s, significant changes have emerged. There took place an increased theoretical diversity and also there was a major preoccupation with the development of a more professional teaching of the discipline. At this time, the first graduated specialists in Sociology appeared in the labor market since 1980, working in municipalities, industrial firms, public health institutions, schools, or even in research and development (R&D) units. The Portuguese association in this field (APSIOT) organized many scientific meetings, debates with unionists, managers and politicians, beside the regular publication of review “Organizações e Trabalho” (Organization and Work) since 1989. It started the diffusion of a professional culture of sociologists who associate science and their occupation concerning themselves not only with scientific quality, but also with technical competence and social responsibility. At the same time, one could assist to the participation of sociologists in the social and organizational molding of new technologies in order to promote alternative production systems.

Keywords: sociology of work; labor studies; Portugal

JEL classification: A14; J00; J50; J80; Y80

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Introduction

The first 10 years of Democracy in Portugal (1974-1984) produced an interesting bibliography in the fields of social stratification, labor conflicts and social history. However, and since the mid-1980s, significant changes have emerged. They were manifested not only in the theoretical diversity but also in the preoccupation with the development of a more professional teaching of the discipline. At the same time, there was a growing wish for practical intervention, and an increase in the amount of research projects and publications. At this time, the first graduated specialists in Sociology appeared in the labor market since 1980, working in municipalities, industrial firms, public health institutions, schools, or even in research and development (R&D) units. In this process, was very important the creation of APSIOT - Portuguese Association for the Sociology of Industry, Organization and Work in 1984. This association has been organizing many scientific meetings, debates with unionists, managers and politicians, beside the regular publication of review “Organizações e Trabalho” (Organization and Work) since 1989.

New research practices are emerging entailing the collaboration with different social actors (entrepreneurs, trade unionists, government entities, local councils and so on) with the hope that the research results will influence the decisions of these social actors. We can speak of the emergency and diffusion of a professional culture of sociologists who associate Science and their occupation concerning themselves not only with scientific quality, but also with technical competence and social responsibility.

Some present challenges to Sociology of Work in Portugal are focused on the training of sociologists and other specialists who enter into the work sphere. Other challenges point the evolution of the international division of labor in the context of globalization and the analysis of the activity of the transnational firms in Portugal. Even the critical analysis of the ideology and practices of competitiveness knows an increased interest.

But this field of Sociology is also becoming in competition with other specialists who demand for themselves the same area of intervention. These are applying remedies of

social techniques proposed by the “management gurus”. At the same time, one can assist to the participation of sociologists in the social and organizational molding of new technologies in order to promote alternative production systems to computerized Taylorism. It is not compulsory, but the specialists in Sociology of Work agree that the participation in the revitalization of the economy and of social life is possible by promoting new work organization experiences, and not only describing organization models dominant in the modern industrialized systems.

1. BRIEF CHARACTERISATION OF THE EVOLUTION OF THE SOCIOLOGY OF WORK IN PORTUGAL

1.1. *The initial phase of the Sociology of Work (1974-1986)*

Portugal, as a member of the European Union, finds itself in this last decade in a specific and complex situation in which modernization implies post-industrial problems, without, however, having yet resolved problems connected to industrialization. And this variety of problems emerges in a context of increasing competition at the European and world levels.

In 74, a military uprising puts an end to a dictatorship held since 1936, where Salazar was the main personality. The context of 1974 was characterized by an increasing criticism from businessmen against the incapacity of the Portuguese economy to face the “modern times” issued from the integration in the European Free Trade Association framework, and the need to increase integration in the European market. The other characteristic is underlined by the insoluble colonial war in Africa where the mid-range militaries were more and more upset and visualizing an impossible military and political end to the warfare. A third characteristic of this mid-70’s period was the progressive labor movements more and more active. There were up and downs during the 60’s, but since the beginning of the new decade, strikes, labor conflicts, demonstrations, police and paramilitary aggressive actions, were a constant in the daily life in both urban and rural areas.

A last characteristic can be pointed out to the increasing activism of the student movements. This was evident since the major ‘69 national strike, influenced by the American anti-war movements and by the French May ‘68. But it was also influenced by the major probability that students had to integrate the military forces and become involved in the colonial war. These movements were affecting in the last years not only the university, but also the secondary schools youngsters.

Until 1974 the authoritarian regime found suspicious the few sociological activities held in Portugal and there was no University courses on Sociology. These years (60’s and mid-70’s) characterized the workforce emigration to France, as well as the academic emigration. Only in the mid-70s was the institutionalization of teaching of Sociology and research proceeded with (cf. Almeida: 1990).

After the “coup d’État”, the political instability led to a shift in the social conflict process: military officers (some conservative) led the new provisional governments with some political left wing leaders. The workers, with new political and civil conditions, could develop openly their demands (better salaries, rights expression, union organization inside the factories). The increase of conflictive situations (strikes, firms closing down, industrialists that, afraid, ran away to other countries with their assets) endured until the end of 1975. Since this year until mid ‘80, the political situation was determined by the development of a social democracy supported by deficient economic structures. During this period emerged some sociological studies, focused mostly on labor conflicts and union movements (Santos, Lima, Ferreira, 1978; Cristóvam, 1982).

The manufacturing industry, using normally the raw materials from the colonies, had to re-structure completely inside a world framework of economical crisis, since 1973. Many CEO's and property owners, with their alliances in the former regime, tried to escape to Brazil, Spain or other conservative regimes after 1974. In order to maintain a national firm structuring, the early governments (with the pressure of leftwing parties) started a process of nationalization. This process affected major companies in the steel industry, bank and insurance, cement and chemicals, transports and communications.

This process brought a new industrial leadership to the "front". This was composed either by military officers that developed an administrative career (or were second rank seniors), either by new political bureaucrats. This industrial leadership negotiated with IMF (under the government of Mário Soares) the conditions to support the economical re-structuring (privatization, end of the agrarian reform, lowering of wage levels, high inflation). The employment was rapidly reduced in agriculture (from around 1.3 million in 1974 to 0.9 in 1986) and increased in the service sector (from 3.7 to 4.1 million), while in industry the proportion of employment was maintained (around 34%), as it can be seen in the next table.

