

“Rediscovering” Brazil?

A Qualitative Study of Highly-Skilled Portuguese Immigration in Brazil in the Twenty-First Century

By Maria Luana Gama Gato



Brazil always excites the imagination of those who behold it. The intensity of the light, the brightness of the color, the richness of the vegetation, the vastness of the landscape, the beauty of the people combine to make a seductive sight few have been able to resist. The alternating simplicity and complexity of the land and its inhabitants further intrigue any who delve even shallowly beneath that alluring surface.

(Burns, 1980)

Cover photo by the author:

An afternoon on Ipanema beach with flags of Portugal and Brazil adorning a beach shack during the FIFA World Cup

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I started studying Cultural Anthropology and Development Studies in 2008 out of interest for different cultures and how they interact with each other. Truth be told, I was really just curious as to why we just seem to be unable to perceive others (or ‘the Other’) as simply humans; why we emphasize the differences between us instead of the similarities; why there even is an us-they dichotomy. Years of studies increased my interest in inequality and injustice. My bachelor’s thesis dealt with public space management in Mexico City, and I decided to do a master’s in Human Geography, with a focus on Globalization, Migration and Development. I started in 2012, finished my courses, wrote my proposal, left for Brazil to research mega-event led elections, and came back – heart-broken, but mostly insecure about all the choices I had made in the past five years.

This thesis is the result of a second research project, a second research proposal, and a second fieldwork experience in Rio de Janeiro – all within an 18 month timeframe. It is also a very personal piece that has brought me closer to my roots and the cultures that have formed me. It has taught me so much more than all the theories, topics, approaches, methods, perspectives, and dimensions I have studied during all my university classes. It has formed a bridge between my ‘Portugueseness’, my ‘Brazilianness’, and my ‘Dutchness’. In a way, this thesis is me.

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*“O Tempo só anda de ida.
A gente nasce, cresce, envelhece e morre.
Pra não morrer
É só amarrar o Tempo no Poste.
Eis a ciência da poesia:
Amarrar o Tempo no Poste!”*

Manoel de Barros

*“Não tenho sentimento nenhum político ou social.
Tenho, porém, num sentido, um alto sentimento patriótico.
Minha pátria é a língua portuguesa.”*

Fernando Pessoa

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Acronyms

CPLP	Comunidade dos Países de Língua Portuguesa
DLMT	Dual Labor Market Theory
EU	European Union
IOM	International Organization for Migration
LMS	Lusophone Migration System
MPB	Música Popular Brasileira
MSA	Migration Systems Approach
NELM	New Economics of Labor Migration
PALOP	Países Africanos de Língua Oficial Portuguesa

1. Introduction

Migration in the sense of human mobility is inherent to human kind. The exploration and subsequent colonization of the world by European states around the end of the Middle Ages served as a stimulus to the first significant waves of international migration of all kinds and numbers (Castles & Miller, 2009, p. 79). Despite this secular history of human mobility, the scopes and numbers of today's flows are incomparable to previous ones, leading some scholars to refer to today's era as "The Age of Migration" (Castles & Miller, 2009). In 2013, for instance, the number of international migrants worldwide reached 232 million, a consecutive growth from 154 million in 1990 and 175 million in 2000 (UNDESA, 2013). The directions and intensities of migration pattern tend to change overtime depending on economic, social, and political factors. This introductory chapter has the purpose to shape the global and economic context in which changed migration flows have been taking place from Portugal to Brazil in the 21st century. After a brief and general contextualization, the scientific and societal relevance of this research will be pointed out, followed by the research objective and questions. The chapter ends with an outline of the rest of the thesis.

1.1 International Migration: Numbers & Flows

The motivation to leave one's country can be diverse and depends on the situation the migrant is attempting to escape. The decisive factor depends largely on the situation the migrant to-be is attempting to escape or what he/she is seeking to find elsewhere. It can be related to the search for better economic and employment opportunities; the attempt to escape conflict and war; the search for different lifestyles; and the intention to join family already established abroad (Castles & Miller, 2009; IOM, 2013b). Despite the fact that there are many reasons for people to migrate, a considerable number of international migrants is on the move for economic purposes (Castles & Miller, 2009, p. 221). Moreover, even those migratory moves that are not clearly initiated for economic purposes possess an economic dimension.

As Castles and Miller (2009, p. 7) argue, "international migration is part of a transnational revolution that is reshaping societies and politics around the globe". The dichotomy between migrant-sending and migrant-receiving is fading, since most countries now experience both immigration and emigration, although one may prevail over the other. According to the 2013 International Migration Report by the International Organization for Migration (IOM), the traditional focus in migration research tends to be on the flows from low and middle to high-income countries. These (groups of) countries are respectively referred to as the global South and global North by various international organizations such as the World Bank¹. According to the IOM report, this focus on South-North migration originated among others from the emphasis of recent research on the migration and development discourse, which is often coupled with South-North migration and subsequent (North-South) remittances. It is important to keep in mind, however, that by focusing mainly on South-North migration flows we are addressing less than half of international population movements (IOM, 2013b). Table 1 illustrates

¹ The IOM Report points out three main ways of distinguishing between the global South and the global North, as well as a number of implications this has in research. Due to limited space, these implications will not be discussed here. Roughly speaking, according to the World Bank, the global North is comprised of North America (with the exception of Mexico), Europe, Australia, New Zealand, Japan, and a number of states in the Middle East. These countries are the high-income countries. Countries in Central and South America, Africa, Asia (with the exception of Japan), and the Middle East make up the global South.

the main migration corridors within the four pathways and their global migrant share respectively as proposed by the IOM (2013b, pp. 53-55):

Top migration corridors for all the four pathways of international migration		Share in total migrant population
North-North	Germany to the US; UK to Australia; Canada to the Republic of Korea and UK to the US	25%
South-South	Ukraine to Russia; Russia to Ukraine; Bangladesh to Bhutan; Kazakhstan to Russia; Afghanistan to Pakistan	34%
South-North	Mexico to US; Turkey to Germany; China, Philippines and India to the US	35%
North-South	US to Mexico and South Africa; Germany to Turkey; Portugal to Brazil; Italy to Argentina	6%

Table 1 Main migration corridors and global migrant share per pathway

The absolute number that corresponds to the 6% in North-South migration, which is the focus of this study, is of 13 million migrants (IOM, 2013b). Although it is numerically much smaller, the North-South pathway appears to be growing in importance and in size. As reported by the IOM (2013), it is still too early to see these changes reflected in migration databases, but some case studies are illustrative for this trend. One of the “anecdotes” explicitly referred to in the report is, on the one hand, the increased flows of Portuguese emigration to Africa (42% increase over the past decade) and Brazil. On the other hand, Brazil is reported as a middle-income country that has been experiencing growing immigration rates, mainly from Portugal and the United States (IOM, 2013b, p. 77). The report suggests five major motives for the increased North-South flows (IOM, 2013b, pp. 78-82):

- Economic opportunity: the recent economic crisis in the North and a growing demand for skilled labor in the South seems to be partly responsible for the increased flows. According to the Brazilian Ministry of Work and Employment, work permits granted to foreigners in Brazil saw a 64% increase between 2009 and 2011;
- Expansion of global companies: international postings for skilled workers from the North are being created as global companies expand to emerging economies of the South;
- Return migration: although return migration as a consequence of the crisis is often exaggerated in the media, an increase in return migration has been reported in many cases. In Brazil, for instance, 65% of international immigrants were in fact return migrants. In this context, Portugal is appointed as one of the countries that has been sending back more migrants;
- Student migration: growing numbers of international students in the South reflect the diversification of destinations for students, with choices now ranging beyond the traditional receiving countries of the North;

With these two developments in mind – increased North-South migration and increase Portuguese emigration to Brazil – the research presented in this thesis attempts to contribute to the knowledge available about both specific patterns by combining them in this qualitative study.

1.2 *Relevance*

The 2008 global economic crisis had (and still has, I argue) repercussions on various dimensions. Countries and continents were impacted at different levels: while some have had a hard time recovering, others seem to have gone through the crisis relatively unharmed. These uneven impacts have had their reflection on migration flows worldwide. The 2013 World Migration Report (IOM) has already paid some 'official' attention to these shifts, by placing North-South migration "in focus" (IOM, 2013b, pp. 77-84). Despite the fact that the numbers are still relatively small, a clear change is already noticeable. Furthermore, within this new international context, relations between former colonies (which, to a great extent, correspond to low and middle-income countries in the global South) and colonial metropolis (often European countries that were considerably hit by the 2008 crisis) should be taken into account.

1.2.1 *Scientific Relevance*

As argued above, North-South migration flows have started gaining more attention in the past few years. A significant number of articles and reports have been written on increased Portuguese emigration, increased immigration in Brazil, and the impacts of the economic crisis on migration flows in general. Although many statistical sources offer data on the impact of the crisis on unemployment worldwide, on the number of international migrants, and on the increased North-South flows, there is still very little knowledge about the migratory processes initiated in response to the crisis. For instance, in relation to the increased rates of Portuguese emigration, most articles found during the literature review for this thesis reinforced the European character of the new wave of Portuguese emigration. Portuguese immigration in Brazil has seen a 96% increase in 2011. If we look at the absolute numbers, however, this destination cannot be seen as a major destination. Nevertheless, this increase shows that despite difficulties and bureaucracies regarding the need for work permits, visa, and diploma recognition, a growing number of young highly-skilled Portuguese are opting for Brazil in this post-crisis era. However, other than acknowledging the growing numbers in migration flows, research has not studied why people chose Brazil or how their process has developed and how they have felt welcome in Brazil.

Furthermore, the theoretical approach on which this particular case study builds suggests that migration takes place within migration systems interlinked through a wide variety of 'linkages'. According to this theory, a shared historical-colonial context should be seen as a strong factor that might create and maintain a system of migration between countries. However, relatively little seems to be known about migration systems that build on colonial ties. This thesis also attempts to contribute to the theory of migration systems by offering a case study of migration that clearly builds on these specific ties.

In sum, the migration flow from Portugal to Brazil needs to be studied qualitatively in order to identify what attracts this new wave of emigrants to Brazil despite greater legal difficulties and geographic distance from home in comparison to inter-European migration. Through a qualitative approach I hope to identify the importance still attributed to the historical, cultural, and linguistic linkages to choose Brazil, and how migrants feel these historical linkages facilitate or hinder the situation of being an immigrant in the country. Such an approach to this new flow will also contribute to the existing knowledge of current North-South migration as well as of the personal relations

between Portuguese and Brazilians.

1.2.2 Societal Relevance

In the 1980s, following accession to the European Union, Portugal became for the first time in its history a country of immigration (Machado, 2012). Around the same time, Brazil, typically known as a “traditional country of immigration”, started experiencing higher emigration rates (Amaral & Fusco, 2005)². A considerable share of this new Brazilian emigration was directed towards Portugal, especially from the 1990s onwards (Patarra, 2005). By 2010, the largest immigration group in Portugal was Brazilian (Horta, 2011). The economic crisis, however, has changed migration flows between Brazil and Portugal once again. There has been an increase in return migration from Portugal to Brazil (Fernandes et al., 2011), as well as in the flows of Portuguese emigration to Brazil.

From this perspective, it seems relevant to investigate how the changes in migration flows impact and change the inter-personal relationships between Portuguese and Brazilians. As Feldman-Bianco (2010b) argues, colonial powers, including Portugal, continue to employ the distinction between colony and colonizer in the construction of the own nationality, which indicates the importance of these historical ties not only on the migratory patterns and decisions, but also at the individual level (see also Chapter 4). Therefore, I argue a qualitative study of the interpersonal relations between Portuguese immigrants in Brazil in the 21st century might shine a new light on these relationships.

Although the focus of this research is on the personal level, such studies might contribute to better diplomatic relations between countries with a shared history. I hope studies like these serve to increase consciousness about the dynamics of this linear and dichotomous thinking based on the colony-colonizer discourse. In many ways, a better understanding of this way of thinking might improve cooperation and relations at many levels, including diplomatic as stressed above.

1.3 Research Objective & Question

Following the introduction to the topic provided in the previous section, which dealt mainly with the global context of the 2008 economic crisis, it is important to point out that the focus of this thesis is precisely on the growing highly-skilled Portuguese emigration to Brazil as the result of a revival of old destination countries. The research objective and question that guided this research are as follow:

1.3.1 Research Objective

The aim of this research is to contribute to the existing knowledge on crisis-led North-South migration through a qualitative analysis of the migratory process of young highly-skilled Portuguese immigrants in Rio de Janeiro, Brazil.

This will be done by approaching the migration flow in case through the lens of Migration Systems Approach (see Chapter 2). Following the chosen approach, a special focus on two dimensions (linkages) of Portuguese-Brazilian relations will be addressed in the analysis:

1. Mass cultural connections between Portugal and Brazil: mainly cultural similarity; Brazilian media diffusion and cultural products in Portugal; and societal acceptance of migrants;
2. Regulatory linkages of all kinds and how Portuguese emigrants perceive their migratory

² See also Chapter 5.

process to have been in regard to policies and regulations that govern immigration in Brazil.

1.3.2 Research Question

The research question that follows from the research objective and the Migration Systems Approach lens is:

To what extent does recent young, highly-skilled Portuguese migration to Brazil transform the historical asymmetrical relations between former colonial metropolis and former colony in the 21st century from an everyday life perspective?

In order to answer this research question, a number of aspects are to be taken into account, mainly based on a number of historical aspects and more 'modern' linkages between the countries. These range from the mass cultural connections between both countries to the regulatory linkages, such as treaties, agreements, and exceptions that are in place in each country to facilitate or hinder immigration. The interview held during the fieldwork also focused on the expectations of Portuguese migrants prior to the start of their migratory process: how did actually expect existing historical, cultural, and linguistic ties to facilitate their process of migrating. Together with the apparent complementarity of their skills in the Brazilian labor market³ (or their expectations of a complementarity), these aspects should be taken into account in order to answer the question posed above.

1.4 Outline of the Thesis

This thesis is composed by a total of seven chapters, of which the present introduction is the first one. The second Chapter will provide the theoretical framework for this thesis, and should therefore be perceived as the 'backbone' for this work. In this chapter, I will briefly outline the most commonly used migration theories, which are strongly economic of nature, and have therefore been named 'economic theories'. After that, I will explain the approach chosen for this research, namely Migration Systems Approach, and follow with an outline of the Lusophone migration system.

Chapter 3 explains the methods and techniques applied in the research conducted as well as reflexive notes on the fieldwork and the sampling of respondents.

Chapter 4 presents the historical background of Luso-Brazilian relations, ranging from the emergence of the Portuguese Empire in the 15th century, through the history and importance of 'colonial Brazil' and the diplomatic relations between both countries in the 20th century, to the importance of the idea of 'Lusophony' for Portugal and in its relations with other Lusophone countries.

Chapter 5 offers a sketch of the histories of migration in/between Portugal and Brazil as the traditional members of the Lusophone migration system (see Chapter 2).

Chapter 6 contains the analysis of the interviews conducted in Rio de Janeiro during my two month fieldwork in the first half of 2014. The analysis has three dimensions: the more general aspects that came up during the interviews, but were not always intentionally questioned; the mass cultural connections between both countries; and the regulatory linkages. The last two dimensions build on the theoretical approach chosen for this thesis.

In Chapter 7, I then present the conclusion and answer the research question presented above.

³ Brazil is considered by many to be an emerging economy (Carrasco & Williams, 2012). As such, it has also gone through the crisis relatively unharmed when compared to other countries. In fact, due to this resilience, it has also seen its skilled labor demand grow. This will be better explained in Chapter 5.

2. *Theoretical Framework*

In this second chapter, the theoretical perspective employed to study, understand, and explain the phenomenon of North-South migration will be set out. The theoretical approach used in studying a topic allows us to prioritize a particular aspect of it. In this case I argue this means the historical-colonial context of migration flows between Portugal and Brazil. Because of the aim and scope of this research, I will employ Migration Systems Approach as its ‘backbone’. Studying international migration flows from this perspective means approaching it in a more encompassing way than generally done from the most common theories, which have a strong economic background. However, due to the economic context in which the case study of this thesis takes place – namely the global financial crisis – I find it essential to briefly explain the main economic theories of migration before setting out the approach chosen to study the recent Portuguese emigration to Brazil.

As will hopefully become clear in the next sections, the approach chosen for this case study reflects my perception, also emphasized by Castles and Miller (2009), that the migratory process is shaped by a complex set of factors and interactions. Migration is a collective action and affects both sending and receiving countries at the economic, political, social and cultural levels. For this reason, the study of migratory patterns should be undertaken from an interdisciplinary perspective, in order to take these different dimensions into account while examining the whole process.

2.1 *Economic Theories*

In this section, a brief outline of the three most important economic theories on migration will be provided. Attention is given to neoclassical economics, new economics of labor migration, and dual labor market theory. At the end, a brief summary on these theories will explain why a purely economics approach is insufficient to explain migration flows between Portugal and Brazil.

