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≡ The Oxford Handbook of
**PORTUGUESE
POLITICS**

THE OXFORD HANDBOOK OF
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POLITICS**



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Edited by

JORGE M. FERNANDES,
PEDRO C. MAGALHÃES

and

ANTÓNIO COSTA PINTO

OXFORD
UNIVERSITY PRESS

FUNDAÇÃO
FRANCISCO MANUEL DOS SANTOS

OXFORD
UNIVERSITY PRESS

Great Clarendon Street, Oxford, OX2 6DP,
United Kingdom

Oxford University Press is a department of the University of Oxford.
It furthers the University's objective of excellence in research, scholarship,
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Published in the United States of America by Oxford University Press
198 Madison Avenue, New York, NY 10016, United States of America

British Library Cataloguing in Publication Data
Data available

Library of Congress Control Number: [To Come]

ISBN 978-0-19-285540-4

DOI: 10.1093/oxfordhb/9780192855404.001.0001

Printed and bound in the UK by
TJ Books Limited

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CPP1

PREFACE

CPP2 WHY publish an *Oxford Handbook of Portuguese Politics*? In the mid-1970s, the military coup that put an end to the *Estado Novo* regime in Portugal attracted significant international attention. Almost overnight, social scientists and journalists from all over Europe and the United States arrived in Lisbon and placed the country on the roadmap of comparative politics. The Portuguese democratic transition put a final nail in the coffin of the age of empires and initiated what Samuel Huntington famously called ‘the third wave of democratization’, which would later spread to the rest of Southern Europe, Latin America, Eastern Europe, and parts of Asia and Africa. Since then, Portugal has joined the European Union, becoming an advanced economy and one of the countries classified with ‘very high human development’. In time, as Portuguese democracy became consolidated and Portugal became ‘just another case’, international attention from social scientists waned.

CPP3 For all its similarities in terms of economic and political development with most advanced industrial democracies, Portuguese politics contain remarkable specificities that make the country an interesting laboratory for several pivotal problems assailing contemporary democracies and which warrant closer inspection. For one, the nature of the Portuguese democratic transition in the 1970s—unusually triggered by a coup conducted by mid-ranking military officers—paved the way for a social revolution, whose legacies many argue have survived to this day. As various authors have stressed, including several who have contributed to this volume, those legacies can be recognized in the role of the state in the economy, in political culture, and the repertoires of political action, and in the social cleavages underlying the party system. Portugal provides therefore an important illustration of how the understanding of contemporary politics benefits from an historical perspective that addresses the origins of political regimes and their legacy to the future.

CPP4 Furthermore, despite being an average country in the European context, Portugal is an interesting case to explore in terms of its foreign policy. Positioned in the westernmost region of mainland Europe and coming from a centuries-old empire that once—and until exceptionally late—held territories in four different continents, Portugal has turned to Europe as a catalyst for democracy and development since the 1980s. This has resulted in a remarkably complex foreign policy, balancing the demands of transatlantic relations, European commitments, and deep cultural and economic ties with former colonies. The country’s post-colonial legacy has been relevant not only in terms of international affairs, but also within Portuguese society itself, raising issues related to social integration, racial attitudes, and cultural and national identities that remain visible today.

CPP5 Political institutions, parties, and mass political behaviour in Portugal also provide several different points of interest. These include, first and foremost, the process through which Portugal shifted from high levels of cabinet instability and party system fragmentation in the 1970s and 80s to stable majority and minority cabinets and comparatively low levels of

ideological polarization in the noughties. Today, however, Portuguese politics are in flux, with higher cabinet instability and a changing party system, with the emergence of new parties, including on the radical right. The consequences for the party system and political competition remain to be seen. Furthermore, Portugal's semi-presidential system, with an elected head of state whose role corresponds neither to the 'all-powerful' French model nor to the mostly ceremonial Irish one, is also an interesting case from a comparative point of view, especially considering similar or comparable offices in Eastern Europe.