Employment (breakdown by activities), 1973-86, unit: 1,000

| Years | Sectors | | | | | | Total |
|-------|---------------|------|--------------|------|--------------|------|-------|
| | 1 agriculture | | 2-5 industry | | 6-0 services | | |
| | No. | % | No. | % | No. | % | |
| 1973 | 893 | 27.0 | 1137 | 34.4 | 1273 | 38.5 | 3303 |
| 1974 | 1289 | 34.9 | 1247 | 33.8 | 1158 | 31.3 | 3694 |
| 1975 | 1264 | 33.9 | 1259 | 33.8 | 1201 | 32.3 | 3724 |
| 1976 | 1284 | 33.9 | 1272 | 33.6 | 1233 | 32.5 | 3789 |
| 1977 | 1246 | 32.9 | 1252 | 33.1 | 1286 | 34.0 | 3784 |
| 1978 | 1179 | 31.3 | 1315 | 34.9 | 1278 | 33.9 | 3772 |
| 1979 | 1177 | 30.5 | 1348 | 35.0 | 1329 | 34.5 | 3854 |
| 1980 | 1074 | 27.3 | 1443 | 36.6 | 1423 | 36.1 | 3940 |
| 1981 | 1017 | 26.0 | 1450 | 37.0 | 1451 | 37.0 | 3918 |
| 1982 | 991 | 25.2 | 1472 | 37.5 | 1464 | 37.3 | 3929 |
| 1983 | 957 | 23.2 | 1458 | 35.3 | 1713 | 41.5 | 4128 |
| 1984 | 969 | 23.8 | 1388 | 34.1 | 1718 | 42.2 | 4075 |
| 1985 | 969 | 23.9 | 1377 | 33.9 | 1711 | 42.2 | 4057 |
| 1986 | 891 | 21.9 | 1386 | 34.1 | 1787 | 44.0 | 4064 |

SOURCE: OECD, *Labour Force Statistics*, 1988.

In an International Labor Organization (ILO) document on Portugal, was referred that "the Revolution entailed a general increase of income in all socio-economic groups, more especially the wage and salary earners, and includes even the higher income groups". But, as stated there, "if the equilibrium in the balance of payments has to be established simultaneously with an employment increase of 8 per cent, average consumption per worker will have to decrease by 13 per cent" (Maton, 1979: 109-110). In late 70's the living conditions has been depreciated. The unemployment rate duplicated from '75 (4.4%) and '83 (8.5%).

Unemployment, 1973-86, unit: 1,000

| Years | No. | | Total | % |
|-------|-------|---------|-------|-----|
| | Males | Females | | |
| 1974 | 31 | 36 | 67 | 1.7 |
| 1975 | 98 | 80 | 178 | 4.4 |
| 1976 | 148 | 112 | 260 | 6.3 |
| 1977 | 147 | 162 | 309 | 7.4 |
| 1978 | 137 | 197 | 334 | 8.0 |
| 1979 | 122 | 222 | 344 | 8.0 |
| 1980 | 104 | 231 | 335 | 7.7 |
| 1981 | 104 | 216 | 320 | 7.4 |
| 1982 | 103 | 214 | 317 | 7.3 |
| 1983 | 127 | 228 | 355 | 7.8 |
| 1984 | 156 | 226 | 381 | 8.4 |
| 1985 | 166 | 219 | 385 | 8.5 |
| 1986 | 171 | 211 | 382 | 8.5 |

SOURCE: OECD, *Labour Force Statistics*, 1988

The worse situation was clearly related with the female unemployment. To give an example, when in 1974 the proportion of young unemployed females (15-19 years) was 5.7 per cent, this rate passed to 33.2 in 1978. Even in '84, this rate was 25.5 per cent. The unemployment was also high among male workers (3.2% in 1974, 16.3% in 1978 and 15.6% in 1984).

Nevertheless, at the end of this period, political expectations of the unions and workers' organizations were frustrated, the living conditions worsened, and the economical restructuring, under IMF co-ordination and European Economic Communities (EEC) distant supervision, was in a development stage. Some important foreign investments on automotive industry, electronics and chemicals and a shift on the export orientation were held: the European market was decisive for the Portuguese economy, when the EFTA model was not anymore suitable.

In this context the sociology of work emerged in Portugal. Its initial phase was similar in a way to the other areas of Sociology: predominantly theoretical orientation linked to the strong influence of French sociology (most of Portuguese specialists on labor sciences studied in France). But this orientation was related also with a prevailing mentality of the political and business sectors that only acknowledges an academic worth of sociological research and ignores its practical usefulness.

The main research themes were linked to topics on Taylorism and workers conscience, labor conflicts, cultural identities, changes in social relation at the workplace, unionism (Lima et al., 1982; Patriarca, 1982; Cristóvam, 1984; Kovács, 1986). These themes reflect the radical changes in Portugal after 1974, namely the institutional transformations, the institutionalization of industrial relations, and the spread of implementation of workers unionization in companies. Studies about labor conflict showed the effects of economic crisis on unemployment and precarization of labor market, and on labor relations. After 1974 co-operatives and self-managed companies had a strong political and social relevance (many had this strong legal change after employers gave up their responsibilities, or after strong conflicts that ended up with occupations followed by the need of production management continuity). The self-managing structures and participation thematic was also one of the important research issues in sociology of work during this period (Baptista et al, 1985).

A major part of those studies were mainly descriptive using qualitative methods of analysis, and applied to manufacturing industries. Surveys were much more difficult due the lack of available funds.

The lacking or relatively reduced financial support in Portugal for sociological research is due, above all, to the fact of attributing only an academic value to this scientific field. There was an underlying mechanistic and formalist-juridical perspective of the social systems that ignored the role played by the social sciences. This role was laying out of a scientific basis as to the decisions and their practical usefulness in the problems solving (Lima, Rodrigues: 1985).