2.1.1 *Neoclassical Economics*

Neoclassical theory is still of great importance in economics and, as such, it has also had a considerable impact on migration studies (Castles & Miller, 2009). The first ideas on migration that follow this neoclassical perspective stem from the 19th century. They offered general assumptions that were not based on any actual migratory pattern. These approaches are also referred to as ‘push-and-pull’ theories since they view migration as an interaction between existing ‘push’ factors that repel people from their country of origin and ‘pull’ factors that attract them to another country or region. According to Massey et al. (1993), neoclassical economics proposed to explain international migration both at the macro and the micro level. At the macro level, it tried to explain labor migration in the process of economic development. According to this theory, (international) migration takes place due to geographic differences in labor supply and demand. In countries with a labor demand wages tend to be considerably higher than in countries with an excessive labor supply, making it attractive for people from capital-poor/labor-rich countries to migrate to capital-rich/labor-poor countries. In economics, the belief is that this will eventually lead to an equilibrium in the marketplace (Borjas, 1989; Massey et al., 1993). Portes and Böröcz (1987) go as far as to argue that the origins of

international migration are explained by the neoclassical approach as the "outcome of poverty and backwardness in sending areas".

If, on the one hand, at the macroeconomic level neoclassical theory on migration attempts to explain that migration takes place due to push-and-pull factors, most of which based on economic reasons, the microeconomic model on the other hand emphasizes the maximization of utility by individuals (Borjas, 1989; Massey et al., 1993). Borjas (1989) argues individuals base their decision to migrate on what all the existing alternatives may bring. They do this by trying to choose the best option given the financial and legal constraints that regulate the process of migrating, e.g. the financial situation of the individual as well as regulations imposed by sending and receiving countries. Migrants are seen as rational beings that strive to maximize their utility by choosing the country that maximizes their well-being. According to this perspective, migration processes can be reduced to "immigration markets" in which information is exchanged and "migration offers" by host countries are compared (Borjas, 1989, p. 461).

Neoclassical migration theories have dealt with a fair share of critique. They have been accused of being incapable of explaining current flows as well as of predicting the emergence of new ones (Castles & Miller, 2009; Portes & Böröcz, 1987). Portes and Böröcz (1987) also criticize the assumption that migration flows emerge simply due to existing inequalities worldwide, something that seems to be intrinsic to this theoretical perspective. Furthermore, the assumption that migrants to-be have access to the newest and most accurate information does not seem reasonable. The information pieces that reach those willing to and capable of migrating are often incomplete and outdated (Portes & Böröcz, 1987). Moreover, research has shown that it is often not the poorest people who migrate, contradicting the idea of an equilibrium that should be attained according to the push-pull model predictions (Castles & Miller, 2009). In an attempt to enrich the study of migration, social science research has been showing the importance of taking other aspects into account, such as historical experiences, existing social capital (family and community dynamics) both in the destination country and the country of origin, and the collective decisions that are taken during the whole process.

2.1.2 New Economics of Labor Migration

The theory referred to as New Economics of Labor Migration (NELM) developed out of neoclassical theory and also focuses on rational choice as the keystone in the process of migration (Arango, 2000). What distinguishes both theories is the focus of NELM on migration as a collective strategy of income diversification rather than an individual decision aimed at income maximization (Arango, 2000, p. 288). Massey et al. (1993, p. 436) explain this focus on a diversification strategy by outlining differences between developed and developing countries regarding insurances and credit markets, which tend to be absent or inefficient in the latter. In this way, sending some family members abroad is perceived by families as a way of guaranteeing a steady income in the guise of remittances in case other family members are laid off or in case of a poor harvest.

Although the focus on the collective decision-making process shows a supposed 'improvement' from the more classical perspective on migration based on the individual pursuit of income maximization, NELM is solely concerned with the causes of migration in sending countries (Arango, 2000). This shows a lack of attention for the receiving side at the same time that it still leaves the cultural, social and political dimensions of migration untouched. To a great extent, it is still mostly in line with the neoclassical approach.

2.1.3 Dual Labor Market Theory

Dual Labor Market Theory⁴ (DLMT) represents an attempt at encapsulating more dimensions into economic research on migration (Castles & Miller, 2009, p. 23). According to DLMT, international migration is a response to labor demands by advanced economies (Massey et al., 1993). This labor demand applies to both high-skilled and low-skilled jobs, although highly qualified migrants are traditionally welcomed in developed societies under much better conditions than low qualified workers, who frequently even end up entering their new countries illegally (Wilson & Portes, 1980). According to Massey et al. (1993, pp. 441-444), migrants are more likely to enter and remain in the secondary labor segment because they accept lower wages. One of the main reasons for this is the fact that migrant workers tend to see bottom-level jobs as a means of acquiring income which is in principle disentangled from any kind of status or prestige so typically important in advanced economies. According to DLMT, another aspect that increases the need for migrant labor is the rise of female participation in the labor force in advanced economies. For the past decades women have also started to look for prestigious job positions in the labor market, putting career and better salaries first and opening up more space in the lower sectors of the economy.

In contrast to neoclassical and NELM theory, DLMT focuses strictly on the macro-level of the migration process (Massey et al., 1993). It emphasizes the importance of labor migration to fulfill the structural labor demand in advanced economies (Arango, 2000). However, as Arango (2000, p. 290) points out, its clear focus on the demand side could not possibly explain the whole migratory process. Also, recruitment practices nowadays are non-existing in many countries and many migrants move on their own initiative.

2.1.4 The Shortcomings of Economics

The most commonly applied theories on international migration in past decades originated from the discipline of economics. As such, they tend to leave a wide number of relevant factors out of the examination of migratory processes. The table below provides a recapitulation of the main characteristics ascribed to the three most important economic theories on migration that have been discussed above.

	Individual/collective	Demand/supply	Macro/micro level	Multi/one-dimensional
NCE	Individual	Supply	Macro/micro	One-dimensional
NELM	Collective	Supply	Micro	One-dimensional
DLMT	Individual	Demand	Macro	Multi-dimensional

Table 2 Main characteristics of the economic approaches to international migration

On the one hand, NELM and DLMT can be perceived as broader options for neoclassical theory since they at least take either the collective aspect or multiple dimensions of the migration process into account, respectively. On the other hand, however, neither one of these theories offers an encompassing view of the migratory process that pays any attention to the interplay between different aspects of the migrant trajectory while at the same time taking the collective and the individual, the supply and demand sides into account. Furthermore, there is no reference to be found

⁴ DLMT is also known as Segmented Labor Market Theory (Castles & Miller, 2009)

in the literature on these theories about the importance of the historical and cultural dimensions to migratory movements, which appears to emphasize the strong – and as it appears, sole – focus on the importance of economics in the decision-making process that precedes migration according to all three perspectives. Theories that emerged from social sciences and geography over the past few decades, on the other hand, offer a broader perspective of analysis that takes individual, collective, historical, socio-cultural, and economic aspects into account. Despite the fact that the migratory movement examined in this study takes place within the context of a severe economic crisis, I argue it is necessary to examine other aspects, mainly – but certainly not exclusively – because of the strong historical ties that exist between the two countries that make up the case study. The lens that has been chosen to achieve such an analysis is that of Migration Systems Approach, which will be explained in the next section.

2.2 Migration Systems Approach

As argued above, many perspectives on international migration have been developed throughout the years. Some of them have adopted a more historical or socio-cultural perspective, while others focused on migrants' networks and their social capital in destination countries. This thesis will analyze the contemporary migration flows between Portugal and Brazil through the lenses provided by Migration Systems Approach (MSA). Since this is a thesis on human geography, it is interesting to start by mentioning that MSA has its roots in geography. It was first coined by Akin Mabogunje in the 1970s in the context of rural-urban migration in Nigeria (Castles & Miller, 2009; Mabogunje, 1970). The main intention of approaching migration from a systems theory was to achieve an understanding of the dynamics and the spatial impact of the migration process (Mabogunje, 1970, p. 2). From this perspective, what would be addressed is the role of migration in transforming economic and social structures in sending (rural) and receiving (urban) areas (Kritz & Zlotnik, 1992). Other scholars in the 1980s and 1990s had also acknowledged the need for a systems approach. According to Kritz and Zlotnik (1992), for instance:

Consideration of the causes or impacts of international migration from either a sending- or receiving-country perspective often fails to convey the dynamics associated with the evolution of the flow, from its origins, through the shifts in its composition and volume as it matures, taking account of return migration and remittances, and of the policy and structural conditions at origin and destination that shape migration (Kritz & Zlotnik, 1992, p. 2).

According to some definitions, a migration system is characterized by a group of core receiving countries and a group of sending countries that are connected to each other through large flows and counterflows of people (Massey et al., 1993). Besides the exchange of people, a system is also characterized by several other linkages, such as the exchange of goods and capital. These exchanges tend to be larger and more important between countries that constitute a migration system than between countries that do not form a system (Massey et al., 1993).

Kritz and Zlotnik (1992) define a migration system slightly differently as a group of *at least two countries* that exchange relatively large numbers of migrants with each other. This definition emphasizes the *exchange* of migrants within a system, which is based on the authors' perspective that people move in both directions since feedback and adjustments taking place within the system

due to internal or external changes might impel new responses from people within it. This means that, within a system, numbers and directions of flows change according to different factors, such as economic conjunctures. As can be seen in Figure 1, not only is the context – political, demographic, economic, and social – important because of the setting it forms in which a migration system emerges and persists, but different kinds of linkages between countries also play an important role. Furthermore, the authors point out that population exchange between countries in the system is not necessarily limited to permanent migrants, workers or refugees, but it may also include students, military, business men, and tourism since these temporary visits to a new country might form the basis for longer or even permanent settlement (Kritz & Zlotnik, 1992, p. 3).

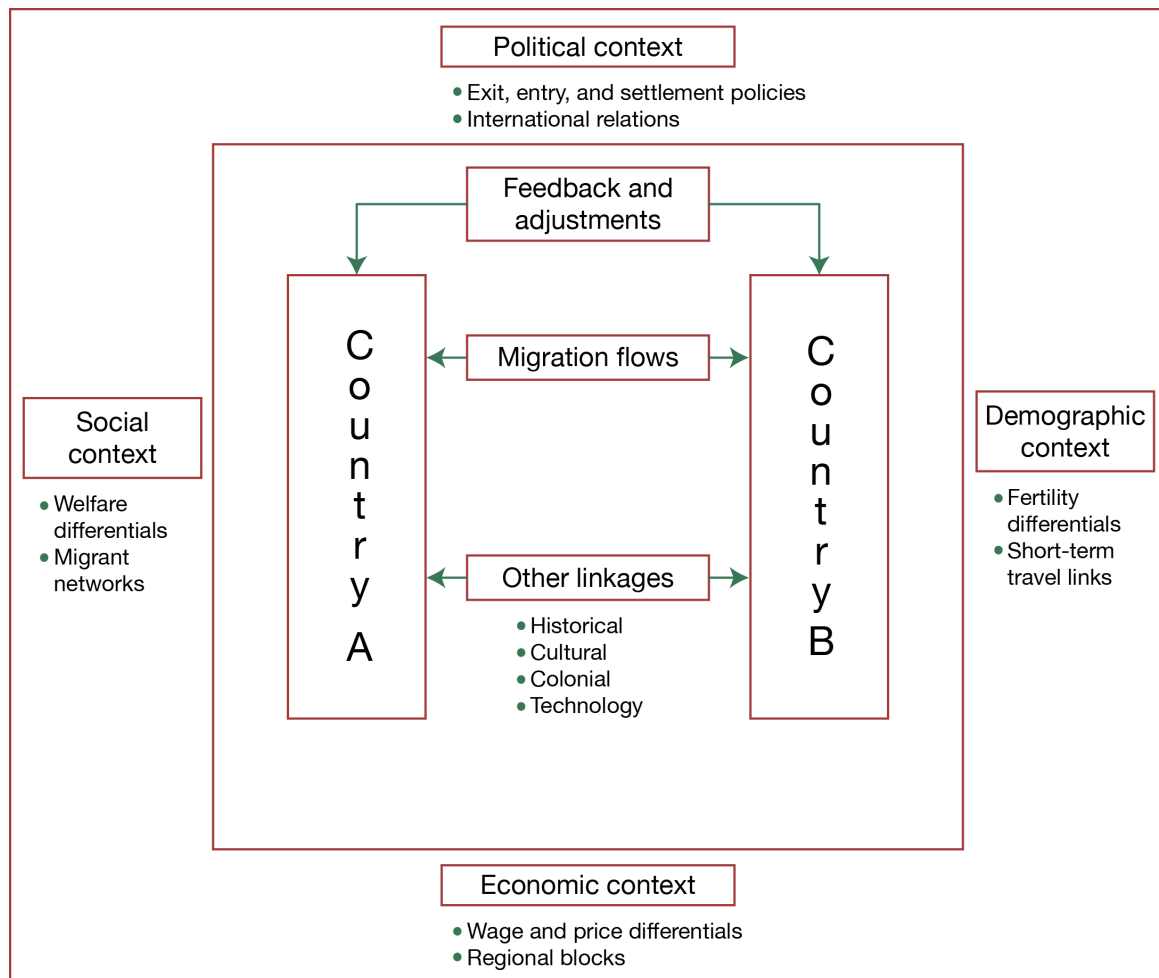


Figure 1 Systems framework of international migration

According to Fawcett (1989), adopting a migration systems framework for the study of international migration has six main advantages over other theories and approaches:

1. It pays attention to both ends of the flow, explaining stability and mobility in each location;
2. It examines a flow in the context of other flows, thus many possible destinations in relation to each other;
3. It highlights the various linkages between places, including flows of goods, ideas, and people;
4. It suggests comparisons between places, emphasizing disparities and imbalances within a system;

5. It focuses on the interconnectedness within one system, explaining in this way how one part is sensitive in changes in the other;

6. It reinforces the view of migration as a dynamic process.

Moreover, Fawcett (1989) proposes different categories and types of linkages within a migration system. These different linkages will be explained in the next section.

2.2.1 Linkages in Migration Systems

Fawcett (1989) distinguishes three types and four categories of linkages. The author presents this in a conceptual framework, reproduced below in Table 3. In the following paragraphs I will explain per cell what the linkages entail based on Fawcett's (1989, pp. 673-678) typology. After that, I will also explain which set of linkages have been analyzed in this study – and why.

		Categories of Linkages			
		State to State Relations	Mass Culture Connections	Family and Personal Networks	Migrant Agency Activities
Types of Linkages	Tangible Linkages	Trade and financial flows Bilateral economic and technical assistance	International media diffusion (print, TV, film)	Remittance flows Correspondence from migrants	Job recruitment and promotional materials Officially channeled remittances
	Regulatory Linkages	Immigration and emigration policies Temporary worker policies	Norms governing out-migration Societal acceptance of immigrants	Family obligations Community solidarity	Rules and regulations governing migration process Contracts with migrant workers
	Relational Linkages	Complementarity of labor supply and demand Economic dependency	Cultural similarity Compatibility of value system	Relatives social status of migrants and non-migrants	Complementarity of agency activities in sending country and receiving country

Table 3 Conceptual framework of linkages in a migration system

The *Tangible/State to State* linkages revolve around the polity and economy of a nation-state. These linkages should be perceived as the material manifestation of trade relationships in the form of flows of goods and money between countries. The *Tangible/Mass Culture Connections* linkages entail mainly mass communication products such as newspapers, films, magazines and television shows. These media can influence ideas and images about a certain place and country. According to Fawcett (1989), the most important aspect of these media is the information they spread about regions, countries and cultures. *Tangible/Family and Personal Networks* refers to any tangible contact between migrants and their social network, such as remittances, presents and written communication – which nowadays takes place often through the internet as will be explained later on in this chapter. *Tangible/Migrant Agency Activities* is about materials distributed and published by and for migrant agencies, as well as remittances sent through official agencies.

Regulatory/State-to-State Relations includes policies regulating both immigration and emigration. Other regulations that govern other flows, such as trade, can also be accommodated in this section. *Regulatory/Mass Culture Connections* are social norms, in particular those regulating the societal acceptance of migrants and outmigration. These norms can be very effective in constraining or facilitating migration. *Regulatory/Family and Personal Networks* entails person-to-person obligations within the family that may result in family or chain migration. Ethnic, friendship or family obligation may even result in hiring preferences within immigrant enclaves⁵. *Regulatory/Migrant Agency Activities* are the rules and procedures practiced by agencies in their contacts with migrants. Legal contracts can also be included in this section. Relational linkages are proposed after comparison with two or more places and conditions. They are, as Fawcett (1989, p. 677) argues, “conceptual connections” in the minds of the researcher as well as in those of the (potential) migrants.

Relational/State-to-State linkages entail economic and political relations of dependency, as well as the complementarity of labor supply and demand or differences in levels of development. *Relational/Mass Culture Connections* encompass the cultural similarities between countries within a migration system, such as language, education, and the compatibility of the value system. Fawcett (1989) argues a good example of these shared values and commons is seen in countries that share a historical colonial relationship. *Relational/Family and Personal Network* linkages revolve mainly around the social status of out-migrants and returned migrants as opposed to that of potential migrants. Finally, *Relational/Migrant Agency Activities* is concerned with the extent to which activities at both ends of the migration system are complementary, meaning the extent to which promotional efforts by agencies are realistic and do not create false expectations for possible future migrants.