CPP6 Finally, Portugal was at the very heart of the Eurozone crisis, becoming one of the countries bailed out by the European Union (EU) and the International Monetary Fund (IMF) in the early 2010s. The social and political impact of that crisis—particularly as it manifested itself on partisan politics, electoral behaviour, and cabinet formation—and the way that this crisis was ultimately overcome have sparked intense interest from comparative scholars. In comparison with similarly affected countries, the return to credibility in international markets was quick and secured without the kind of political backlash observed elsewhere, and the post-crisis recovery in political trust and public support was more robust.

CPP7 This is more interesting when we look at the causes, rather than the consequences, of the Portuguese economic crisis itself. Although many of them were exogenous and common to many other countries, it is also true that Portugal was already experiencing a long period of protracted economic stagnation in the decade leading up to the Great Recession. During the first decades of democracy, starting out as a fundamentally rural, backward, and deeply unequal society, Portugal leapfrogged many of the developmental stages that elsewhere had led to consolidated and effective welfare states, converging with Europe in most social and economic indicators. However, in this century, comparatively low levels of education and productivity, a rapidly-ageing population, systemic regulatory failures, extreme centralization, and flailing quality of governance seem to have combined to pose enormous challenges to Portugal's development prospects. The political economy and the policy dimensions behind these challenges are central to this volume.

CPP8 Portuguese social sciences have developed significantly over the past five decades. The maturity of the field permits us to take stock of Portuguese specificities, and the comparative leverage they allow, to produce a systematic and state-of-the-art coverage in the English language that has been missing thus far. The *Oxford Handbook of Portuguese Politics* aims to become the contemporary reference text about Portugal and its political system. We hope that political scientists, economists, historians, and sociologists take advantage of the wealth of data and knowledge amassed in this volume and find more incentives to include Portugal in their studies. Our *Handbook* includes 48 chapters, covering most aspects of Portuguese politics from an interdisciplinary perspective. The edition is divided into eight sections.

CPP9 The first section looks at the **Past and Present** of Portuguese politics. It offers an overview of Portuguese political developments since democratization in the 1970s. It begins with a chapter outlining the comparative relevance of the Portuguese case. The subsequent chapters delve into democratization and its legacies, the political and socio-economic evolution of the country since 1974, as well as the empire and decolonization process as a watershed moment in Portuguese history. The section concludes with two chapters on the historical and cultural roots of left- and right-wing politics in Portugal.

CPP10 The second section looks at **Political Institutions** as the building blocks of Portuguese democracy. These chapters cover a constellation of topics ranging from semi-presidentialism, a defining trait of Portuguese democracy since its inception, to legislative

politics, executive politics, and judicial politics. Furthermore, this section contains work on the electoral system, public administration and bureaucracy, as well as decentralization and local politics.

CPP11 Our third section examines **Mass Politics and Voters**, that is, a thorough analysis of the demand-side of mass politics. We start by looking at nationalism and national identity, in a chapter discussing how the Portuguese envisage the country's imagined community. Next, we examine how Portuguese citizens engage with and support democracy and its institutions. This section further looks at election campaigns, voting behaviour, electoral turnout, and mass media and political communication.

CPP12 The fourth section turns to the supply side of mass-politics by looking at **Parties and the Party System**, that is, how political parties structure political competition by channelling the demands of the citizenry. This part starts by examining candidate selection. In so doing, it offers a detailed analysis of the recruitment mechanisms used by Portuguese parties. Next, it moves on to political elites and executive leadership. In this part, we further include a chapter on political parties and party systems whose content focuses on the internal organization of parties and the structuring of political competition. Furthermore, the section includes a chapter on parties and political representation, focusing on ideological congruence and citizens' preferences. Section Four concludes with a chapter on party regulation in Portugal over the past 50 years.