This situation favored and still continues to favor an academic orientation, above all, concerned more with the theoretical and methodological aspects of research and less with its application with a view to practical intervention. Consequently, its promotion is limited to academic channels and to highly specialized journals.

1.2. *Professional identities and scientific developments in the consolidation phase*

This second period could be characterized by a stronger development of the internationalization process of the Portuguese economy. At the end of the first decade the public debate had almost one basic theme: the integration in the European market through the adhesion to EEC in 1986. Relationships with Spain increased significantly, with stronger economical exchanges and investments. The “agrarian issue” signified the end of the agrarian reform with the reflection on decrease of employment and investment in this sector. At the same time, public investment on infrastructures changed also the employment structure: construction activities employed in this period around 8.5 per cent of total civil employment (in 1976 was 7.3 per cent, for example), and the financing activities employed already 6.4 per cent in 1992.

Employment (breakdown by activities), 1987-97, unit: 1,000

| Years | Sectors | | | | | | Total |
|-------|---------------|------|--------------|------|--------------|------|-------|
| | 1 agriculture | | 2-5 industry | | 6-0 services | | |
| | No. | % | No. | % | No. | % | |
| 1987 | 926 | 22.2 | 1454 | 34.9 | 1791 | 42.9 | 4171 |
| 1988 | 885 | 20.7 | 1503 | 35.1 | 1892 | 44.2 | 4280 |
| 1989 | 829 | 18.9 | 1549 | 35.4 | 1998 | 45.6 | 4377 |
| 1990 | 833 | 17.9 | 1607 | 34.5 | 2216 | 47.6 | 4658 |
| 1991 | 836 | 17.4 | 1614 | 33.6 | 2348 | 48.9 | 4799 |
| 1992 | 520 | 11.6 | 1492 | 33.2 | 2488 | 55.3 | 4498 |
| 1993 | 498 | 11.3 | 1446 | 32.9 | 2452 | 55.8 | 4393 |
| 1994 | 510 | 11.5 | 1451 | 32.8 | 2463 | 55.7 | 4425 |
| 1995 | 497 | 11.3 | 1422 | 32.3 | 2484 | 56.4 | 4403 |
| 1996 | 546 | 12.2 | 1404 | 31.4 | 2527 | 56.4 | 4477 |
| 1997 | 623 | 13.6 | 1443 | 31.5 | 2512 | 54.9 | 4579 |

SOURCE: OECD, *Labour Force Statistics*, 1999

There is a clear increase of the employment on the service sectors (mainly, retail trade and tourism, and proximity services)², and a strong decrease on the primary sector (agriculture, fisheries, etc.)³. However, in recent years this primary sector increased its employment volume due to the fact many unemployed from industry “returned” to the agriculture activity, or became new “peasants” (mainly in the dairy sector, cattle producers, forestry, or even bio-agriculture employers). Manufacturing industry maintained its importance (1.4 million workers in 1987 and 1997), and was object of a new investment policy that would lead to a rapid process of modernization and technological development. The unemployment process decreased (in 1988 was 5.7%, in 1992, 4.1%, and in 1997, 6.7%), stabilizing around the 6% with a more equitable distribution among genders.

Yet, in this context, a traditional technocratic mentality was still dominant among policy makers and entrepreneurs that, in one hand, ignored social, organizational and human factors of the economic efficiency and, in another hand, didn’t matter with the articulation of social and economical dimension of society. At the same time in the Portuguese industrial structure prevails the traditional organizational model with authoritarian hierarchical relations, formalism, and low degree of motivation and involvement of the workers. Persisted (and persists!) a technocentric perspective of the innovation mystifying new technologies, ignoring their social and organizational implications. It was becoming visible a tendency towards the increase of unemployment and of the precarious jobs, affecting particularly the young⁴, women and the poorly qualified people⁵. At the same time continued the traditional forms of labor relations with limited negotiated content (mainly, wages and career issues).

To analyze these problems and to search for solutions, sociology of work, together with other specialized sociologies (e.g., sociology of organizations, sociology of employment, industrial sociology, or even women’s studies and sociology of social stratification), played an active role, in booth of terms teaching and research. However, in Portugal, the social sciences, and particularly sociology, had to face greater difficulties than in other countries of the European Union. This concerns a relatively recent scientific area.

Yet, specially in the mid-80s, significant changes arose, manifest in the influence of a diversity of theoretical tendencies (beyond those of French sociology), reflecting a preoccupation with the development of a more professionalized training, and also, in the growing wish for practical intervention of work sociologists. As Kovács highlighted at that time the importance

“Of empirical sociological studies, as well as inter-disciplinary studies, in order to influence social actors showing the complexity of social problems raised by the introduction of new technologies. Is important also to contribute to adapt the technological development to social, economical

² With 1.8 million workers in 1987 (43%), and one decade later (1997) with 2.5 million (55%).

³ From 0.9 million workers (22%) in 1987 to 0.6 (13.6) in 1997, according to Organization for Economic Cooperation and Development (OECD).

⁴ In 1996, the probability of young people from 16 to 29 years old to find a job was, in Portugal, 50.3% (53.7% men, and 46.5% women). In the United States the same probability was 74.6% (OECD, 1998)

⁵ For young male, one year after finishing the school, 54.5% will have a temporary job, and 9.2% in part-time. For females, this rates increase to 62.1% (temporary job) and 17.6% (part-time). In US these data are aggregated, and are 21.3% for male, and 35.3% for female. All figures are related to 1996 (OECD, 1998).

and cultural conditions of the country, to prevent or minors negative consequences or even to contribute to the elaboration of vocational training policies in the field of re-qualification and education” (Kovács, 1986: 513).

These were some of the central issues and controversial themes on the role of scientific research and on the own role of sociologists in changing processes.

The part taken by APSIOT - the Portuguese Association for Sociology of Industry, Organizations and Work-, created in 1984 (member of ISA in category "C" since 1985), in this debate was very relevant. One of the aims of this association was the communication and the co-operation, not only among sociologists of the areas concerned, but, also, between sociologists and other specialists linked to the world of work, as well as between sociologists and diverse social actors.