Fawcett and Arnold (1987, p. 457) explained in an earlier article that the linkages proposed should be perceived as “conditions that influence individual immigration decisions”⁶. I understand this by meaning that not all conditions are applicable to all cases and contexts of each individual’s decision. Partly based on this, I argue not all the linkages and aspects that are presented in the table proposed by Fawcett (1989) are relevant to my case study, since the extent to which the characteristics apply depends on the kind, the length and the nature of the relationship between countries, as well as on the present global context. Furthermore, analyzing all the possible linkages would require more time to conduct economic and legal research than available for this master’s research.

However, the conceptual framework proposed by Fawcett (1989) to study international migration is still in line with what I believe should be adopted to study the current flows of Portuguese immigration in Brazil. Based on the historical-colonial, political, and economic context in which the migration flows in question take place, a number of linkages has been selected. The focus of this research will be on the **mass cultural connections** and on the **regulatory linkages** and how these two particular sets of linkages have influenced the decision-making and the integration process of new Portuguese labor migrants in Rio de Janeiro. In order to facilitate the proposed analysis, I will conceptualize both sets as ‘sets of linkages’, thus without holding on to the distinction proposed by Fawcett (1989) between categories and types of linkages. In sum, in order to analyze the current flow of Portuguese emigration to Brazil, I will approach the model proposed by Fawcett (1989) by focusing on both axis as emphasized in table 3: the Mass Culture Connections axis (‘y-axis’ of the

⁵ For further reading on the topic I recommend Wilson and Portes (1980) on their question in relation to the ease with which newly arrived Cuban emigrants are incorporated into the Cuban enclave economy in Miami.

⁶ In this first joint article, only the categories State-to-State Relations, Mass Culture Connections, and Family and Personal Networks were mentioned.

table) and the Regulatory Linkages ('x-axis'). A number of aspects placed within these axes stand out and will be analyzed based on the Luso-Brazilian relations and the data gathered during my fieldwork in Rio de Janeiro, namely:

- International media diffusion (print, TV, film) ;
- Societal acceptance of immigrants ;
- Cultural similarity ;
- Compatibility of value system ;
- Immigration and emigration policies ;
- Rules and regulations governing migration processes;
- Contracts with migrant workers.

The next subsection will explain why I argue these specific aspects are important in the migration system studied in this thesis.

2.3 *The Lusophone Migration System*

Of great importance in this thesis are the colonial ties from which migration systems may arise. As Kritz and Zlotnik (1992, p. 5) argue, the remains of the colonial era still shape international migration. The focus of academic research in the approach of such 'colonial systems', however, is often on South-North paths, which ignores the dynamic character of most systems (e.g. the *exchange* of migrants as pointed out above). Such an approach fails, in my view, to stay true to the MSA perspective on international migration that emphasizes the exchange of people between countries that constitute a system. Furthermore, in the literature review that preceded the actual field research for this thesis, few examples were found of studies on migration systems based on colonial ties. In fact, the Lusophone migration system (LMS) seems to be one of the best and more frequently studied systems of migration based on the number of articles found on the topic⁷.

Baganha (2009) argues, basing herself on the work of Kritz and Zlotnik (1992)⁸, that migration between Lusophone countries meets the requirements to be considered a system. Firstly, it should be considered a system, because Portugal, Brazil and the PALOP⁹ countries exchange a significantly large number of migrants with each other. Secondly, this exchange goes beyond the exchange of people to include flows of goods, foreign investments, remittances, development aid, and phone calls. Thirdly, a web of historical, cultural, linguistic, and colonial ties between these countries and Portugal serves to strengthen existing ties even further. Finally, bilateral agreements between Portugal and its former colonies give serve to strengthen the system even further. In sum, we could argue that migration between Portugal, Brazil and other Portuguese speaking countries takes place within a migration system that builds on significant historical ties (Baganha, 2009; Góis & Marques, 2009).

Although the Lusophone migration system is perceived as a strong and stable migration system, its dynamic character also attracts attention. First of all, it is strong and stable because the movement of people between Portuguese speaking countries has been taking place for centuries, despite the

⁷ It is important to take into account that most of the articles found on migration between the Lusophone countries were from a Portuguese perspective. From what I could find, little research seems to have been conducted in the past years in Brazil on the current Portuguese immigration for instance (regardless of the theoretical approach). Brazilian research focuses on Brazilian emigration in general (although quite often on migration to the United States), or on the historical influence of immigration in the country. In my view, current immigration flows remain largely unstudied.

⁸ Reference is being made in this case to the book *International Migration Systems: a Global Approach*.

⁹ PALOP (Países Africanos de Língua Portuguesa) stands for Portuguese-speaking Countries in Africa and comprises the following countries: Angola, Cape Verde, Guinea-Bissau, Mozambique, and São Tomé e Príncipe. All the countries were former Portuguese colonies.

fact that for a very long time the flows were mainly between Portugal and Brazil, which are therefore often seen as the “traditional” members of the system (Baganha, 2009). After 1974, the independence of the African colonies from Portugal enlarged the system, as evidenced by the great increase in the flows of African immigrants in Portugal (see Chapter 5). The origin and numbers of migrants in Portugal changed drastically from then onwards: in the 1950s, there were around 21.000 immigrants in Portugal, of which 72% were European and 18% Brazilian; ten years later, there were almost 30.000 immigrants in Portugal, of which 67% were European, 22% were Brazilian and only 1,5% were of African origin (Marques & Góis, 2011, p. 216). Between 1975 and 1980, however, the total immigrant population in Portugal grew from 32.000 to 58.000, of which a significant 48% were from African origin (and 98% of them from the former Portuguese colonies). Besides this dynamism, the system is also characterized by its strength, which relies on the continuous exchanges between Lusophone countries. According to Baganha (2009), not only is trade between Portugal and other Lusophone countries of considerable size, it is also expected to grow¹⁰. Furthermore, migrant networks and informal organizations promote and facilitate migration between Portuguese speaking countries, as do bilateral agreements between Portugal, Brazil and the PALOP. In 2009, 318 agreements covered social, economic, cultural, and political areas – from trade to energy, education, social security, health, justice and friendship (Baganha, 2009). Of these 318 agreements, seven of them dealt specifically with migration between the countries.

In sum, the Lusophone system is a stable migration system, but its dynamic character should not be ignored, since it is, I argue, an important characteristic. First of all, the system went from including only two countries, Portugal and Brazil, to including at least three by clearly incorporating Angola. As Marques and Góis (2011) argue, it went from being “bicephalous” to being at least “tricephalous”. According to them, the African strand of the system seems to be gaining in importance through Angola, while the European (Portugal) loses its more central position and the Latin American (Brazil) stabilizes. Secondly, although Portugal is sometimes perceived as the core country in the Lusophone migration system (Baganha, 2009), some authors argue that Portugal is a particularly difficult case to study due to its incorporation in different migration systems in which it occupies different places in each system. This would give it a semi-peripheral position rather than a clearly central one (Góis & Marques, 2009). Not only is Portugal inserted in the Western European migration system, a system within which several countries are perceived as possible destination countries by Portuguese emigrants (see also Chapter 3), but there have also been large waves of emigration from Portugal to North-America (Brettell, 2003; Marques & Góis, 2011). Based on the concluding point made by Marques and Góis (2011), I would also argue that Portugal should not be seen as a core country in the Lusophone system, but rather as *one* of the cores, allowing Brazil (and more recently Angola) to share the central position. Angola has been experiencing great economic growth, which has served to shift its migratory flows with its former ‘motherland’, increasing Portuguese immigration in Angola as well for the past couple of years (Malheiros, 2011). ‘Multipolarity’ is what seems to characterize the Lusophone migration system nowadays.

This research proposes to study the personal experiences of Portuguese immigrants in Brazil in the 21st century. For instance, as has been argued here, a considerable number of agreements between Lusophone countries are supposed to make exchanges of all kinds easier between

¹⁰ I do not wish to put up for discussion here whether the 2008 economic crisis has impacted this prognosis, since the focus of this research is not on the economic or legal Luso-Brazilian relations.

countries. Furthermore, the cultural connections between both countries are still very strong and present. This is especially the case for Brazilian culture in Portugal. In sum, I believe it is crucial to study the two traditional core countries in the Lusophone migration system in order to answer the question as to whether shifting global forces in the context of the crisis are changing relations between two countries at the personal and individual level.

2.4 On Migration in the Information Age

Before continuing with the various flows of migration between Portugal and Brazil as the traditional members of the Lusophone migration system, and the mass cultural and regulatory linkages that shape these flows, I believe a brief remark is at place on the impact of new developments and improvements in Information and Communication Technology (ICT), the Internet, and social media for they have had an important impact on migration (processes).

The current "Information Age" seems to have us all continuously interconnected (Castells, 2010). In the 1990s, new crucial developments in computing and telecommunications, together with increased access to Internet, induced a transformation from decentralized microcomputers to pervasive computing by interconnected information-processing devices. From then on, the whole world was to be organized around a telecommunicated network of computers (Castells, 1999).

The fact that new and better media of telecommunication are now widely available facilitates the personal experience of the migratory process, because it offers a way of reducing the emotional distance between who leaves and who stays behind (Stalker, 2000, p. 118). Due to these fairly new forms of fast communication, migrating nowadays does not necessarily mean breaking existing social and cultural ties (Hiller & Franz, 2004). The declining costs of international phone calls in the 1990s, for instance, was one of the reasons why migrants have increasingly been able to stay in touch with networks in the country of origin. In this sense, "low-cost calls serve as a kind of social glue connecting small-scale social formations across the globe" (Vertovec, 2004). Despite the fact that there might still be (mainly infrastructural) inequalities in the accessibility to ICT – Mahler (2001) shows how this was the case for telephone lines – the existing communication network infrastructure has seen a leap forward worldwide (ITU, 2003). Between 1998 and 2003, the number of countries connected to the internet grew from encompassing merely eight countries to nearly every country in the world.

Nowadays, research on the impact of the Internet and "new media" on international migration already emphasizes the role played by social media. Dekker and Engbersen (2013), for instance, conclude that social media are transforming migration networks by facilitating the process of moving to another country. Social media not only serve personal communication: it has also been extensively used to distribute information, going beyond the traditional one-to-one communication tool and allowing a transformation of the structure of the communication and the type of information shared (Dekker & Engbersen, 2013). As argued by several authors, diaspora communities are turning to the Internet, and I argue to social media in particular, to maintain and strengthen ties with the country of origin (Adams Parham, 2004; Van den Bos & Nell, 2006). In an attempt to summarize the importance of social media for contemporary migrants, the following quote:

Social media usage enables a passive monitoring of others, through the circulation of voice, video, text, and pictures, that maintains a low level mutual awareness and supports a dispersed community

of affinity. This ambient, or background, awareness of others enhances and supports dispersed communities by contributing to bonding capital. This may lead to substantial changes in the process of migration by slowing down the process of integration and participation in host societies while also encouraging continual movement of migrants from one society to another (Komito, 2011, p. 1075).

Phrases such as the “annihilation of space” and the “death of distance” (Cairncross, 1977, as cited in Komito, 2011, p. 1075) are often mentioned as effects of new ICTs and express the idea that distance does not form a barrier for communication between people anymore. Mainly therefore it seems unconceivable to ignore the effects new communication technologies in a study on international migration flows.

3. Methodology

I would like to start this methodological chapter by pointing out that, to a certain extent, the topic of this research was determined by my personal knowledge of the language and the culture of both countries as well as my (personal) interest in Portuguese-Brazilian relations. Other than that, I also had some contacts in Rio de Janeiro that could be helpful during my fieldwork.

Before going into the strategies and methods applied in this research, I feel it is important to briefly shape the setting in which the research for this thesis was conducted. The data for this study was collected during a two month fieldwork in Rio de Janeiro, Brazil, from April to June 2014. There were two main motives to choose for Rio de Janeiro as a location for my fieldwork (other than my personal contacts in the city). Firstly, the historical presence of the Portuguese in the city since the beginning of colonization, and even more strongly from 1808, when the royal family moved to Rio de Janeiro while fleeing from Napoleon's troops (Bieber, 2001)¹¹. Second, because of the appeal Rio de Janeiro has on people from all around the world: there is a reason why the city is nicknamed the Marvelous City (*Cidade Maravilhosa*). The city also tends to be the setting for many movies and Brazilian soap operas, which are widely broadcast in Portugal (see also Chapter 3).

This chapter thus explains the research strategy and methods applied throughout the process. The following subsections will deal consecutively with the research setting, strategy, design, methods, sampling of respondents, and the analysis of the data.

3.1 Qualitative Research

Due to the nature of this research, which presents a case study of North-South migration, I chose to apply a qualitative strategy. This choice was based on two main aspects of the migratory patterns. First, other than the crisis as a main motivator for the increase in North-South migration flows, relatively little is known as to why exactly migrants decide to move and to where¹² as well as how their experiences have been. Second, I believe this 'gap' in knowledge can only be filled through in-depth research with immigrants in the new countries, since it is important to allow people to present their own perspective on the whole process of immigration. Qualitative research offers the possibility of investigating relevant topics, such as: previous networks in the country of destination; other countries that were considered before emigration; previous stays abroad; and possible cultural, familiar or professional connections in the destination country. These are all questions and themes that cannot be answered nor approached through a quantitative lens, but which would increase the knowledge on this fairly recent aspect of international migration. This positive perspective on what qualitative approaches can bring to the study of international migration was also defended by Findlay and Fi (1999, pp. 54-56), although more in relation to the application of mixed-methods (both quantitative and qualitative methods). As they summarize their research on migration to and from Hong Kong after the sovereignty transfer from Britain to China in 1997, they conclude that qualitative

¹¹ If compared to the cities in the South of Brazil, where German and Swiss immigration was more important, Rio de Janeiro still has many Portuguese influences. I argue this presence can be seen and felt in the architecture of the city, especially the city center for example, but also in the family names of people (less Italian and German influences).

¹² We could pose the following questions for example: Why Brazil and not Angola? Why Brazil and not another emerging economy? Why Brazil and not another European country? See also Chapter 5 for more on this aspect.

interviews, were useful in order to discover that “international migration is a process which not only is regulated by international migration legislation, but also by ‘self’ as potential migrants who make decisions about migration behavior in relation to interpretations of their ethnic identities and of their perceptions of the identities of ‘other’ places”. Thus, although the authors argue a purely qualitative approach does not provide all the answers in the study of migration, it does add value to existing knowledge, which in their case was also previously obtained through statistical analyses.

In relation to the case study presented in this thesis, quantitative (i.e. statistical) studies have been conducted on the increase of immigration in Brazil, on the increase in Portuguese emigration in general, and on shifts in labor mobility worldwide. Needless to say, the quantitative strategies applied in most studies on the recent post-crisis changes in international migration patterns are all relevant and much needed. Without the numbers produced by many statistical databases and international organizations, we would still be questioning whether the economic crisis has led to worldwide changes in migration flows or not (see also Castles and Vezzoli (2009)). However, a strict focus on numbers, both relative and absolute, does not take into account many linkages and connections between people in different countries – one may say also between migration paths – that can only be explained by a thorough questioning of the immigrants in case.

At the bottom of the choice for the research strategy employed in this study lays the difference between positivism and interpretivism. While positivism strives to apply scientific models of study to the social world (i.e. only phenomena confirmed by the senses can be perceived as knowledge), interpretivism opts for a perspective of the real world based on the “distinctiveness of humans as against the natural order” (Bryman, 2008, p. 15). The division generated by this “clash” in what can and should be considered knowledge emphasizes explanation of human behavior (positivism) versus the understanding of it (interpretivism). Interpretivism, thus, is concerned with the “empathic understanding of human action rather than with the forces that are deemed to act on it” (Bryman, 2008, p. 15). People attribute meaning to events and their environment, whereas the study objects of the natural sciences do not. Therefore, social scientists are concerned with the meaning attributed to processes, events, and specific environments. As Bryman (2008, p. 588) argues, although this is not completely predetermined, an interpretivist approach to social sciences is often related to a qualitative strategy. This research aims exactly at uncovering the meaning attributed to Brazil by the new immigrant, since, as argued in Chapter 5, opting for Brazil often means opting for a more difficult migratory process.

3.2 Case Study Design

As explained in Chapter 1 and in the previous section, an increase in North-South migration has been acknowledged by many organizations that study and report on international migration. In order to gain greater insight in these migratory processes, I adopted a case study method to study Portuguese (North) migration to Brazil (South). According to Verschuren and Doorewaard (2010), in case study research “the researcher tries to gain a profound and full insight into one or several objects or processes that are confined in time and space”. Some characteristics of a case study as proposed by the authors are a small number of research units, a focus on depth rather than breadth, and strategic samples rather than random samples. Although this is questioned by Bryman (2008), Verschuren and Doorewaard (2010) also argue that qualitative methods could also be seen

as a characteristic of case studies. Since I tend to agree with the idea that a case study deserves methods and techniques intended at increasing the understanding of a phenomenon, the choice of methods in this case study has fallen on qualitative methods. It is interesting to point out, that criticisms on this particular research design seem to be widespread, even among social scientists (Flyvbjerg, 2006). According to Flyvbjerg (2006), one of the most common "misunderstandings" regarding case study research is the context-dependent knowledge they generate. In relation to this particular misunderstanding, Flyvbjerg (2006) demystifies the assumption that this knowledge is not valuable, by arguing that it is actually necessary in order to achieve expert knowledge in any field, but especially in the social sciences. According to the author, the social sciences cannot offer totally context-independent knowledge, and case studies are the best suited way to produce the kind of knowledge social sciences are, in fact, best at producing.