CPP13 The fifth section looks at the Portuguese **Society** by unpacking a plethora of societal aspects with direct implications for politics. It begins with a chapter on gender and politics, devoted to women's inclusiveness, from a highly patriarchal society to increasing participation in political and economic life. Next, the section delves into interest groups, business associations, and unions, followed by a chapter on emigration and immigration, whose consequences loom large in Portuguese society. Subsequently, we move on to social movements and protest, with a strong focus on the consequences of the Great Recession for the revival of protest repertoires in Portugal. Next, there is a chapter dealing with the role of religion in Portugal, with an emphasis on how the Church played a role in democratization and how it subsequently adapted to its waning influence in society. The final chapter focuses on social and economic inequality and its consequences for the functioning of democracy.

CPP14 The sixth section examines **Governance and Public Policies**, with a view to understanding how a constellation of public policies has an impact on the quality of governance and in fostering well-being. More specifically, it opens with a chapter on the welfare state, followed by comparative analyses of labour market policies and the macroeconomic policy framework. Furthermore, it includes chapters on education and health policies, whose importance is vital to promote social inclusion in Portugal, a highly unequal country. Next, this section offers a chapter on corruption, whose goal is to analyse its impact on the quality of governance, as well as a chapter on taxation and accountability at the local level. This sixth part concludes with a chapter on how Portugal has dealt with the challenges of economic globalization and increasingly open markets for goods and services.

CPP15 The seventh section looks at **Portugal and the European Union**. It begins by providing a chapter on Portuguese participation in monetary integration, focusing on its consequence for economic growth, competitiveness, and how it influenced the 2011 bailout. The following chapter takes a more general view by chronicling the historical roots of Portugal's participation in European integration from 1986 through today. Subsequently, we look at the politicization of 'Europe' and European integration in Portugal, and how it has changed domestic

political competition. This section concludes with a chapter on the roots and consequences of the Eurocrisis in Portugal.

CP.P16

The eighth and final section unpacks Portuguese **Foreign Policy and Defence**. Since democratization, Portugal's position within the international arena has faced some tensions, as it attempts to pivot between Europe, Africa, and the Atlantic. This final part of the book begins with an overview of Portuguese foreign policy, followed by a more focused analysis of relations with regions of interest, including Brazil and Africa. Next, the section includes a chapter on security and geostrategy. It concludes with a chapter on the army and defence, discussing the evolution of the role played by the army since democratization through to its twenty-first-century role in the North Atlantic Treaty Organization (NATO).

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ACKNOWLEDGEMENTS

CP.P18 OVER the past 50 years, Portuguese social sciences have become a mature field of research. The constellation and diversity of topics covered in this volume illustrate how the study of Portuguese politics has come a long way since democratization when social scientists had only a modest understanding of the fabric of Portuguese society. The editors are grateful to all the authors for accepting the challenge of contributing to this *Handbook*. Their enthusiasm in embracing the project allowed us to put together an edition that, we believe, will become a landmark in Portuguese social sciences. The chapters offer a wealth of analysis and data that have hitherto been unavailable in a systematic fashion to international audiences. We hope that the understanding of Portuguese politics in a comparative perspective will benefit from these contributions.

CP.P19 We would like to express our gratitude to the Francisco Manuel dos Santos Foundation for supporting this ambitious project. The Foundation has played an invaluable role in promoting the study of Portuguese society. We are grateful for the generous support from Gonçalo Saraiva Matias. At the Foundation, Susana Norton has provided us with unwavering support. We would also like to thank João Tiago Gaspar for his inexhaustible patience with our many requests. Thanks are due to Rita Matos for an excellent job in editing and proofreading this volume. We would like to thank the Guide team, especially Nuno Cartaxo, for designing high-quality figures for all chapters.

CP.P20 Finally, we would like to thank Dominic Byatt at Oxford University Press. His unfettered enthusiasm and support from the very first day we came to him with the idea of making an *Oxford Handbook of Portuguese Politics* have been extremely important to this endeavour.

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