Debates were organized on priority themes, such as industrial democracy, economic restructuring and the transformation of labor relations, new technologies and work organizations, social criteria for firm performance evaluation, and so on. In these debates participated sociologists, representatives of trade unions and management associations, as well as those of private and public companies. These meetings contributed to remove some of the main obstacles for these specialized fields of sociology, such as the usual isolation of individual researchers. Obstacles were revealed by a lack of available number of fieldwork (case studies, surveys), enclosure in the academic world by the exclusivity of teaching tasks or institutional research oriented to historical aspects. And, finally, these meetings revealed also the existent lack of dialogue between different actors and researchers (and between the social actors themselves or the researchers from different institutions and regions).

One indicator of the consolidation of Work Sociology (with other related fields, or SIOW-Sociology of Industry, Organizations and Work) in Portugal is the regular publication of the journal "Organizações e Trabalho" (Organizations and Work) by APSIOT with 22 issues published since 1989 until the end of 1999 ⁶. But it can be mentioned, the organization of 8 national meetings, 2 conferences on university curricula issues and, also, the growing volume of research and other publications (newsletter, conference proceedings)

Portuguese society is slowly beginning to seek the specific competence (analytical and technical) of the sociologists. Despite this slowness, the demand for new type of sociological research activity is increasing. The area of intervention of the sociologists is expanding, in accordance with the acknowledgement that the socio-cultural dimension has a crucial role to play in the performance and in the revitalization of the economy. Its contribution is being increasingly sought, in the solution of work and organizations problems.

Thus, in this new phase, apart from university or academic individuals, other professional figures are appearing, such as office consultants concerning studies/projects, and, specialized companies, as well as technicians integrated into public and private enterprises and into state organisms. Researchers were seeking to collaborate with different social actors (entrepreneurs, trade unionists, governmental associations, local councils and European Union entities) hoping that the research results will share the decisions of these social actors.

⁶ In 2004 it was published its 32nd issue.

The organization of the 2nd Sociology of Industry, Organizations and Work (SIOW) National Meeting in June 1985 closed a first large cycle of development and consolidation Sociology of Industry, Organizations and Work in Portugal (cf. Kovács, Moniz: 1987). It was in this meeting that the question of professional identity of SIOW was issued for a debate. This debate was held on deontology and perspectives for professional intervention. And it included colleagues from other Sociology fields, and was approved in 1992 (at the 2nd Portuguese Congress of Sociology) the Deontological Code, that became common to Portuguese Association of Sociology (APS and APSIOT).

If the connection to other research networks outside Portugal is a basic need of the scientific growth of Sociology of Work in Portugal, which was a major objective of APSIOT since the beginning of this period (1984-94). Later on, this aim became accomplished in some way through the active affiliation to ISA. The regular contact and exchanges with North-American sociologists just began in recent years. As Ferreira de Almeida pointed out,

“Sociology as it has developed in Portugal is actually receptive to different influences, in fact it actively seeks and selects them, whether they come from the rest of Europe, North America or from other sources and areas. (...) Sociology has had time to get used to living with multiple references, with more or less bodies of theory, and to propose different instruments and fields of research” (Portuguese Association of Sociology, 1994: 495-496).

The major influences were, beside Marxianism and functionalism, the regulation theories, the ethno methodology, the actionalism, among others. But also, as Almeida mentions, “we have no option but to keep a constant eye on the multifarious sociological output outside our own four walls, and to gather there all that which it seems to us will enrich our own world. (...) The small size of our community, together with its open attitude, have prevented the field of sociology in Portugal from splintering into small schools and factions” (Almeida, 1998, 87).

There is a strong orientation towards interventions concerning the change of values, mentalities and work organizations, according to participative management and to motivating and qualifying labor principles. It is in this sense that one can speak of the emergency and diffusion of a professional culture of the sociologists who associate Science and Occupation (Kovács: 1987, Moniz: 1987, Costa: 1990), concerning themselves not merely with scientific quality, but equally with technical capacity and social responsibility.

The most studied themes in Portugal in this period are among others, the new socio-economic dynamics and the changes in the labor market. The new skills and vocational training system, participation and industrial democracy, management and trade union strategies, organizational and technological changes in industry, or job design in flexible production systems, are other thematic studied (cf. Kovács: 1996). A major diversity could be found not only in theoretical and methodological terms, but also in financial sources terms. A part of the studies are also integrated into the European projects coordinated in the scope of CEDEFOP, FAST/TSER, ESPRIT,

FORCE/Leonardo, and so on ⁷. These kinds of studies are being held mostly by research centers and academia.

Mainly the Institute of Employment and Vocational Training (IEFP) fund research projects related to changes in the labor market, new skills and vocational training system. More recently, INOFOR-Institute for Training Innovation is also supporting these kinds of studies. Both institutes belong to the Ministry of Labor and Solidarity (MTS). Typically the studies on these new socio-economic dynamics are either on the new vocational and occupational profiles, either on the new configurations of labor markets or on the social economy. The Maria João Rodrigues studies (1988 and 1991) developed a critical perspective of the economics of labor market, proposing a new framework of an employment system based on the regulation theory. The analysis of the changes occurred in Portugal after 1974 are the main element of the empirical ground for these studies. Kovács et al. (1994) compared qualification and skill requirement according to employers with the labor offer. The unadjustments of the labor market are increasingly important in the context of technological and organizational changes, which are analyzed in different sectors (manufacturing, banking, and retail trade). The M. J. Rodrigues and A. Oliveira Neves study (1994) applied these issues to the regional framework.

The main studies that will be referred next, were supported on empirical data and published in specialized journals or in books. Most of them used the case studies method, but others applied their own surveys. Less numerous are the studies supported on government census data (essentially from the Statistical Department of the Ministry of Labor). In spite of that, an increased number of institutional researches, mostly publishing reports or other forms of “grey literature” (or non-published reports that circulate among the administration agencies and research centers), are supported only in this government census data or revision of the specialized literature.