In sum, this research offers a case study of North-South migration in the aftermath of the 2008 global economic crisis by studying highly-skilled Portuguese migration to Brazil. In doing so, it takes the colonial, historical, and cultural linkages between both countries. Little seems to be known on the decision-making process, the expectations of the Portuguese today when they decide to move to a country where they speak the language and with which they tend to be quite familiar through the media (see also Chapter 5). This cases study aims to take precisely these linkages into account by analyzing their importance in the migratory process.

3.3 Research Methods

Two main methods were employed in this research: literature reviews and qualitative semi-structured interviews. The literature reviews were done prior, during, and after the fieldwork in which the interviews were conducted. Figure 2 illustrates the steps taken in the process of this research. In the next section there will be specific attention to the methods employed.

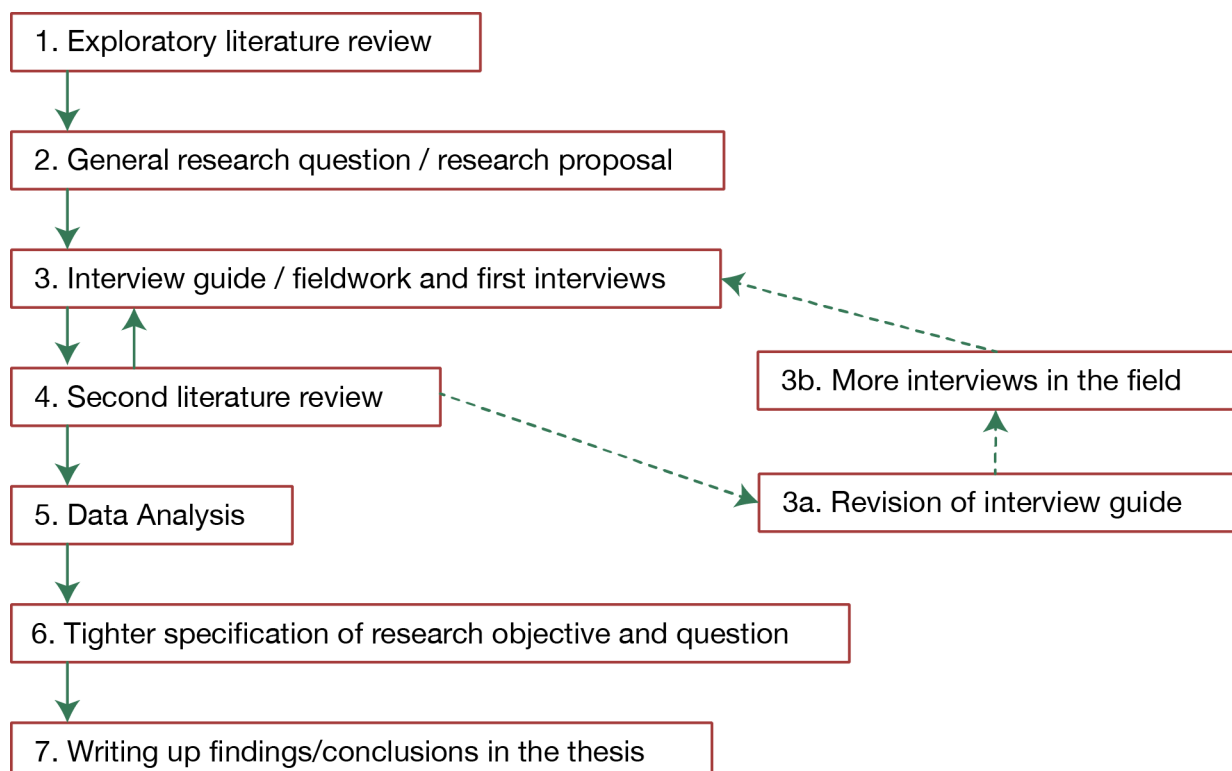


Figure 2 Steps undertaken during the research.

3.3.1 Literature Review

A first literature review took place when looking for a topic that dealt with international migration. I was particularly curious about the effects of the global economic crisis on migration. Because I had heard, mainly from my family, that a considerable number of young Portuguese were choosing emigration as a way-out of unemployment in Portugal, my attention was drawn to this particular case study quite quickly. After this first 'orienting' research on the internet, blogs, social media, and library databases, I decided my focus would be on migration from Portugal to Brazil. Although I took the time during this first phase to revise theories on international migration that had been discussed in some courses in the first semester of my master's, my focus then was on the recent narratives surrounding the economic crisis and migration patterns. Therefore, during this first orientation I looked into blogs and social media website in search of material on and information about young Portuguese emigration to Brazil.

A second literature review was done partly during the fieldwork and once I returned from the field. With the data I collected through the qualitative interviews, more research proved necessary into topics that were mentioned by my respondents, but with which I was not sufficiently acquainted. This was the case with the concept of *Lusofonia*, which will be explained in greater detail in Chapter 4, as well as with the absolute numbers on emigration to other destinations. After the first literature review and some conversations with my family, I expected the absolute numbers of Brazilian emigration to be rocket-high when I went to the field. Although my respondents confirmed that they knew many peers who emigrated between 2010 and 2013, they argued most of them remained in Europe, which raised questions as to whether the number of people migrating to Brazil was really that high. A second literature research was thus necessary to establish that, although numbers proved to be lower than expected, according to many databases, there was still a significant increase (this will be explained in greater detail in Chapter 5). Furthermore, the Portuguese relationship with its former colonies (expressed also in the concept of *Lusofonia*) and the existence of a relatively well-studied Lusophone Migration System make the case all the more interesting to study, especially from a qualitative perspective.

3.3.2 Qualitative Interviews

During my fieldwork in Rio de Janeiro I employed qualitative interviewing as a method to collect data, because, as Bryman (2008, p. 456) argues, the relatively unstructured nature of the interviews allows more space for the interviewee's point of view. The aim of qualitative interviews is to gather rich and detailed answers, with a special focus on what the interviewee views as important in relation to the research. The flexibility of this interview technique allowed me to accompany the flow of the respondent. Most of them knew more about some particular aspects that were touched upon throughout the interview guide. For instance, while some interviewees had a large number of friends abroad and could actually name many countries in which they now had friends and family, others seemed to come from less 'mobile' surroundings and have only 'acquaintances' abroad. Depending on the field of study and the personal interest of the interviewee, I was also able to ask more in-depth questions about the historical and cultural relations between Portugal and Brazil. Another interesting aspect was that those who were more in touch with Brazilians in Portugal knew much more about the personal relations between Portuguese and Brazilian people than those who based their previous

knowledge on Brazil solely on the media. Thus, although all different topics in the interview guide were touched upon during the interviews, the quality and length of the answers per topic depended strongly on the interviewee's background. The only way to truly benefit from the respondents' different background, going beyond educational level and other 'measureable' aspects, was by interviewing them qualitatively. Since the personal experiences played an important role in the migrants' relations to/with Brazil and Brazilians, allowing space for people to move back and forth while they thought about examples and recalled situations and experiences delivered rich data at the end.

The flexibility of qualitative interviewing also allowed me to change my interview guide after the first three interviews. My first interview guide was too structured, and although I was prepared not to follow it to the letter, it confused me during the interviews. Following these first interviews, I changed the guide and structured the questions to be asked much more based on the topics that needed to be addressed than on concrete questions¹³. The second interview guide followed the main recommendations by Bryman (2008, p. 442), namely to create a certain order in the topic areas, while at the same time guaranteeing flexibility; to formulate questions in order to facilitate answering the research questions, while at the same time not making it too specific; try to use a language that is easy to follow by my interviewees. Luckily, the first three interviews were still useful for analysis, since the topics addressed were not changed.

3.4 Sampling

Due to the nature of qualitative research, in which a relatively small number of cases is studied in-depth, probability sampling does not offer the best selection of respondents (Bryman, 2008). On the other side of the spectrum, non-probability forms of sampling in general seek to find participants in a strategic way in order to guarantee respondents that are relevant to the research questions (Bryman, 2008, p. 415).

During my fieldwork, I applied a combination of purposive sampling and snowball techniques in my search for respondents. I did not know young Portuguese immigrants in the city first-hand, so my first tactic was to approach my friends and acquaintances and ask whether they knew of Portuguese immigrants I could interview. The first recommendations were all related to the typical migrant associations where, as my friends believed, I could probably find many Portuguese¹⁴. Although I did not believe people my age would still be getting together through associations of the kind my friends were referring to, after some internet research my expectations were confirmed and I came to the conclusion that these associations were less numerous than my friends thought them to be. Moreover, their websites were poorly maintained and outdated, so finding respondents through associations proved to be a dead end.

Therefore, I decided to turn to the kind of 'association' my generation is more likely to use, namely social media websites¹⁵. This was the first part of the sampling, and it was strictly purposive¹⁶. I posted a message on a number of Facebook groups and pages for (Portuguese) immigrants in Brazil – namely, "Brasil, país de imigração"; "Portugueses no Rio de Janeiro"; and "CARIOTUGAS (Patricios no Rio de Janeiro)" – as well as on my own Facebook profile page. In addition to this, I

13 See also Appendix A and B for both interview guides.

14 Fonseca (2009) has written (in Portuguese) on the Portuguese associations in Rio de Janeiro around the beginning of the 20th century. It is also interesting to mention that even a taxi driver recommended me to look for these Portuguese associations in the city.

15 The role of social media in this research will be explained to greater detail in section 4.4.2.

16 See appendix C for the call I posted on social media (in Portuguese).

posted the same message on a group (“Lusofonia – Unir os Falantes de Português”) on LinkedIn, a more professionally oriented social media website. In these ‘calls’, I specified the age (under 35), educational background (at least a bachelor’s degree), and the date of emigration (after 2008) of the immigrants I was seeking to interview. As Bryman (2008, p. 415) argues, this particular way of sampling guaranteed that I sampled interviewees relevant to the case study.

The posts on my Facebook profile, the Facebook groups and the LinkedIn group resulted in a number of responses from Portuguese people and friends who could indicate someone. Although the posts on social media groups received less attention than I was expecting, through the responses and connections that I obtained in that way I was able to find other interviewees (snowball sampling). Most of the interviewees indicated they enjoyed participating and were therefore willing to indicate more people. One of my interviewees indicated a friend whom I ended up not being able to interview, because he rescheduled the interview twice and went on a trip in the last weeks of my stay in Rio. Furthermore, one person replied to my call in a Facebook group, but we were also unable to schedule the interview due to schedule changes. I ended up conducting 12 individual interviews and 1 interview with a couple who had migrated to Brazil together. Figure 3 illustrates how the respondents were found through the employed sampling techniques.

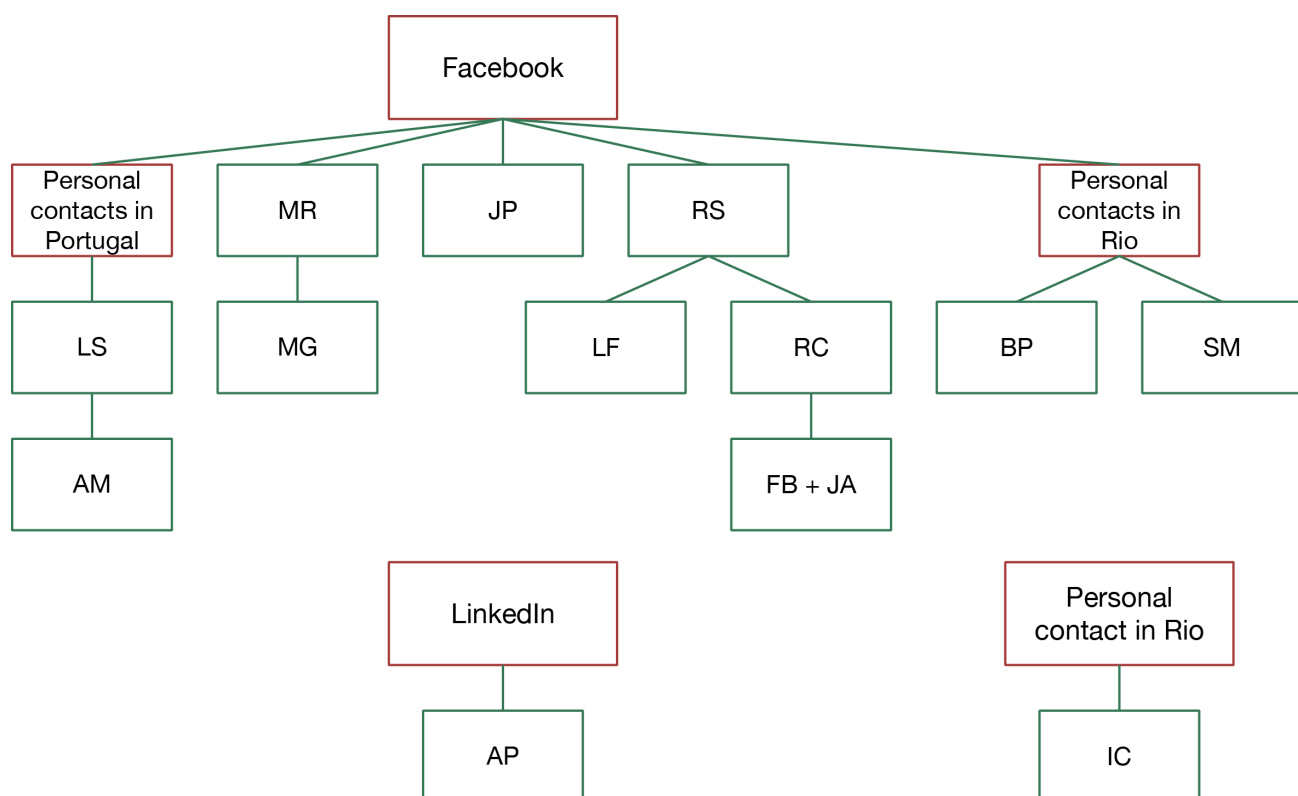


Figure 3 Sampling of respondents through social media websites

3.4.1 Conducting the Interviews

In my posts on social media I explained that the interview was likely to last anywhere around 45 minutes and that the location for the interview would be of the respondents’ choice. The average duration of the interviews was above the predicted 45 minutes, but none of my respondents seemed to mind continuing the interview whenever I mentioned that I was taking up more of their time than I had expected (and whether they needed to leave). Out of the 13 interviews conducted, 3 were

conducted at my temporary place, 3 were conducted at the respondents' houses, and 7 opted to meet in public spaces. The shortest interview lasted around 30 minutes, the two longest around 1.5 hours. With the respondents with whom I agreed to meet in public spaces, I had some time to "break the ice" over coffee or lunch before starting the interview. I noticed that for many of them, knowing a little more about my relation with Portugal and Brazil seemed to make them open up a little more about their experiences. All interviews were conducted in and transcribed to Portuguese. In the context of this study, which also deals with how immigrants perceive the world from a 'Portuguese perspective' (relation Portugal-Brazil for instance), I believe being able to relate to terms and aspects mentioned and not needing an interpreter guaranteed a more correct interpretation of the data. All the citations used in the analysis (Chapter 6) were therefore translated by the author.

I attempted to start every interview by asking whether I could use the respondents' real name in the interview. Whenever I forgot to pose the question at the beginning of the interview, I would do it at the end. None of the respondents opposed me using their real names instead of pseudonyms. However, I opted to use initials in order to guarantee some kind of anonymity, and because I did not see greater value in using full names. Moreover, all the respondents agreed to have the interview recorded, thus all the interviews were recorded and subsequently transcribed. More or less half of the transcriptions were done still in the field; the other interviews were transcribed once back in the Netherlands. Asking whether I could use the respondents' name and whether I could record the interview by explaining that the data collected would be used for the purpose of my master's thesis only, was my way of achieving informed consent. Although I explained via messages on social media or e-mails the purpose of my research, it is important to provide as much information as needed in order for the respondents to be able to make a well-informed decision on whether they want to participate and on which terms (e.g. under their own name or anonymously) (Bryman, 2008, p. 121).

3.4.2 *On The Role of Social Media in Migration Research*

Two specific aspects about the role of social media in this research are worth pointing out. First of all, although I had expected this to a certain extent, the diminished importance of migrant associations in the current globalized context of mass communication and social media was even greater than I thought. I found a number of associations on the website of the Portuguese consulate in Rio de Janeiro¹⁷, but as said above, the associations did not seem very 'lively'. When I questioned my respondents, off-record, on the existence of actual active Portuguese associations, they argued they did not know of any. All Portuguese events, such as typical dinners and nights out, they had attended were organized by the communities present on social media groups. According to them, these 'traditional' associations are thought of as suitable for "old" people, not for people their age. This illustrates the much weaker importance of the "traditional migrant association", which, as Caselli (2010) argues in relation to immigrant associations in the Italian province of Milan, have as their goal to maintain or rediscover the identity and culture of the community of origin. We could thus conclude that this bonding between new country and the community of origin now takes place in a different way, namely through the Internet, and perhaps more specifically social media.

The second aspect to point out here is the significant presence of young Portuguese immigrants in social media groups that connect them to a Portuguese community. Basing myself on Komito

17 The precise link with the list of associations: <http://www.consuladoporugalrj.org.br/portugal/comunidade-portuguesa-no-rio-de-janeiro/> (accessed October 31, 2014).