The participation and industrial democracy is a field that was undertaken by several research centers, and is increasingly involving interdisciplinary teams (sociology, psychology, and engineering). Some of this research underlined mostly the attitudes towards work (Cabral et al, 1998; Silva, 1998; Kovács, Moreno, 1992; Martins, 1996), or the learning organizations - focusing, for example, the training and work contents (Moniz et al, 1998). This type of research analyzed the new forms of work organization, as semi-autonomous working groups, parallel structures, *kaizen* methods for involvement or even other participatory forms (Urze, 1996 and 1998; Teixeira, 1994; Cabeças, 1994; Casaca, 1998; Kovács, 1997 and 1989). But this thematic was developed also by computer scientists that co-operated with sociologists in this topic of participation (Soares, Mendonça, 1998; Moniz, Oliveira, 1996), using concepts of CSCW (computer system for cooperative work) environments, virtual organizations, hybridization or DSS (decision support systems). These studies demonstrate a low level of participation, information and consultation in the modernization process, either through workers unions or committees. But forms of direct participation are emerging when they are related to quality improvement and operational flexibility issues.

⁷ CEDEFOP-European Center for the Development of Vocational Training, FAST-Forecast and Assessment in Science&Technology/TSER-Targeted Socio-Economic Research, ESPRIT-Strategic Program of Research on Information Technology, FORCE/Leonardo-Programmes on Training Innovation

The thematic on management and trade union strategies in the context of economic restructuring is being researched with the support of the Ebert Foundation, or the Foundation for Science and Technology (PRAXIS Program). Different specialists are studying the management strategy development: not only sociologists, but also management scientists (Sousa, 1989; Ussman, 1998).

The trade union organization, the unionization of labor force, or the industrial relations systems in Portugal, constitute another research thematic for many sociologists. They were stressing the organization problems (Cerdeira, 1997; Rosa, 1992; Stoleroff, 1990; Stoleroff and Naumann, 1993; Cerdeira and Padilha, 1988), or strategies towards employment (Cerdeira and Padilha, 1990; Lima et al, 1992; Lima, 1991; Kovács, 1989b) and bargaining policy (Dornelas, 1996; Mozzicafreddo, 1994; Cerdeira, 1989). Since late 1980s Cerdeira has studied for several years both labor strategies (1998 on the employer organizations, and 1997 on unions).

Findings on this theme include the late institutionalization of the labor movement, a weak role of the autonomous negotiation between employers and unions, and an excessive intervention of public administration to solve labor conflicts. There is a weak involvement of unions in small and medium-sized enterprises (SMEs), which have at the same time a strong weight in the industrial fabric. These firms have a low influence in the public policies. A strong division and competition among union movements (CGTP and UGT, independent unions) and a limited range of the bargained collective agreements are also findings. Finally, is clear a defensive union's strategy around classical demands (wages, working time) and an absence of labor agreements on technological changes, work organization, vocational training, occupational profiles.

The organizational and technological changes in industry are central issues of the research in sociology of work in Portugal. Most of publications with results (articles or books) show that those research findings are build up in several industrial sectors. Examples can be found in the electronics and telecommunications (Assunção and Bilhim, 1998; TDC/Fundetec/Dinâmia, 1997; Leitão and Moniz, 1996), in the printing sector (Reto et al, 1996), in the plastic industry (Moura, 1996), in the automotive sector (Lima et al, 1996; Neves, 1996; Oliveira, 1996; Stoleroff and Casaca, 1996 and 1998; Moniz, 1998), or in the textile/garment sector (Marques, 1998). Other researches are oriented towards the development of an information society in Portugal (Moniz, 1999; Kovács, 1998) or the organizational framework of technological innovation (Bilhim, 1995). Some general conclusions on this topic may be drawn on a rapid diffusion of information technologies and an evident integration of the industrial strategies into more global economic spaces (Iberian, European and international). Another finding related to a diversity of forms of work organization using new technologies. There is a low diffusion of new forms of work organization: only one-fifth of firms apply non-Tayloristic organizational forms (Kovács et al., 1992b). These rapid changes originated a strong process of requalification. The employment structure tends to change, by an increase average level of labor force schooling, and by unemployment of older and less skilled workers (mainly in electronics and textile sectors). Most of these studies were field studies, nationally representative, and some based on workplaces changes analysis.

New investments in the automotive and metal engineering sectors were due to a globalization of businesses and to an increased insertion of Portuguese SMEs in the internationalization process (mainly with European networks or transnational

enterprises). The research topic on people, organization and competitiveness (Rodrigues, 1991) was overlapping another emergent topic related with this: the human resources management. Some very interesting studies were published on the banking sector (Machado, 1996; Coelho and Moura, 1998) and on the textile sector (Marques, 1997) used sectorial surveys and structured interviews to key actors.

A more micro-level research can be found. And more recently the issue “job design in flexible production systems” is been revealed as an interesting theme for sociologists of work (Moniz and Oliveira, 1996; Cabeças, 1996; Moniz, 1990). The work published are normally based on case studies, or developed with prototyped structures based on workplaces and firm analysis, using an interdisciplinary approach. In this case, the research involves mostly computer scientists or industrial production engineers and sociologists.

This research mentioned reveals the main changing trends (some contradictory in terms of regions or sectors), identify the firm’s labor demand needs confronted with the existent offer in the labor market, and contrasts the employer representations of industrial changes with the employees ones. A relevant number of studies presented systematic recommendations for implementation (by firms, social partners and public administration) or policies development.

We can say then, that the two main research lines with more practical influence are the issues on skills, training and labor markets, and the issues on technology design, organizational development and new production systems. Both supported by surveys and other empirical data collection. The growing importance of this thematic can be revealed by the fact that their are included in the agenda of the major engineering activities⁸, by the officials from industrial support public agencies, and by those responsible for training and employment policy.

At the same time, some documentation centers with available information in this specialty of sociology⁹, presented bibliographic exhibitions in recent National Meetings. Diffusion of information has been organized by the *Boletim SIOT* (edited by APSIOT with more than 40 issues were published until 2000) in the last decades.

In spite of these achievements, some difficulties persist. As referred J. Madureira Pinto in a Congress of Sociology,

“The last years have been particularly difficult to universities. These are institutions that polarize decisive competencies and energies in the national scientific panorama, as for the same time decreased to worrying levels the amount of financing given by the competent institutions to research projects in our field” (Pinto: 1993).

The impact of this situation has been analyzed, and emerged a slight change on the social science policy designed in the corridors of the Ministry of Science and

⁸ For example, the organization of Seminars of CAD/CAM/CAP, organized by the national association of engineers (Ordem dos Engenheiros), and the last ones with international participations, had always themes on “anthropocentric approaches” or “human-oriented production systems”.

⁹ APSIOT’s Documentation Fund (Lisbon), UNINOVA-Instituto de Desenvolvimento de Novas Tecnologias Center of Intelligent Robotics Library (Monte de Caparica), Documentation Center 25 April (Coimbra), Social Research Center of University of Azores (Ponta Delgada), CIES Library (Lisbon), SOCIUS Library (Lisbon), and more recently, the FDSI-JB “José Baptista Industrial Sociology Documentation Fund” at FCT-UNL (Monte de Caparica).

Technology. Some research program is increasing the financial support to sociological analysis, and the field of SLOW is one of the most important in Portugal among sociology (in terms of project funding and scholarships).

The increase of market demand for rapidly applicable studies made visible the coping with a pragmatic, empiricist and economist orientation, which reproduce ideas of the management ideology.

1.3. *Recent trends*

In 1994, during the 6th National Meeting (ENSIOT) it was made an overall balance of 10 years of associative life. It was underlined the fact that this “second cycle of the development of SLOW in Portugal represented a phase of maturing in this scientific field” (Moniz: 1994). The third phase, started from this 6th meeting, and would make real the remaining objectives designed in 1984, i.e., the adoption of a pragmatically sight of concerted and united action, as referred by José Baptista (the first President of APSIOT). In the “agenda” concerning the intervention of sociologists, some problems are pointed out, in order to contribute towards the better understanding of the socio-cultural system of the organizations, the strategies of the social actors and social relations at work. Other activities are held to make the organizations more efficient by human-centered technical and organizational innovations (de-centralization and participation), or even to avoid or to minimize negative social consequences, to reduce social costs (unemployment, disqualification, the increase of social inequality) of economic restructuring (cf. Kovács: 1996).

New related themes for research can be designed, as new models of production, changing labor relations, direct participation, teleworking and job design, atypical employment, virtual enterprise and networking.

One can find several sociological studies and labor economy research findings, which feed one another strongly in the most recent years. Those studies are on the emergence of new neighborhood services and its impact on employment (Simões, 1999, Evaristo, 1999). And, are on the employability trends (Kovács, 1999; Imaginário, 1998; Oliveira, 1996), on new qualifications and skills needs (Moniz, and Kovács, 1997; Kovács et al, 1994; Rodrigues et al, 1996), and on industry restructuring and its effects on labor market (Rebelo, 1999; Oliveira, 1998; Parente, 1998; Gomes, 1998; Rita, 1997; Neves, 1996; Reis et al, 1996; Almeida, 1996; Rodrigues and Neves, 1994). It can be referred also studies on non-standard forms of work as, part-time jobs (Janeiro, 1998), teleworking (Fiolhais, 1998) or independent jobs (Freire, Delgado, 1996). One conclusion is that an increased attention is given to new aspects of employment, and not only to evaluation of impacts on unemployment levels or on jobs de-skilling. The regional, juridical or economic approaches are strongly taken into consideration in sociology of work researches.

On the labor relations’ issues, the more recent findings can point out to the fact that the major collective agreements become un-adjusted to the changed conditions at the firm level due to technological or organizational changes. And can point out also to the prevalence of sector bargaining (there is no national or inter-professional agreements, for one side, and no firm level agreements, for another side). Maintains a strong employer protagonism in the modernization processes, when a weakened bargaining power of the unions is evident and when the participation structures

(workers' committees, safety councils) are weak. This situation can lead to a strong marginalization of the unions from this modernization process and a weakened social control mechanism.

In recent years, sociologists have developed the study of new models of production (Kovács and Castillo, 1998, Kovács, 1998), based on several case studies in different sectors. The study analyzed the most used or sound concepts of production management (as total quality management, just-in-time concepts, lean production, outsourcing, downsizing, anthropocentric systems, reflexive production, etc.), and their implementations in Portugal. The major finding supports the idea that new management and organization principles tend to be applied in firms worried about quality and innovation. Regularities are difficult to find, except on the relation participatory structures/increment of productivity, or centralized organizations/dysfunctionalities. However, it seems there is no "one best model" in terms of production management strategy.

Some of "white papers" of European Commission (EEC) also push the debate in these fields, and introduced new references into this debate. Most significant themes were the "information society", the "new partnerships for organizational changes", the "learning society and the long-life learning", "social policy and quality of living conditions", "innovation and competitiveness".

In spite the development of sociology of work, there are not enough post-graduated professionals in this field in Portugal. Efforts are being made to promote PhD-level courses and other postgraduate courses, and the trend allows us to perceive a strong increase in the number and quality of experts in SLOW. Another contribution to this development is the fact that, through the 4th Framework Program on Science and Technology of the European Union (1994-1998), in particular, its specific social science program TSER (Targeted Socio-Economic Research), many research teams were involved with international partnerships.

This fact pushes those teams in the direction of comparative methodologies, acquaintance of research techniques developed by other mature teams and a better knowledge of the own research materials when facing information coming from abroad. Such trend of research organization is reestablished with the new 5th Framework Program (1998-2002).

Whereas it was once usual to think of anything coming from another country as good (!), an attitude quite common among sociologists during the here mentioned "1st phase", more and more this attitude is declining in popular. There is an increased attention towards results and problematic developed and presented within Portuguese research projects. Authors, recognized scholars, and researchers, are more involved in public debate or, in some cases, involved with government tasks or other political activities. One can assist to an increase of public importance of sociological analysis specificity's or research findings.