(2011), I argue that developments in information and communication technologies (ICT), the Internet, and more recently social media have had a great impact on migrant communities. This aspect was already mentioned in the previous chapter. As Komito (2011) argues, developments in ICT and Internet in the previous decades led to (i) facilitated migration processes based on social ties; and (ii) the ability for immigrants to participate in the culture and politics of culture in which they grew up in. As an immigrant myself, I can especially relate to the second point, since I also keep in touch with many cultural and even political aspects of my home country through the internet (online news sources, magazines, videos). The recent emergence of social media has impacted immigrant communities even further by offering a low-level ambient presence and monitoring, which can be seen as a “manifestation of virtual communities” (Komito, 2011). As the author argues:

If the first waves of Internet applications helped extend personal networks and building bridging capital, this second wave of social media applications is, in addition, enhancing and supporting communities by contributing to bonding capital (Komito, 2011, p. 1084).

I argue that, to a certain extent, I was able to make use of this new way of community engagement by posting on the research I was conducting, which naturally focuses on something that spoke to the members of the social media groups in a personal way, since it held relation to their own migratory process.

Although I was able to do the number of interviews I had in mind on a relatively short fieldwork, I must admit to a disadvantage in this way of sampling. In sampling through social media the researcher holds a very passive role. A lack of personal contact in the approach of possible interviewees makes the decision to participate or not in the research perhaps harder, since people have no idea with whom they are dealing. From that perspective, as one of my female respondents pointed out after the interview, I was actually lucky for being a woman otherwise I would probably have received fewer replies, especially from women. Although I ended up with enough lengthy and rich interviews, there was a point in my research where I was actually afraid I would not find the minimum number of participants I had hoped for (the bar had previously been set at 12). More posts on the same groups and eventually reaching out to contacts in Portugal proved helpful then.

However, if on the one hand this sampling technique makes the researcher dependent on the willingness and readiness of the group members on social media to participate, it is important to stress that on the other hand it also engages people who in fact may have already reflected on their migratory process, and might therefore be willing to share interesting knowledge and experiences.

3.5 Data Analysis

The first step towards the analysis of the results was the transcription of the interviews. Again, part of the interviews were transcribed while still in the field, whereas the rest was done back in the Netherlands. Although I had left to the field with the intention to apply a “transcribe-as-we-research” technique, the fact that I had relatively more interviews in the last weeks of my stay in Brazil did not make that possible. Furthermore, some of the longest interviews were done at the end, which did not allow me time to keep up with the transcriptions in the last weeks.

Once all 13 interviews had been transcribed, I started the process of analyzing them. The strategy used in the analysis can be categorized under the broader term of narrative analysis. According to

Bryman (2008, p. 553), defining narrative analysis can prove to be a difficult task. The author argues, that main aspects of this type of analysis concern at least: the connections of people's accounts of past, present, and future events; stories generated about them; and the significance of context for the unfolding of events and how people sense their role within them. According to Bryman (2008), there are a number of models of narrative analysis from which one has been selected for the analysis of the data collected, namely *thematic analysis*. In order to analyze my data, I printed out all the transcripts and analyzed them 'old style' with pen and paper by marking parts of the texts and placing codes along the margins. I decided against using any kind of research software, such as Atlas.ti, because I did not see any added value in it, but especially because of a concern for the deconstruction of the data into unintended chunks, since I believe the themes and codes used cannot be seen completely separately. The question as to whether computer software is useful in qualitative analysis seems to be a recurring one in research, as pointed out by Bryman (2008, pp. 566-567).

As argued by Bryman (2008), it is difficult to stipulate exactly what can be seen as thematic analysis, since for some researchers themes and codes are more or less the same. I must admit that while coding my data I did not bother with any kind of distinction between these two. The codes (or themes) I used in the coding were based on issues of repetition (of certain words and topics); similarities and differences, and theory-related comments. For instance, while there were several recurrent reasons as to why the immigrant had chosen Brazil, and in special Rio de Janeiro (for instance, the image of the city spread through mass media, the weather, family), there was also a code named 'migration decision'. The main difference in this case relates to the fact that the code 'migration decision' accounts for the decisive factor for some immigrants, while different other aspects may also have influences the decision. Moreover, many codes were theory-oriented, since the interview guide reflected several of the theoretical and contextual aspects used in this thesis and based on Fawcett (1989), namely mass cultural connections and the regulatory linkages. In general, as explained above, I decided not to divide the data too structurally into themes or codes in order to maintain the integrity of it.

The complete list of codes/themes can be found in the table below:

Themes/codes used in the analysis	
Economic crisis	Lusophone Migration System
Labor/work/jobs	Mass communication
Agreements	Social media
Visa	Media
Portugal/Brazil relations	Language
Migrant acceptance	Portuguese culture
Discriminations	Brazilian culture
Migration decision	Image / expectation of Brazil / emigration
Regulations/laws	

Table 4 List of codes used in the analysis

After coding the transcripts of the data, the analysis was done based on the linkages that previously selected from the theory on international migration systems (see Chapter 2), namely the Mass Culture Connections and the Regulatory Linkages between both countries. The analysis is presented in Chapter 6.

4. *The Historical Roots of Luso-Brazilian Relations*

This chapter's purpose is to sketch the historical context that unites Portugal and Brazil. In order to address a possible transformation of asymmetrical Luso-Brazilian relations in the 21st century, as the research question proposes, it is important to take the historical context of these relations into account.

In order to do so, this chapter will start with a brief outline of the history of the Portuguese Empire, followed by a focus on Colonial Brazil (4.1). Subsequently, the focus will shift to the (diplomatic) relations between Portugal and Brazil in the 20th century, when the first real attempts of strengthening the existing ties took place after Brazilian independence in the first half of the 19th century (4.2). In the final section, I will explain the idea(l) of Lusophony as something that has shaped Portuguese identity throughout the past decades, and in doing so also the perspective of the Portuguese of their former colonies (4.3).

4.1 *The Portuguese Empire: 1415 – 1999*

One could say that the Portuguese Empire has a special history even in a European context. Portugal, the first modern European nation, emerged from a mingle of many cultures – Iberians, Celts, Phoenicians, Greeks, Carthaginians, Romans, Visigoths and Moslems (Burns, 1980). In order to assert its independence, Portugal had to free itself from Moslem control and Castilian claims, and in 1139, Afonso Henrique of the House of Burgundy became the first King of Portugal. From all European countries, Portugal was the longest lasting colonial empire in the world (Engerman & Neves, 1997)¹⁸ Its accomplishments were not only remarkable for the size of the country – they were also impressive in relation to the size of its population. The beginning of the 15th century characterizes the start of the expansion of the empire¹⁹ with the first expedition to Ceuta (Morocco) in 1415. The focus in these first decades was on the Atlantic, with the colonization of the Madeira and Porto Santo islands, and the discovery of the Azores islands in 1427. The Portuguese were also the first to undertake a systematic approach during their expeditions along the coast of Africa. In 1441, the first slaves from present-day Mauritania arrived in Portugal, followed by the first commercial settlement in West Africa. In the 1450s and 1460s, the Cape Verde islands were discovered and colonized. By 1460, the Portuguese had reached present-day Liberia. After a few years of decreased interest in discoveries, Timbuktu and Mali were reached in 1480. In 1482, Congo and Angola were reached, and only six years later Bartolomeu Dias circled the tip of Africa. In 1493, Cristóvão Colombo returned from the Antilles, and Portugal and Spain divided the world in the Treaty of Tordesillas (1494). Between 1495 and 1500, the Portuguese discovered Greenland and Newfoundland. The coast of Canada was actually named after the Portuguese explorer João Fernandes Lavrador. The map below illustrates the routes explored by the Portuguese (and the Spaniards)²⁰.

¹⁸ Unless otherwise specifically stated, this chapter (4.1) is mostly based on the article by Engerman and Neves (1997): "The Bricks of an Empire 1415-1999: 585 years of Portuguese emigration".

¹⁹ According to Engerman and Neves (1997), there are records of a Portuguese shipwreck in the North Sea already back in 1194.

²⁰ Retrieved from <http://greatreview.wikispaces.com/Chapter+14>

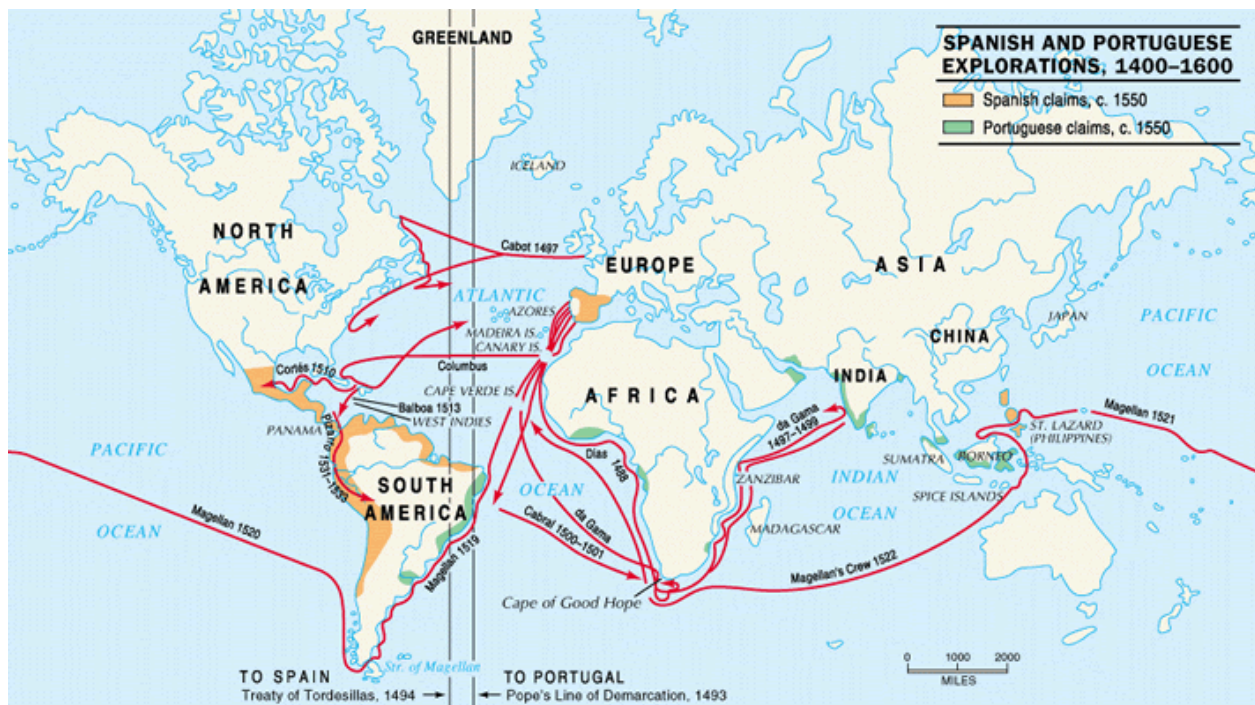


Figure 4 Map of the Spanish and Portuguese explorations in the 15th and 16th century

The first “Golden Era” of the Portuguese Empire took place between 1500 and 1580. During these eight decades, the Portuguese discovered both the way to India and Brazil. In the decades that followed, however, the focus remained strongly on the trade with the East²¹ (Engerman & Neves, 1997). Portugal became the link between Europe and the East by providing European goods such as textiles, clocks, lenses, and metals, in exchange for Indian products such as spices, silks, and other exotic products from the region. Goa (India) was conquered in 1510, Malacca (in present-day Malaysia) in 1511, and Ormuz (Persia) in 1515. These keypoints ensured control of the trading routes in the Indian Ocean (Boxer, 1969). Soon other fortified coastal settlements were added to this list: from Sofala in South-East Africa to Ternate in the Moluccas archipelago. During this process, Portuguese missionaries became increasingly important in converting Hindus, Buddhists, and Muslims, who were perceived as “the works of the Devil”, to Catholicism (Boxer, 1969). These missionaries became one of the driving forces of the Empire, which, incredible as it may sound, possessed less than 300 ships at its height (Engerman & Neves, 1997). Despite such a small fleet, the attempts to control an enormous Empire that stretched from Lisbon to Malacca were of considerable size for such a small country on the geographical verge of the Old World.

In 1580, Portugal started experiencing what turned out to be a 80 year long setback. It was conquered by Spain in 1580, and it regained its independence only 60 years later, in 1640. During roughly the same timeframe, the Dutch were fighting their War of Independence from Spain, also known as the Eighty Years’ War (1568-1648). Since Portugal’s ‘possessions’ were spread around the globe, the most severe Dutch attacks were aimed at the Empire’s colonies, both the Portuguese and the Spanish (Boxer, 1969). Struggles and battles were held across the globe, “on four continents and seven seas”, making of it the real First World War, according to Boxer (1969):

Apart from Flanders fields and the North Sea, battle was joined in such remote regions as the estuary of the Amazon, the hinterland of Angola, the island of Timor and the coast of Chile. The prizes

²¹ The Portuguese included the East African coast in the term Asia. The name State of India (*Estado da Índia*), described the Portuguese conquests between Cape of Good Hope and the Persian Gulf on one side of Asia, and Japan and Timor on the other (Boxer, 1969, pp. 39-40).

included the cloves and nutmegs of the Moluccas; the cinnamon of Ceylon; the pepper of Malabar; the silver from Mexico, Peru and Japan; gold from Guinea and Monomotapa; the sugar of Brazil and the Negro slaves of West Africa (Boxer, 1969, p. 106)

At that time, the Dutch had more resources as well as more and better trained manpower (Boxer, 1969; Engerman & Neves, 1997). They were also better fed than the Portuguese; as a Portuguese soldier in Ceylon complained, “we are so thin and hungry that three of us are not equal to one Hollander” (cited in Boxer, 1969). Furthermore, the Portuguese were also being forced by Spain to fight in Europe. However, despite these clear advantages it is important to notice that the Dutch did not conquer more than part of Portuguese Asia. According to Engerman and Neves (1997), the main reason why the Portuguese were successful in Brazil and the battles in Western Africa resulted in a draw, were the cultural and personal roots of the Portuguese in the colonized regions (Engerman & Neves, 1997). Many of the Luso-Brazilian forces, for instance, consisted of Mulattos, Negroes and other ‘half-bloods’. The successful triumvirate of leaders in Brazil consisted of João Fernandes Vieira (Madeira-born), André Vidal de Negreiros (Brazilian-born), and Francisco Barreto (Peru-born) (Boxer, 1969). The Portuguese leaders and soldiers in Brazil were also better used to the tropical climate of the country. Moreover, the Dutch were clearly superior in battles at sea, but obviously inferior while fighting on land. However, regardless of the different reasons presented above for the success of the Portuguese in Brazil, the main motive is assumed to be the deep roots of the Portuguese in their former colonies. As the Governor-General at Batavia, Antonio van Diemen, wrote to his superiors in Amsterdam in 1642:

Most of the Portuguese in India [=Asia] look upon this region as their fatherland. They think no more about Portugal. They drive little or no trade thither, but content themselves with the interport trade of Asia, just as if they were natives thereof and had no other country (Boxer, 1969, p. 120).

After its independence from Spain in 1640, independent Portugal was left with a reduced Eastern Empire with a few trading posts in India, Macau and Timor. This development shifted the Portuguese interest from its Asian possessions to Brazil, which led to a second “Golden Age” based on the West of the Empire. This period will be explained in the next subsection (4.1.1) on colonial Brazil.

4.1.1 Colonial Brazil: 1500 – 1822

As mentioned above, Brazil only started receiving proper attention from Portugal after the loss of a considerable size of its Empire in the East. Despite the rather mild interest of the colonial motherland in the beginning, trade and exploration followed the “discovery”, and within the first decade at least the coast had been explored (Burns, 1980, p. 29). After the second half of the 16th century, sugar became increasingly important as a source of wealth in the former colony (Engerman & Neves, 1997). By 1690, gold was discovered in the new land, leading to the second ‘Golden Age’ of the Portuguese Empire. Both successful periods for Portugal have one particular difference. In comparison to the first Golden Age, the second period was characterized by greater competition from and conflicts with other European countries (Engerman & Neves, 1997). Unlike the situation at the turn of 15th and 16th century, the second half of the 17th century saw the political and economic rise of other European countries, which undermined Portuguese supremacy in many ways already partly explained in the previous section. Structurally, Brazil differed strongly from Asia in that the local

population was not large enough to compete with the Portuguese newcomers, which allowed for the creation of a colonial society (Engerman & Neves, 1997). This subsection offers a brief overview of colonial Brazil as Portugal's second 'Golden Age'.

Overall, it can be said that the Portuguese were relatively slow in consolidating their sovereignty over Brazil (Bieber, 2001; Boxer, 1969). When the first trading posts were founded Brazilwood was the first resource to be exploited at high profit rates. The Crown leased out contracts to Lisbon-based merchants who received the right to trade in Brazilwood in exchange for a share of the profits and the promise to map the coastline of the new land. The lucrative business in brazilwood trade attracted attention from other European nations, such as France, during the era of European expansion. Portugal needed a strategy to secure its colony and, after attempting and failing both diplomatic strategies with France and coastal patrol. The decision that it was time to colonize the new land was then made (Burns, 1980). The donatory system established in 1532 was the first attempt by the Portuguese to consolidate their occupation (Bieber, 2001, p. 11). Brazil was divided in twelve grants from the coast until the by then yet unexplored interior. These grants were given to bureaucrats and successful military leaders, who received enormous pieces of land as well as the right to appoint minor officials, establish towns, supervise municipal elections, and distribute land and licenses for capital improvements (Bieber, 2001).