2. PRESENT CHALLENGES TO THE SOCIOLOGY OF WORK IN PORTUGAL

2.1. *The training of sociologists and other interventions in the work area*

One of the main challenges, as mentioned above, refers to the training of sociologists in the sense of facilitating their integration into the labor market, not only in the academic sphere. Beyond the training of sociologists to achieve adequate competences, is very important the training of professionals whose activity is central to the shaping of the work sphere, such as economists, managers, and engineers, amongst others. In spite of the fact that, today, the social and psychological parameters are beginning to be increasingly included in the training programs of these "interventionists" in the working world, a strong "technicist" orientation continues to predominate.

Particularly important is the inclusion of the "sciences of labor and of organizations" in the vocational training of those who conceive and/or adopt new technical solutions (information system specialists, systems analysts, engineers and technicians). These experts, in proceeding to processes of computerization and automatization, do not limit themselves to altering the technical system, but interfere equally in the social system. Therefore, it is fundamental that, either they have the training which enables them to intervene in the social dimension, or, that they otherwise communicate and co-operate with other specialists, who have the necessary knowledge relating to the social and organizational dimensions.

It is worth to mention the fact that the national Association of Engineers (Ordem dos Engenheiros) recommends sociology as a complementary training course for their diploma level. This can represent also a challenge to sociologists when they have to answer this kind of solicitation and when a new co-operation path is under way.

2.2. *Dispute with other specialists*

The increase of the intervention space of sociological research occurs when there is a competition with other specialists (economists, managers or "wide-scoped" consultants) who dispute the same field of intervention (human resources management, organizational behavior). These specialists do not have a large and deep knowledge in sociology but they are only familiar with some best-selling literature. The superficial assimilation of certain notions and discourses about human behavior by this specialists, results in a simplifying reductionism and in the mechanical application of promising techniques for change, elaborated by the amply promoted and publicized "gurus" of downsizing, reengineering or benchmarking. An alternative approach and action, when confronted with the remedies of social techniques, disembodied from a system of coherent knowledge, (produced by sociology of work and other social sciences) constitutes one of the challenges to the sociologists of labor.

Sociologists demonstrate that it is not possible to successfully apply "techniques" of motivation, participation or innovation without understanding the attitudes, motivations, rationality forms, collective behavior (interactions, influences, communication), organizational structure, or the variable and mechanisms of structures and mentalities changes.

Organizational change is not a question of application of social techniques, like many managers and consultants would like. It is a question of the comprehension of the functioning of the socio-cultural system, and of its different and even contradictory

rationalities. The space of intervention of the sociologists is precisely that: contributing towards the comprehension and analysis of the socio-cultural system, creating conditions for reflection on the problems and on the choice between alternative solutions.

We can observe a trend of dilution of disciplinary boundaries. However, this process is ambiguous. In some cases it can promote the co-operation among scientific fields, the creation of inter-disciplinary teams, but in other cases can create fractal situations when economists or management scientists develop research projects in the field of sociology or of sociological nature without real inter-disciplinary teams or without co-operation with sociologists.

2.3. *Participation of sociologists in the social and organizational molding of the new technologies*

The growing diffusion of the information technologies in several fields of activity with its quantitative and qualitative implications at work, constitutes a challenge for the sociologists: Do the new technologies create or destroy, qualify or disqualify employment, centralize or de-centralize information and decisions? In relation to these questions, optimistic and pessimistic conceptions confront one another. Some seek to prove that the new technologies lead to disqualification and to unemployment, and others, on the contrary, announce the increase of employment in quantity and in quality.

In reality, there is not one, single tendency, but, both tendencies are verifiable. They are verifiable in accordance with a series of organizational and socio-political variables, such as, the strategy of industrial development, the labor market structure, the costs of production factors, the manpower policy, the education and training system, the forms of work organization, the management methods, the organizational culture, amongst others. There isn't one, unique tendency, but possible futures. One of the futures possible refer to the computerized Taylorism, in which computerization is used to systematically and permanently control men and machines and in which one opts for centralist and determinist hardware and software structures associated with a neo-Taylorist work organization. In face this, is very important to develop alternative productive systems in which potentialities of computerized technology complement each other, with the specifically human capacities associating themselves with new forms of work organization.

These alternative systems are directed towards the valorization of human abilities and skills in the context of participative and flexible organizations. This orientation implies the shaping of technology to improve competencies and decision making capacity of people, allowing, at the same time increase economic performance. Sociologists, in the context of the diffusion of new technologies, can participate in the conception of alternative systems and in pilot experiments, in an interdisciplinary perspective. But also can evaluate advanced technological systems already functioning using human/social criteria, and analyze and search solution for the problems linked to the negative effects of the new technologies (cf. Kovács and Moniz: 1989).

This kind of intervention needs the collaboration of work sociologists and psychologists with entrepreneurs, managers, engineers, operators and trade unionists, and requires a capacity for communication, learning and work in multi- or interdisciplinary teams.

The fact that human and social aspects tend to be undervalued is due not only to the subsistence of a traditional mentality marked profoundly by Taylorism, but also to the attitudes of the actual social scientists themselves. According to Chris Clegg and Martin Corbett, it must be said that social scientists themselves have contributed substantially to their scanty influence. The social scientists have failed in persuading others as to the legitimacy and significance of the human aspects of the Advanced Technology of Production. These lapses on the part of the social scientists are connected to the objectives of the research, with the emphases and with its style (Clegg, Corbett: 1987).

The research projects concerning CIM (computer integrated manufacturing), which, in Europe, are developed mostly at an international level in the scope of the ESPRIT Program, constitute an opportunity for the contribution of the social sciences. Various research groups have demonstrated the possibility of this participation¹⁰. The same applies in Portugal, as shown by the examples of research projects developed by sociology teams working together engineers at the UNINOVA-CRI Intelligent Robotics Center, and at INESC-Porto (Institute of Systems and Computers Engineering). Some projects are joined ones, or with international teams. Relevant is the fact that, increasingly, unions are more interested in this type of research activities and they are involved in these projects.