By 1580, Portugal had been able to secure the colony quite strongly – the French had been expelled from the base they had established in Rio de Janeiro, and only kept a small base in São Luís in the North of the country until early seventeenth century (Bieber, 2001, p. 16). However, effective occupation of the colony had still not taken place. Settlements could be found almost strictly along the coast and apart from the *bandeirantes*²², there were few people of European descent. Moreover, by 1650 the colony had only six cities and thirty-one small villages (*ibid.*). It is also around this time that the attention of the Crown shifted from the northeast to the center-south of the colony.

The seventeenth century was, for reasons previously mentioned, politically unstable in Portugal. This made it difficult for the colonial metropolis to maintain control over Brazil and led to a loss of influence in Asia. In their attack of the Portuguese 'possessions', the Dutch invaded Bahia in 1624, and, by 1630, they had occupied Pernambuco, where they stayed until 1653, when Luso-Brazilians expelled them from Recife (Bieber, 2001; Burns, 1980). For the first time 'Brazilians' felt proud because they had been able to get rid of the Dutch without too much interference from Lisbon. Brazilian-born leaders had a crucial share in this victory (Boxer, 1969; Burns, 1980).

During this period, low-level warfare brought the sugar industry in disorder, while the unrest made it easier for slaves to attempt fleeing (Bieber, 2001). *Quilombo dos Palmares*, for example, a large and still well-known community of runaway slaves, has its roots in the period of the Dutch occupation. During the 17th and 18th century, Portugal reinforced its grip on the Northern region of Brazil and towards the South, pushing from Rio de Janeiro downwards, eventually founding Colônia do Sacramento, present-day Montevideo in Uruguay (Bieber, 2001, p. 18). When the *bandeirantes* located mineral resources in the interior of Brazil – first gold at the end of the seventeenth century, then diamonds by the beginning of the eighteenth century – the attention shifted from the capital and the slaves from the Northeast to what came to be known as the state of Minas Gerais (Bieber, 2001). Marquis of Pombal, responsible for a large reorganization of foreign trade and foreign relations from

²² Bandeirantes were descendants of first or second generation Portuguese. According to Bieber (2001, p. 14), they were mestiços of Portuguese and Indian descent, who led slave expeditions to the interior of the country.

1750 to 1777, was able to reformulate colonial trade in a few decades (Bieber, 2001). However, the positive trade balance with its European trade partners had come at cost for Portugal of becoming fairly dependent upon Brazil. As Bieber (2001) points out:

By 1800, Brazil accounted for roughly 80% of the value of goods imported by Portugal. It consumed 80% of all products exported to Portugal's colonies. Moreover, of the exports sold in other colonies, over 60% came from Brazil. This development is striking when we consider that in 1600, just two hundred years earlier, revenues from Brazil made up only 2.5% of crown income (2001, p. 22).

The nineteenth century did not begin with a particular interest in political independence in Brazil (Bieber, 2001, p. 24). As Bieber (2001) argues, those with power in the colony were more interested in reforming the old system than in installing a completely new one. Their hope was for greater political participation in colonial administration and for the opening of Brazil to free trade. These hopes were met with the arrival of the Crown, led by King João VI in 1807, who was fleeing from Lisbon to Rio de Janeiro faced by the threat of Napoleon's troops. This brought the center of the Portuguese kingdom – “the metropolitan seat of government” – to the colony, increasing the political importance of the Brazil (Bieber, 2001, p. 24).

Once settled in Brazil, João VI opened the doors for free trade and immigrants: European scientists and scholars arrived in Brazil and wrote narratives about their adventures; the first Banco do Brasil was opened, and the first universities and military academies were established (Bieber, 2001, p. 25). By 1815 Brazil's status had been changed, and it was now a dual kingdom with Portugal. However, already in 1820, a Liberal Revolution in Portugal called for the return of João VI (Bieber, 2001). The parliament wanted to rebuild Portugal after British and French occupation by tightening control over Brazil and reasserting the colonial pact. Although a Brazilian delegation was invited to participate in the deliberations, the parliament had already drafted most of the policies that were to be applied in Brazil by the time the representatives arrived in Lisbon (Bieber, 2001). Prince regent Dom Pedro I refused to return to Portugal and barred the Portuguese troops. As Bieber (2001) summarizes the end of the colonial period in Brazil:

*The intransigence of the Cortes, however, proved decisive. Attempts to reassert the colonial pact, the refusal to grant Brazil its own parliament, the dismantling of Rio government, and sending troops to enforce these new policies, met with considerable resistance. On 7 September 1822, on the plains of Ipiranga, São Paulo, Pedro I declared “**Independence or Death,**” marking the beginnings of the Brazilian nation (2001, p. 26).*

Two features of colonial Brazil are important to emphasize as they left deep grooves in today's Brazilian society. First, as Burns (1980, pp. 94-95) points out, the way in which the economy was controlled by the Portuguese fostered a considerable internal social inequity, since there was very little room for upward social mobility in the plantation economy. A lucky few possessed large chunks of land in the country, while most people had very little. In such a society, the social, economic, and political differences between plantation owners and slaves as well as between patriarchs and laborers were too large to be overcome during one's lifetime. To a great extent, what we see in today's unequal Brazilian society is a repercussion of it. Secondly, the dependency of Brazilian economy

on Portugal meant that policies invented in Lisbon were externally imposed, and decisions were taken with little situational knowledge and updated information. This impeded Brazilian economy to develop by itself during the colonial period and nurtured further dependency.

After Brazil's independence, the Portuguese Empire started to slowly disintegrate. The period between 1822 and 1961 was characterized by an even greater loss of power and control from Portugal over its colonies. The Empire that once reached from South East Asia to Latin America was now reduced to relatively small spots on the map, with Angola, Moçambique, Goa, Macau and Timor as its main points (Engerman & Neves, 1997). Although the Portuguese Empire did not experience a third Golden Age after Brazil's independence, it was only from 1961 to 1999 that the Empire really started falling apart. In 1961, Indian forces invaded Daman and Diu, and Goa. The liberation wars in Angola (1961), Mozambique (1963), and Guiné-Bissau (1964) started almost simultaneously. Under Salazar, whose dictatorship lasted from 1928 to 1968, Portugal tried in vain to create a 'Portuguese economic space'. After the Carnation Revolution of 1974, the last colonies in Africa became independent: Guiné-Bissau in 1974, Mozambique, Angola, Cabo Verde, and São Tomé e Príncipe in 1975. Only two colonies were kept, under very specific circumstances, after 1975: East Timor was invaded by Indonesia shortly before it achieved independence, and its situation remained undecided until the turn of the millennium, when Indonesia gave up control over the territory. Macau was handed over to China in 1999, as was specified in a treaty, signifying the real end of the Portuguese Empire.

4.2 Lusio-Brazilian Relations in the Twentieth Century

This section will deal with the relations between Portugal and Brazil in the 20th century. This specific timeframe is important, since it was around the beginning of last century that the first attempts were made to tighten relations, as will hopefully become clear from the next section. After a brief overview, where some interesting points in history will be stressed as well as agreements and treaties that have been signed in the past 100 years, the idea(l) of *Lusofonia* will be discussed. Lusofonia, I argue, fulfills an essential role in the identity formation of the Portuguese and in their perception of and way of dealing with former colonies. However, before going any deeper into the relations of both Lusophone countries after independence, I find it crucial to make some preliminary remarks based on the nature of the available literature on the topic.

4.2.1 Some Preliminary Remarks

It is a fact that Portugal and Brazil have historical strong ties. This was illustrated above in an extremely short version of colonial history. Before going any further into an account of how policies have been shaped and influenced by the political and economic relations maintained between both countries since the 1910s, it is important to point out the differences found in the historical literature.

In the existing scholarly literature on Luso-Brazilian relations, these ties seem to be perceived quite differently by Brazilian and Portuguese authors. The volume *As Relações Portugal-Brasil no Século XX* (Sousa et al., 2010), edited by three Portuguese scholars, but including almost solely Brazilian contributions, illustrates how most Brazilian researchers relate to the Portuguese-Brazilian relations in the twentieth century on the one hand, and how the few Portuguese authors approach these same relations on the other. Overall, Brazilians tend to address the common history from what I would call a 'defensive' approach. The overall perspective voiced by Brazilian scholars when

addressing the historical (diplomatic) relations between both countries focuses on a ‘desperate need’ expressed by Portugal to hold on to its colonial influence, presenting the “Lusophone imaginary” represented in the founding of the Community of Portuguese Speaking Countries (CPLP in its Portuguese abbreviation, on which more in the following section) as a representation of Portuguese nationalism (Freixo, 2010). In the same volume, however, two Portuguese scholars, Santos and Amorim (2010), emphasize what they see as considerably larger efforts by Portugal throughout the twentieth century to strengthen diplomatic relations with Brazil, with the intention of arranging beneficial situations for both countries(’s nationals). According to the authors, this strategy achieved the best results during the years Portugal and Brazil were simultaneously under military regimes. I believe this different perspective and representation of the historical events that happened between both countries after independence, is something that deserves more attention. It should also not be neglected or forgotten whenever dealing with the historical relations between both countries, since articles tend to be relatively biased depending on the authors’ nationalities. In sum, we could conclude that in the case of Luso-Brazilian relations, the authors’ nationality plays a role in the perspective that is adopted of the common history between both countries. Unfortunately, however, my room to divagate into these differing perspectives of history is limited, and in the following I will be focusing mainly on more general diplomatic relations between the two countries.

In an attempt to both summarize the previous sections and introduce the next one, which deals mainly with different strategies of rapprochement, most of which were initiated by Portugal, the table below shows the political developments in the history of both countries before and after Brazilian independence.

Historical Relations Portugal-Brazil	
Colonial Brazil: 1500-1815	
United Kingdom of Portugal, Brazil and the Algarves: 1815-1822	
April 22, 1882: Brazilian Independence	
Brazil	Portugal
Empire: 1822-1889	Constitutional Monarchy: 1820-1910
First Republic, commonly known as Old Republic (República Velha): 1889-1930	First Republic: 1910-1926
Vargas Era: 1930-1945	Military Dictatorship: 1926-1928
República Nova: 1946-1964	National Dictatorship (Ditadura Nacional): 1928-1933
Military Regime (dictatorship): 1964-1985	Estado Novo/Second Republic: 1933-1974
New Republic: 1985-now	Democracy: 1974-now

Table 5 Political development in Portugal and Brazil before and after Brazilian independence

4.2.2 Diplomatic Relations

The twentieth century history of both Portugal and Brazil knew its fair number of unstable political events, such as revolutions, military dictatorships, and fascist governments, which should be placed in the unstable global political context of World War I and II, the Cold War, and even the beginning of the globalization processes, such as the new global economy and the Internet. The turn of the 20th century was characterized by a process of distancing between Portugal and Brazil (Santos &

Amorim, 2010). According to Santos and Amorim (2010), throughout the 19th and the beginning of the 20th century, occasional reciprocal visits by the countries' heads of state took place, although this should be perceived merely as a "rhetorical bilateral dialogue with practically null achievability" (Santos & Amorim, 2010, pp. 122, translation by the author). Brazil became a republic in 1889, which strongly influenced the Portuguese republicans (Santos & Amorim, 2010). The recognition of the new Portuguese republic, established in 1910, by European nations was particularly difficult in a period when most of these nations were themselves still monarchies. Brazil recognized the First Portuguese Republic, as it is mostly known, fairly quickly. However, the years that followed did not show any strengthening of the relations – partly due to World War I, the Great Depression, and the ascension of Salazar to power in the 1920s. Despite some prominent defenders of "Luso-Brazilianness and the reinforcement of the Luso-Brazilian community", who really pledged for the creation of a community of Luso-Brazilians, some failed attempts at the cultural and economic level were the only steps taken to strengthen the relations (Santos & Amorim, 2010, pp. 125, translation by the author). They would be supported by public figures such as Gilberto Freyre, which, I argue, had an important role in the development and spread of the Lusophone ideal as can be read in section 4.3.

After the unstable years of the First Portuguese Republic, which lasted until 1926, when a military dictatorship started, the relations between both countries were based more on papers, documents, and principles than on practices (Santos & Amorim, 2010). In the beginning of the 1930s, similar authoritarian ideologies and international postures were in effect in Portugal and Brazil (Santos & Amorim, 2010; Schiavon, 2010). Portugal was under rule of Oliveira Salazar between 1932 and 1974 during the Estado Novo (New State), while Getúlio Vargas was in power from 1930 to 1945, a period also known as Estado Novo in Brazil. Under his rule, Vargas limited immigration and implemented restrictive policies that were detrimental to the foreign-born population (Geraldo, 2009). However, Vargas is also said to have admired the Portuguese and it was during his government that the relations between Portugal and Brazil warmed up again. Nevertheless, the governments of both countries did not succeed in sustaining these relations for a number of reasons (Santos & Amorim, 2010). Brazil, for instance, was more focused on Pan-American ideals, while Portugal turned inwards to the own country and the remains of its 'ultramarine empire' in Africa. As some authors argue, after having become an empire focused on itself and on Brazil for two centuries, Portugal shifted its focus to the remaining African colonies once Brazil became independent (Feldman-Bianco, 2010a; Gonçalves, 2010).

The first decade after World War II was troublesome in Portugal (Gonçalves, 2010). The country had difficulty fitting in the model spread by the United States that focused on propagating free international trade. Moreover, the first documents that provided the basis for the foundation of the United Nations already obliged all participant countries to work against colonial domination, something Portugal was clearly not prepared to do in relation to its African colonies. In response to that, Portugal maintained an isolationist course, and, in 1951, altered its Colonial Act, replacing the term "colony" with "Ultramarine Provinces" (Gonçalves, 2010). According to Gonçalves (2010), the next strategies applied by Portugal to tighten control over its remaining empire were focused on the deregulation of Angolan economy in order to make it more attractive for national investors. In relation to Brazil, Portugal sought to improve diplomatic relations with this former colony. The period that ranges roughly from 1945 to 1960 knew the best diplomatic relations between the countries after Brazilian independence (Gonçalves, 2010; Santos, 2011). According to the author, the Luso-Brazilian

relations were pushed to the foreground for a number of reasons, of which the most important are the considerable presence of Portuguese immigrants in Brazil at that time; the peripheral position of Brazil in the international free trade economy propagated by the United States; and the Portuguese strategy in force to retain its remaining Ultramarine Empire. In the framework of this strategy, strengthening the ties with Brazil was perceived as an important step, because the country, as a former Portuguese colony, had considerable regional power, and was one of the founding nations of the United Nations. For this reason, although perhaps not completely integrated in the free trade economy, it still held a strong position in the geopolitical context of the Southern Atlantic (Gonçalves, 2010, pp. 101-102).

The Portuguese government implemented three specific measures in its attempt to move closer to Brazil and gain its support in maintaining the Ultramarine Provinces (Gonçalves, 2010). At the intellectual/academic level, the first one was sending the Brazilian anthropologist Gilberto Freyre, who propagated the idea of Lusotropicalism²³, on a trip to the Ultramarine Provinces. The second one, at the diplomatic level, was renovating the negotiations to sign a Treaty of Friendship and Consultation²⁴ as well as to form a Luso-Brazilian Community. The first negotiations started in 1943, in which the Brazilian ambassador in Lisbon proposed the creation of 'Statute for the Portuguese in Brazil', in response to the demands of Portuguese immigrants to be treated differently than other immigrants after immigration restrictions²⁵ were implemented in the Constitution of 1934 (Gonçalves, 2010, p. 108). A resolution passed in 1939 by the Council of Immigration and Colonization had already annulled the restrictions on the number of Portuguese immigrants entering the country, but restrictions in regard to professional activities were still in law. Despite the pressure of the Portuguese community in Brazil, the proposed Statute was not signed, mainly because Salazar wanted the agreement to be bilateral in order to be able to take matters into his own hand in case needed. Brazil did not agree and negotiations were once again put on hold for a few years. The third and final measure was of political nature and consisted mainly of mobilizing 'friends of Portugal' in the Brazilian Congress and in the Ministry of Foreign Relations to support this Portuguese political strategy. This mobilization was done mostly by the Portuguese Embassy in Rio de Janeiro. According to Gonçalves (2010), these three measures outlined above were quite successful mainly because the way in which the Brazilian political elites perceived the insertion of Brazil in the changing international system favored the maintenance of Luso-Brazilian relations.

Without wishing to go too deep into a political analysis of the authoritarian regimes in force in 20th century Portugal and Brazil, it is interesting and relevant to point out that, during the period that the Luso-Brazilian relations grew stronger – between the end of World War II and the first half of the 1960s – both countries were under comparable (authoritarian) regimes. Getúlio Vargas was the 14th president of Brazil during a fifteen yearlong dictatorship from 1930 to 1945 and once again years later, between 1946 and 1951, when he was democratically elected (Gonçalves, 2010). Oliveira Salazar, on the other hand, was the chief of state in Portugal for more than 35 consecutive years. In the beginning of the Estado Novo in Portugal (1933), emigration was perceived as a process that had negative effects for the Portuguese economy, since labor force was supposedly lost to other countries (Gonçalves, 2010, p. 118). In this perspective, Salazar – in power from 1932 to 1968, a

²³ Very bluntly put, Lusotropicalism is the idea according to which the Portuguese were mainly responsible for creating the diverse country Brazil has become (Gonçalves, 2010; Santos & Amorim, 2010). More on this idea can be read in section 4.3.

²⁴ In Portuguese: Tratado de Amizade e Consulta.

²⁵ See also section 5.1.

great part of the Estado Novo regime – saw emigrants as traitors of the Portuguese nation. Following this line of thought, the government did not involve itself with the migratory process until migrants started being robbed and lured to worse situations in Brazil than the ones they were trying to escape in Portugal (Gonçalves, 2010). In 1947, the Ministry of Internal Affairs created the *Junta de Emigração*, mainly to encourage and facilitate (and profit from) the remittances emigrants sent home (Gonçalves, 2010). With such encouraging measures in place, in the 1950s approximately 243.000 Portuguese emigrants left for Brazil. These developments in Portuguese policy coincided with the negotiations on the Treaty of Friendship and Council during Vargas' second term. Vargas' reaccession to power in the post-World War II years was seen in Portugal as something positive, since the Brazilian president was perceived as a friend of the country (Gonçalves, 2010).

The negotiations on the Treaty were taken up again in 1951, under the leadership of João Neves da Fontoura as Minister of External Relations, who recognized the value closer proximity to Europe would have to Brazil internationally and economically. Two other underlying motives are pointed out by Gonçalves (2010, pp. 108-109) to reopen the negotiations about a Statute for the Portuguese: the fact that, in the midst of the Cold War, Vargas believed it safer to support Portugal keeping its Ultramarine Provinces than dealing with any other consequences that would arise from independence; and the fact that the lectures and talks given by Gilberto Freyre on his travels to the Portuguese Ultramarine Provinces attracted the attention of politicians and intellectuals and increased at the same time their sympathy for the cause. The question regarding to whom the treaty in progress would apply was settled by agreeing on a bilateral agreement applicable merely to Portuguese immigrants in Brazil and Brazilian immigrants in Portugal. If on the one hand, the Portuguese did not feel inclined to opening up the markets of Angola to Brazilian coffee investors, on the other hand, Brazil was not inclined to dealing with migration from the African colonies to the country (Gonçalves, 2010). In November 1953, the Treaty of Friendship and Consultation strengthening the existing Luso-Brazilian ties was finally signed (Gonçalves, 2010). According to Gonçalves (2010), the Treaty was especially favorable to Portugal, since it offered support for its international politics and its colonial policies. For Portugal, losing its remaining colonies would mean inconceivably diminished international power.

Although the Treaty of Friendship and Consultation (1953) was not the first agreement between both countries it should be perceived as an achievement seldom seen before²⁶. On the relation between Portugal and Brazil, Minister Fontoura wrote in an article:

[P]olitics with Portugal cannot be seen as politics. It's a family affair. No one does politics with parents or brothers. You live with them, in the intimacy of blood and feelings. In difficult times, we seek support and advice in each other. Without rules, without treaties, without compensations – through the power of blood (Fontoura, 1957 cited in Santos, 2010, p. 65, translation by the author).

In a letter to President Vargas in 1943, Fontoura, then ambassador of Brazil in Lisbon, argued that granting the Portuguese diaspora in Brazil the quality of "quasi-nationals" would not only be convenient, but would also have unimaginable repercussions in Portugal and to (the sense of) "*latinidade*" in general (Santos, 2011, p. 66).

²⁶ Santos (2011, p. 64) mentions a couple of other important treaties and documents, such as the Treaty of Friendship and Alliance (1825), which recognized Brazil's independence, the public advocacy for a Luso-Brazilian Confederation (1917), and the work of Gilberto Freyre, on which more will follow in the next chapter. There were also previous agreements on cultural and economic grounds, before the more overarching Treaty was signed in 1953. For this thesis, however, it feels more important to focus on the treaties and agreements that might have been of influence for the migration flow in question.

It cannot be neglected that the Portuguese diaspora in Brazil in the 1950s was of great importance in achieving first the negotiations and later the ratification of the Treaty that would grant the Portuguese a noticeably advantageous position in comparison to all other migrant groups in Brazil, (Santos, 2011). In the context of the Cold War, and under pressure to decolonize, Portugal relied on its diaspora in Brazil to pressure the creation of greater and stronger ties with its former Latin American colony. The press²⁷ was crucial in the process of promoting the adhesion of the diaspora to the ideals and plans of Salazar's government (Schiavon, 2010). The diaspora, strongly influenced by Luso-Brazilian newspapers and the information that Portugal spread through existing media, fought for an improved situation of immigrants in the former colony by supporting stronger diplomatic relations between Brazil and Portugal (Santos, 2011). This was, as argued above, exactly what the government of Salazar needed during a period when the international community was pressuring decolonization.

4.2.3 *Treaties, Agreements, Exceptions: the Portuguese in Brazil from the 50s onwards*

From the 1950s onwards, several agreements and treaties have been signed between Portugal and Brazil. At different levels and in different fields, these agreements tend to either make exceptions in favor of both countries' nationals or to facilitate cooperation. Because the focus of this research is on migration – and in broader sense also the perception of those who currently migrate within the Luso-Brazilian space – the following treaties are worth mentioning:

- 1953: Treaty of Friendship and Consultation;
- 1972: Decree N° 70.391 which enacted the 1971 Convention on the Equality of Rights and Duties between Portuguese and Brazilians. This decree is better known as the *Estatuto de Igualdade* (Equality Statute);
- 2000: the more encompassing Treaty of Friendship, Cooperation and Consultation, which revoked the 1953 Treaty and a number of other agreements on cooperation between both countries.

First of all, since the focus of the present thesis is on the migratory flows from Portugal to Brazil, it is important to stress the status assigned to the Portuguese residents in Brazil through the Treaty of Friendship and Consultation signed in 1953, as one of the oldest relevant legal documents that specifies the “very special” Luso-Brazilian relationship (Selcher, 1976). According to the Treaty of 1953, both parties would allow free entry and exit as well as the establishment of residence, and the free transit in Portugal or in Brazil, to the other party's nationals, provided the rules established by both countries in regard to national security and public health were taken into account. As pointed out by Oliveira (2013), the 1953 Treaty of Friendship and Consultation celebrated the Principle of Reciprocity between both nations.

The Equality Statute (1971) reinforced this reciprocity by guaranteeing equal rights and duties to Portuguese in Brazil and Brazilians in Portuguese who had requested to be ‘treated as equal’ under this statute. This is not, and never has been an automatic process, and a request should be put up by the immigrant with at least five years of permanent residency in the other country. This statute, which is still in place today, goes as far as to grant political rights to Portuguese in Brazil and

²⁷ According to Schiavon (2010), one of the newspapers that was published and spread in Brazil, and that was strongly ‘salazarist’, was A Voz de Portugal.

Brazilians in Portugal without having to be naturalized, thus while maintaining the person's nationality of origin. Although I believe the Equality Statute is not an agreement that can be found in many countries, which makes it 'legally special' and distinctive for the Luso-Brazilian relationship, it does not regulate a (facilitated) establishment of residency in both countries by each other's nationals. In view of this thesis' focus, it is important to stress mainly the legal aspects that govern the circulation and establishment of Portuguese and Brazilian nationals in the other parties' territory.

The free circulation *an sich* of the Portuguese in Brazil and vice-versa, which was already guaranteed in the 1953 Treaty, was reinforced in Law N° 6.815 from 1980, commonly known as the Foreigners' Statute (*Estatuto do Estrangeiro*), which regulates the legal position of all foreigners in Brazil. Besides the exceptions made to the Portuguese in the statute in relation to, for instance, the professional field in which they were allowed to work²⁸, the Portuguese nationals were also the only foreigners allowed to transform a temporary or tourist visa in a permanent visa according to the sole paragraph of Article 69 of the Statute. This privilege, however, was revoked in 1993 with Decree N° 740. The main reason for this 'setback' in the reciprocal relations between Portugal and Brazil were diplomatic 'misunderstandings' after the Portuguese accession to the European Union in 1986 (Barbosa, 2008). Due to the subsequent large waves of immigrants the country experienced, which will be better set out in Chapter 5, Portugal tightened the control on immigration, and on several occasions Brazilians were not allowed to enter Portugal on the allegation that they were planning on establishing residency in the European country (Oliveira, 2013). Around this same period, Barbosa (2008) points out the difficulties of Brazilian dentists to establish themselves in Portugal and exercise their profession, despite agreements on the recognition of diploma's, did not serve to facilitate diplomacy. These immigration policy changes as a consequence of the Portuguese accession to the European Union are also shortly mentioned by Jerónimo and Vink (2011). This throwback in the reciprocity principle between Portugal and Brazil was carried out by the latter in Decree No 740 in February of 1993. In an interpretation of this decree, Oliveira (2013) argues:

The benefit that exempted the Portuguese from the requirements of special character foreseen in the norms of selection of immigrants and the minimum period of residency for the concession of a permanent residency visa were revoked. In this way, the concession of such a visa was, in practice, indirectly hampered without disregarding the merit of the Equality Statue (Oliveira, 2013, translation by the author).

In sum, although the Equality Statute between both countries was maintained and is still in place today, guaranteeing Portuguese immigrants in Brazil (and Brazilian immigrants in Portugal) special rights and duties very similar to those of regular nationals in case they file an application to be 'considered equal', the Statute in itself does not facilitate the process of immigration. Immigration in Brazil was facilitated for the Portuguese in the 1953 Treaty of Friendship and Consultation, and later in Law No 6.815 (the Foreigner's Statute). The former guaranteed free circulation and the establishment of residency for the Portuguese in Brazil and Brazilians in Portugal, while the latter allowed in one sole paragraph in article 69 the transformation of a temporary and tourist visa into a permanent residence permit.

However, the 1953 Treaty of Friendship was replaced by the 2000 Treaty of Friendship,

²⁸ According to the *Estatuto do Estrangeiro*, foreigners are not allowed to be engaged in professions that can be considered of risk to the national security. This reflects the fear of communism during the military dictatorship in Brazil (see also Chapter 5).

Consultation, and Cooperation, which still highlights the equality between Brazilians and Portuguese, although the principle of free circulation of people is tightened even further, now allowing solely a stay of up to 90 days (renewable for another 90 days) without a visa for Portuguese in Brazil and vice-versa (Barbosa, 2008). Paragraph 69 of Law No 6.815 was revoked in 1993 by Decree No 740 after several diplomatic incidents. One could thus say that (permanent) Portuguese immigration in Brazil or Brazilian immigration in Portugal is not in any way facilitated by the law, despite agreements that guarantee a different treatment for the Portuguese in Brazil and the Brazilians in Portugal. The special and reciprocal character of the relationship was maintained, but mainly due to the accession of Portugal to the European Union, the diplomatic achievements of the 1950s and following decades suffered considerable setbacks in relation to circulation and immigration of Portuguese and Brazilians in each other's territory.

4.3 Lusofonia

As was already pointed out in the first section of this chapter, Portugal was the first and longest lasting European colonial power (Engerman & Neves, 1997). The fear of losing parts of the Empire had been present along its history. This fear originated from the realization that the continental territory of the former Portuguese Empire was, in comparison with its former 'possessions', inconceivably small. To a certain extent, reminiscing about and holding on to past achievements partly shapes the Portuguese identity. As Jerónimo and Vink (2011) explain:

Portugal was the last of the European empires to surrender its colonies and it was the one which suffered most from the loss of the empire. The independence of the overseas territories was not a mere reduction of the space where Portuguese sovereignty could be exercised. The idea of a pluri-continental nation, built on the Lusotropicalist perception of Portugal's gift for intercultural dialogue, was, and to some extent still is, a powerful element of Portuguese psyche (Jerónimo & Vink, 2011, p. 112).

As expressed in the quote above, the origin and *raison d'être* of Portuguese culture are still strongly connected to its maritime expansion and geographic position. Before going deeper into the main concepts of Lusophony and Lusotropicalism, already briefly mentioned in previous sections, allow me to start by stressing that the concept of Lusophony – hereafter referred to in Portuguese as *Lusofonia* – invokes confusion and discord, in the words of McNee (2012), due to its geographic, demographic, and even linguistic imprecision. This subsection does not aim to strictly delimit the concept and the ideals, mythologies, and imaginaries it stands for. It is merely an attempt at touching upon a concept that is crucial to the formation of Portuguese identity and its subsequent relation to former colonies, to say the least.

Lusofonia encapsulates to a large extent the "imaginary refuge" and the "imperial nostalgia" of the Portuguese (Martins, 2004, p. 2). According to Martins (2004), Lusofonia can be seen as a space of culture – of a Lusophone culture. This character, however, is not of a single nature and the Lusophone imaginary (or Luso-Brazilian as proposed by Gilbert Durand (1997) and set out by Martins (2004)) does not apply to all Lusophone countries in the same way. Whilst Portugal, for instance, identifies itself with the sea and the explorations, the Brazilian imaginary focuses on the immense land that composes the country (Martins, 2004). Furthermore, Moreira (2010, p. 59) argues

that although not all the Portuguese speaking countries have Portuguese as their main language, we can still undoubtedly speak of a "Lusophone space" occupied by these countries. In fact, I would like to argue that the idea of Lusofonia holds relation with both the Portuguese culture with an emphasis on the Portuguese language, and with the Portuguese people and how they relate to their colonial past (the supposed "imperial nostalgia").

As I see it, the past accomplishments of the Portuguese nation in regard to its colonial expansion have strongly influenced the course of politics and international relations along the years. Although most, if not all, definitions of Lusofonia emphasize the linguistic and cultural aspects of the concept, it has been mainly used and popularized as a strategy in the political arena (Jerónimo & Vink, 2011). In fact, this has happened clear on two occasions: during Salazar's regime, and around the accession of Portugal to the European Union.

Lusofonia played its first important role during Salazar's dictatorship by building strongly on the work of Gilberto Freyre, a Brazilian anthropologist, who coined the term Lusotropicalism in the 1930s (Martins, 2011). As the pressure to decolonize started building up on Portugal in the 1950s, one of the strategies employed by Salazar's regimes was to focus precisely on the construction of a "Lusophone imaginary" by emphasizing the achievements of the Portuguese in spreading their language and culture, and by stressing the connection between Portugal and its (former) colonies (Jerónimo & Vink, 2011; Martins, 2011). The figures below illustrate how Salazar's government built on the idea of greatness of the Portuguese people (from Martins, 2011):



Figure 5 The Lusophone imaginary at use during Salazar's regime

According to Freyre, Lusotropicalism is what led the Portuguese to combine the European and the tropical cultures by mixing races, languages, and cultures (Santos & Amorim, 2010). Freyre believed that Brazil would not be Brazil if it were not for Portugal as its colonizer: the particular way in which the Portuguese, themselves a mixture of many cultures as pointed out by Burns (1980), went about colonization, mixed with the local people, and brought in new cultures, was crucial in the formation of the Brazilian nation as it is known today. In his book *O Mundo que o Português Criou*²⁹, first published in 1940, Freyre (2010) emphasizes the miscibility of the Portuguese people and the Portuguese influence in Brazilian society, not only linguistically, but also at the level of religion, traditions, ethnicity, and even folkloric. In the introduction one reads:

Although the author's [my] point of view is always that of unity of sentiment and of the culture formed by Portugal and by the many arrays of Portuguese colonization in America, Africa, Asia, and on the islands, the main elements addressed are: Portugal, the creator of so many people [cultures],

²⁹ The title could be translated in English to 'The World the Portuguese Created'.

today essentially Portuguese in their most characteristic lifestyles, and Brazil, the country where this process of stretching an ancient culture in a new, and vaster culture than the maternal one, has achieved the greatest intensity (Freyre, 2010, pp. 17-18, translation by the author).

In a way, Lusotropicalism stands for the Portuguese (Lusophone) way of colonizing the tropics, mixing with the people and the culture in order to create new cultures. This admiration for the Portuguese cultural features, which are in fact also so embroiled in Brazilian society, was precisely what was employed by Salazar in his attempt to defend his 'Ultramarine Provinces' by emphasizing a certain plurality of the Portuguese nation and its multicultural society. This was used to propagate an idea of the Portuguese as more 'humane' colonizers. The idea of Lusotropicalism in itself, however, was never explicitly meant to defend the ideals of Salazar of holding tight to the last colonies, by which I mean it was not Freyre's intention to defend colonialism, but rather to propose multiculturalism as a common denominator of a language as homeland³⁰ (Martins, 2004, p. 7). As Martins (2004) explains, the idea of Lusotropicalism proposed by Freyre did not propose the Portuguese lifestyle, but it acknowledged the importance of the Portuguese culture and language in the creation of different cultures and nations, different people. According to Jerónimo and Vink (2011), the idea of the Portuguese as better and more humane colonizers still remains among the Portuguese people.