2.4. *Improvement of competitiveness and the Sociology of Work*

Another challenge refers to participation of sociologists in the revitalization of the economy, above all in the improvement of the competitiveness of the enterprises. Sociologists can intervene in innovation processes at firm level, most notably in the work organization, as well as in the evaluation of the results based in social criteria. They can indicate which are the principal malfunctions of the existing work organization, what its costs are and suggest changes. They can show how taking advantage from the potentials of the new technologies undergoes adequate changes in the work organization and in the promotion of participation.

This activity implies a divergence of interests and points of view when the entrepreneurs expect, first of all, the improvement of the competitiveness of their enterprise, even with high social costs. In turn, sociologists wish to reconcile the improvement in competitiveness and the improvement of the quality of life at work and in society in general.

The preoccupation of sociologists with the quality of life in general and, in particular, at work, is so much more important, as to how much an atmosphere fitting to face

¹⁰ Amongst others, in Great Britain, the Institute of Science and Technology at the University of Manchester (UMIST), the group of Social and Applied Psychology of the University of Sheffield (SAPU), the Institut Arbeit und Technik (Gelsenkirchen, Germany), the group of Sociology and Human Resources at the DTI (Taastrup, Denmark).

competitiveness as an aim in itself, exists. The production model that, at present, generates the greatest fascination in the race towards competitiveness is the “lean production model”. The fundamental aspect of this model is that it contains various risks. In this context it is important that work sociologists, in a critical position (Castillo: 1994) towards the Taylorist-Fordist model, do not turn into ideologists of the lean production model (Kovács: 1994; Kovács and Castillo, 1998).

It is important that sociological research call attention to the ambiguity of some institutionalized forms of direct participation and some of new forms of work organization utilized. Frequently, promotion in a technical perspective of some forms of direct participation, does not, in fact, increase participation, since it leaves intact the principal factors of non-participation linked to the existing work organization. The promotion of polyvalence, of group work, can be carried out with the objective to reduce the number of employees, without improving qualifications, maintaining hierarchical relations and the content prior to the job. But these same forms can be promoted as intermediate ones in a process of innovation oriented towards the global transformation of the enterprise.

In spite of the upsurge of a certain consensus concerning the necessity of promoting participation, manifest in the great promotion and multiplication of its forms, participation might not in fact increase. Paradoxically, the promotion of participation in accordance with subjacent objectives, can result in a mere formal participation leading to apathy, and, even, to the increase of pressure on and control of individuals and groups, resulting in the loss of autonomy (cf. Casaca, 1995).

With increasingly precarious jobs, unemployment, abandonment of the full employment policy and the social well-being programs in the name of competitiveness, we find ourselves confronted with a paradoxical evolution. For some, the job and the firm turn into a place of citizenship, of sociability and of the expression of subjectivity. For others, a significant sector of the population, the right to work is denied at a time when financial resources, destined for the problems of poverty and social security, are being increasingly reduced.

It is necessary to wide the research object into non-work activities (leisure time, domestic and education activities, etc.), the articulation of these activities with the working activities, producing new needs for flexible working hours, new types of work, commuting and teleworking. This analysis requires also new inter-disciplinary approaches into anthropology, ergonomics, psychology, geography and other sociological specialization's (family, gender, culture).

The study of the evolution of the international division of labor in the context of a globalization of the economy constitutes equally a challenge to the sociology of work. The constant search for the most advantageous localities for selling and producing products and services on the part of the trans-national companies tends to lead towards segmentation of the productive process and to a spatial division of labor. It is important to know the location of knowledge-intensive and routine tasks - either among or within firms, or among or within regions.

In this process, professional work linked to a high technology is inclined to be situated in restricted areas of the world that are equipped with material infrastructures, and advanced information-communication facilities. Routine operations either are to be either relocated to regions in which there is a cheap labor force, or to be otherwise

automated in factories located within the proximity of the social headquarters of the trans-national company.

In this context, the dilemma presents for the sociologists is either to promote their teaching and research activities in a more critical perspective, or to make themselves more instrumental in the service of competitiveness.

The first option implies showing the distance that separates discourse (of post-Fordism, of the information or knowledge society, etc.) and the dominant practices by way of the study of concrete situations. And at the same time, that option should alert to the serious social consequences of the race in the direction of competitiveness, creating a greater awareness in respect of other humanized alternatives. The second option means identification with the ideology of competitiveness and an orientation towards "human engineering", in the way that C. Wright Mills characterized (and criticized) it.

3. CONCLUSION

We can speak about the challenge of choice, on the part of the sociologists, between alternative functions. They can be social technicians for solving administrative problems, researchers channeled in the direction of "pure" or academic science, or, even agents of change, that is to say, researchers involved in social innovation actions. As agents of change, they can consider their own selves as specialists with a vocation towards the elaboration of change projects, ready to be applied in companies, or, as participants and co-authors in processes of innovation. In this last case, a new model of scientific research that breaks with the positivist-empiricist model. Rather than making a declaration of neutrality, the model compromises itself with certain values, such as the humanization of labor, the improvement of the quality of life at work (and quality of living conditions), and the democratization of organizations. It has been, as an objective, the development of the social competence of the non-scientists. In other words, in a manner different from that of the 1960s and of the 1970s, it is possible to unite critical perspectives and research oriented towards practical usefulness.

However, this orientation implies a latent conflict between decision-makers and sociologists, due to the divergence of interests. This relationship can become particularly quarrelsome, when the decision-makers expect from the researchers immediate help with their problems and, in turn, the researchers concern themselves with the transformation of social practices, in accordance with new values. Even when informed people listen to sociological discourse acknowledging the usefulness of sociological research, the divergence of interests and of points of view remains. For the enlightened decision-makers, social innovation in the first place is a mean of improving economic results. For the socially committed researcher, innovation in the first place is a way of improving the quality of working life.

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