After the Carnation Revolution of 1974, and the subsequent independence of the last Portuguese colonies, Portugal was left to reshape and reorganize itself in the fast-paced and increasingly interconnected international system (Freixo, 2010). After decades of relative isolation under the Estado Novo, a now considerably smaller Portugal was bound to find a way of inserting itself in the global economy. According to Freixo (2010), the processes of European integration that followed the abandonment of the so-called "Atlantic Politics" in place before the Revolution, were important in the redefinition of Portuguese identity. The insertion of Portugal in the European Union raised essential questions in relation to the Portuguese *ethos* – many had doubts whether Portugal should be perceived as an European or 'Atlantic' country and culture (Freixo, 2010, p. 70). It is in this context that the Lusophone imaginary played its second important political role. The discourse surrounding the real Portuguese *ethos* revolved around a strong cultural mythology within Portuguese society. By highlighting the achievements of the Portuguese people in past centuries, and the Portuguese way of life, not only did the political elites address an emerging Portuguese nationalism, but it also ascribed a certain sense of cosmopolitanism to it, taking it again further than its own Iberian territory (Freixo, 2010). Thus, according to Freixo (2010), the founding of the Community of Portuguese Speaking Countries (CPLP by its Portuguese acronym), can be perceived as a natural unfolding from the Lusophone discourse and as a fundamental step in the reconstruction of Portuguese identity. Important as the creation of the CPLP may have been for Portugal and its international politics, its creation had fewer attention and repercussions in Brazil (Freixo, 2010).

4.3.1 *The Community of Portuguese Speaking Countries*

The *Comunidade dos Países de Língua Portuguesa*, hereafter CPLP, was founded in 1996 and counts eight members: Angola, Brazil, Cape Verde, Guinea-Bissau, Equatorial Guinea, Mozambique, Portugal, São Tomé e Príncipe, and East Timor (CPLP, 2014). The possibility of founding a Luso-

³⁰ Although this might be simply related to the fact that Portuguese is my mother tongue, I feel like 'pátria', which is the term used by Martins (2004, p. 7) to explain his idea, goes beyond the English word 'homeland'. To a certain extent it encompasses more feeling – of belonging perhaps or nationalism – than the English word does.

Brazilian community had been discussed since the beginning of the 1920s, thus long before the process of decolonization from the remaining Portuguese colonies took place in the 1950s (Moreira, 2010). As the former Brazilian ambassador allegedly argued, "the idea is as old as our language" (Moreira, 2010, pp. 60, translation by the author). A century ago, however, only a strict Luso-Brazilian community was discussed, since most of the current members were still colonies of Portugal. This idea got momentum in the 1960s due to the foundation of the Institute for Brazilian Studies at the newly founded University of Brasília, and the Institute for Afro-Asian Studies at the University of Bahia (Moreira, 2010). Despite the revival of the idea, historical events got in the way of any kind of official consolidation of the project – the Carnation Revolution in Portugal in the 1970s, followed by the arduous process of decolonization in Africa, the consolidation of these new independent states, and the redemocratization of Brazil in the 1980s after twenty years of military rule all served to delay the process by some decades.

Today, as the website of the organization states, the objective of this "multilateral forum" is to "deepen the mutual friendship and cooperation between its members" (CPLP, 2014). According to Moreira (2010), the CPLP has achieved fruitful cooperation at the cultural-linguistic and the political-diplomatic level as well as at the level of technical cooperation, the latter being of considerable importance due to the socio-economic asymmetries visible between the countries. At the level of human mobility between the members of the CPLP (or "circulation" according to the organization's website) agreements have also been reached, although they do not reach as far as some members would have hoped. These agreements allow, for example, for multiple entry visas for some categories of travelers, temporary visas for medical purposes for citizens of the CPLP, and special desks at the entry and exit posts of airports for CPLP citizens (CPLP, 2014). Attempts have also been made, at meetings in 2002 and 2006, to reach a more encompassing agreement that would benefit citizens of the eight member countries in relation to their rights and duties as residents of other member countries (Leitão, 2009). Roughly speaking, the signing of such an agreement would guarantee political, economic, and social rights for CPLP citizens residing in other member countries based solely on their nationality as citizens of the Community. However, achieving this *Lusophone Statute* has proved a particularly difficult process, partly due to the authorities of Angola and Mozambique (Leitão, 2009). So far, agreements of such a broad nature have only been reached between Portugal and Brazil – the *Equality Statute* previously mentioned – and between Portugal and Cape Verde in the *Lusophone Statute* (Jerónimo & Vink, 2011; Leitão, 2009).

Besides the free or facilitated circulation that is aimed for between the CPLP members, the idea of citizenship also plays an important role in the discourse of the CPLP. Ideally, the condition of *citizen* of the CPLP, regardless of which member nationality one has, should be more solid and meaningful (CPLP, 2014). According to the ideals and foundation of the CPLP, the idea of a Lusophone citizenship should develop from the shared language that unites the members (Leitão, 2009). When addressed from this perspective, however, the ideals of the CPLP seem indeed clearly 'Lusitanian' (Freixo, 2010). While one can read on the website of the CPLP that the Community has been developing cooperative links at great speed, Freixo (2010, p. 74) argues that the CPLP has been having trouble establishing itself, precisely because the "political mythology" on which it was founded is essentially a Lusitanian mythology. Personally, I believe in the benefits of a well-functioning and cooperating CPLP, much like the European Union and other supranational organizations that can be perceived as the embodiment of globalization in the sense of free (human) circulation and increased interconnectedness. However,

I tend to agree with the concerns expressed by Freixo (2010) in relation to the lack of attention for the multicultural aspects of Brazilian and African societies in the discourse presented by the CPLP. An emphasis on the shared language (Leitão, 2009), or even more broadly on the “Portuguese way of being in the world” (Freixo, 2010), stresses the Lusitanian character of the organization, but ignores innumerable other cultural contributions that have formed the other members’ societies. It is precisely in this discourse, I argue, that the redefinition of the Portuguese identity has found legitimization and has been substantiated. However, since cooperating international or supranational organizations can be advantageous to all members, the most important step seems to be to reinforce the individual aspects of the countries instead of avoiding cooperation out of fear to lose one’s identity. The current context of crisis might be especially beneficial to countries such as Angola and Brazil to profit from their current economically advantageous position in the world and within the CPLP.

In sum, one can conclude that the relationship between Portugal and Brazil remains ‘special’ given the treaties and agreements that are still in place and the various larger attempts at cooperation, such as the CPLP (albeit with other members included). Mobility and citizenship play an important role as was discussed in relation to the CPLP, but Luso-Brazilian relations have been hampered for the past decades mainly due to Portuguese accession to the European Union and the subsequent concessions that have been made. In agreement with Barbosa (2008), I would argue that the efficient and strong legal and institutional relationship between Portugal and Brazil should be seen as an opportunity to strengthen ties and go beyond the historical, linguistic, and cultural linkages. Approaching the Luso-Brazilian relationship from the perspective of migration, and more specifically the greater North-South migration flows of the past years, is one way of looking at the areas in which cooperation could still be improved. The reciprocity principle that has always been fundamental in the relations between Portugal and Brazil should of course be kept in mind.

5. *International Migration in/between Portugal and Brazil*

In Chapter 2 was argued that Portugal and Brazil constitute the traditional members of what can be perceived as a Lusophone Migration System. This chapter's objective is to show the importance of flows of immigration and emigration in Brazil (section 5.1) and in Portugal (5.2), not only in connecting them, but also in shaping the countries' identity. The focus will be mainly on the exchange of people between both countries, with an emphasis on the importance of Portuguese emigration to Brazil and Brazilian immigration in Portugal. Section 5.3 presents the main characteristics of the current North-South (Portugal-Brazil) flows in the light of the 2008 global economic crisis. Finally, there will also be attention to the main linkages that were discussed in the second chapter – mass cultural connections (5.3) and regulatory linkages (5.4) – and their influence in the current flows of Portuguese migration to Brazil.

5.1 *Brazil: the Reflection of Centuries of International Migration*

Brazil is frequently referred to as a country of immigration. The Brazilian population is, without a doubt, a mix of different cultures and nationalities. From a historical perspective, the immigration flows in Brazil has been extensively studied by Brazilian scholars (Amaral & Fusco, 2005; Demartini, 2006; Levy, 1974; Patarra, 2003). This section's purpose is to outline the different flows of international migration that have helped shape the country as we know it.

As has been outlined above, the Portuguese have been an influential group in the formation of the country's population from the first decades of colonization in the beginning of the sixteenth century. The second most relevant influence was the 'forced immigration' of Africans as slaves, something that started in 1550, just a few decades after Brazil's 'discovery' (Levy, 1974). Later on, the abolition of slavery also impacted immigration in Brazil by inciting free labor migration for the first time at the beginning of the nineteenth century, as will be explained further on. However, despite the great importance of immigration in building the country, the numbers, rates and origins of immigrants in Brazil have fluctuated along the years. In general, however, the period between 1808 and 1940 is seen as a period of mass immigration in Brazil. It started 1808, when the Portuguese Crown settled in Rio de Janeiro, and lasted until the beginning of World War II in 1940.

Aside from the Portuguese as colonizers and the Africans who were brought to Brazil as slaves, it was only after 1808 that the first labor migrants settled in Brazil (Amaral & Fusco, 2005; Levy, 1974). João VI is said to have brought European scientists and scholars with him to Brazil when the Crown relocated from the metropolis to the colony, although neither their nationalities nor numbers are specified (Bieber, 2001). As Burns (1980, p. 261) argues, each step taken in the direction of the abolition throughout the nineteenth century meant a proportional increase in the number of European immigrants arriving in Brazil. Although many Europeans saw quite a few disadvantages in migrating to Brazil – many believed all of Brazil had tropical weather, and Protestants were reluctant to migrate to a Roman Catholic country – a few did migrate in search for a better future. During this new era of immigration, Swiss and Germans were the first considerable groups of immigrants. In 1819,

receiving aid from João VI in an attempt to further colonize his vast land, some 2.000 Swiss migrants settled in Brazil to form the colony of Nova Friburgo in the mountainous region of the state of Rio de Janeiro (Burns, 1980, p. 261). Nova Friburgo became the first non-Portuguese speaking colony in Brazil, but soon other German-speaking colonies were to be founded towards the South of the country (in Santa Catarina and Paraná, where the climate resembled the European climate). By 1830 some 7.000 Germans had migrated to Brazil (Burns, 1980). Around this time, the employment of migrants in the same jobs as slaves was prohibited by the government, eager to attract more immigrants, since one of the main fears of Europeans considering migration was the possible labor market competition from slaves.

In 1850, the Queirós bill ended slave trade, aggravating the labor shortage Brazil was already experiencing. Slaves were the largest labor force planting, harvesting, and preparing crops for export on plantations. To a smaller extent they were also employed in the cities as mechanics and artisans (Burns, 1980). Plantation owners tried several strategies to cope with these shortages, such as recruiting slaves internally from less prosperous areas of the country, enslaving Indians, employing dependent sharecroppers, and importing European contract laborers (Bieber, 2001, p. 31). The latter strategy turned out to be the most effective, and by mid-century some 20.000 migrants had already settled in Brazil. Once again, during these first decades of European immigration, Swiss and German *colonos*, as the migrants were called, predominated. As this strategy gained in popularity, so did it in adherents – between 1847 and 1857 around 70 similar attempts were made to bring more immigrants to Brazil (Burns, 1980). However, immigration agents in Europe, who were responsible for the recruiting of workers, started using deceiving practices on both ends (plantation owners and emigrants) to increase their profits. Negative accounts of immigrants that the relations were not equal and more favorable to the land owners started reaching Europe. As a response, Germany prohibited further emigration to Brazil, forcing planters to turn to Southern Europe: Italy, Spain, and Portugal were back in the picture (Bieber, 2001). Immigration increased even more rapidly after 1870 due to the passing of the Law of the Free Womb in 1871, granting freedom to slave children upon reaching the age of 21. To illustrate this development it is interesting to point out that, in the year 1850 2.072 immigrants entered Brazil; in 1860 15.774; in 1870 the number was 5.158 (but in 1871 12.431); and in 1888, the year of the abolition of slavery, the number more than doubled from 55.965 a year before to 133.253 (Burns, 1980, p. 264).

According to Levy (1974), the time lapse from 1872, a year after the Law of the Free Womb, and 1972 can be divided in four periods based on the origin and numbers of the immigrants entering Brazil. The first period proposed by Levy (1974) ranges from 1820³¹ to 1876, during which the number of immigrants entering the country fluctuates between 10.000 and 20.000 every year, mainly to the colony of Nova Friburgo, as explained above. During this period, the Portuguese were still predominant, although the number of German *colonos* was also considerable. The focus during this period was on colonization, either through government incentives or private initiative, with immigrants settling in colonies or in urban centers. Until 1876, 350.117 Portuguese (45.73% of all immigrants) entered the country.

The second period took place from 1877 to 1903 and was characterized by high numbers of Italian migrants (58.49%), while Portuguese immigration decreased considerably to 20% of total

³¹ Levy (1972) takes the smaller waves of immigration that started from the first half of the 19th century into account in this first main period of immigration, thus from 1820 to 1876, although her article focuses on the 1872-1972 timeframe, for which more accurate information seems to be available.

immigration. The total number of immigrants in this period is of 1.927.992. After 1875 Rio Grande do Sul, one of the three most Southern states, started offering financial help to stimulate immigration, attracting incredibly high numbers of Italians to the South of Brazil.

Between 1904 and 1930 2.142.781 migrants entered Brazil – an annual average of 79.000. Until the beginning of World War I in 1914, as the number of Italians dropped considerably, the Portuguese constituted 38% of total immigrants, and the Spanish 22%. It is also during this phase that Japanese migration starts playing a role, mainly subsidized by Japanese companies. During WWI, the second largest category was composed by 'other' nationalities, such as Polish, Russians, and Romanians, and, more generally, Jewish migrants. In 1930, the first measures to restrict international migration, known as the 'Lei de Cotas', were put in practice – in the Constitution of 1934 and 1937, only 2% of the total number of an immigrant group (nationality) already previously settled in Brazil was allowed to join their compatriots (Geraldo, 2009).

The fourth and final considerable period of immigration took place roughly between 1930 and 1963. Until the beginning of WWII, around 29.000 immigrants entered Brazil annually. During this period, Japanese immigration experienced a peak twice, in 1932 and 1935, corresponding to 30% of total immigration during the decade before WWII. During the war, immigration dropped to 2.000 new entries annually. The new Constitution of 1946 eased the Lei de Cotas, leading numbers to peak slightly again, to 44.000 entries annually. Until 1963, the largest groups continued to be the Portuguese and diverse nationalities gathered under the denominator 'others'. Italian and Spanish immigration increased slightly, while Japanese immigration decreased. From 1964, international migration in general saw a massive decrease. Some sources indicate that internal migration characterized the population shifts in Brazil from the 1940s until the 1980s (IOM, 2010). Due to the fact that emigration was also a practically inexistent phenomenon in Brazil, we could say that the country was "closed to emigration" during these decades (IOM, 2010)

According to Levy (1974, p. 55), the immigrants that arrived in Brazil in the period 1872-1972 were 31.06% Portuguese, 30.32% Italians, 13.38% Spanish, 4.63% Japanese, 4.18% Germans, and another 16.42% of a mix group which is not further specified. Aside from the labor shortages that were being experienced in Brazil, especially after the abolition of slavery, some authors reason that plantation owners were reluctant to hire ex-slaves out of prejudice, while others argue opening the doors to European immigration was a deliberate strategy of the Brazilian government in order to 'whiten' society and bring in progress and civilization (Azevedo, 1987, p. 61; Levy, 1974, p. 52). Other arguments offered for the incentives provided to international migration are based on the relatively higher costs of internal versus international migration, the so-called 'push' factors in countries like Italy, and the possible resistance offered by interest groups in case of internal transfers of workers (Levy, 1974). As it has been argued above, the Portuguese continued to dominate immigration to Brazil more than a century after independence, with the exception of a few decades in which Italian immigration predominated.

5.2 *Portugal: Emigration from the Country that "Invented Globalization"*

Brazil has been impacted at different levels by several waves of immigration, starting with the Portuguese and the African slaves during the first two centuries of colonization and continuing throughout the centuries until World War II. There immigrants were predominantly from European

origin. Portugal, on the other hand, has seen its national history and national identity shaped by both colonialism and constant waves of emigration (Brettell, 2003). In a similar way that the origins of immigrants arriving in Brazil have shifted throughout the years, so have the destinations of Portuguese emigrants (Brettell, 2003; Padilla & Ortiz, 2012; Serrão, 1970). Emigration *an sich*, however, can be perceived as a crucial part of Portuguese identity, as the following quote so nicely summarizes:

If the emigrant is a vehicle through which the Portuguese can think about their attachment to their homeland, their very nationality, if the emigrant is a vehicle through which the Portuguese can find their roots in their past, if the emigrant is a vehicle through which the Portuguese can represent their ecumenical and tolerant spirit, then the emigrant is also a vehicle for the expression of greatness – for the extension of thought beyond the boundaries of a small country wedged between Spain and the Atlantic Ocean at the very edge of Europe. The emigrant unbinds the Portuguese nation and Portuguese culture. It is this desire for unboundedness, this desire to escape the ever-prevalent thought that Portugal is um país pequeno (a small country), that one can find an explanation for the symbolic transformation from navegador [seaman] to colono [settler] to emigrante. Each was a symbol attuned to historical and political-economic circumstances: the navegador in the age of discovery, the colono in the age of settlement, the emigrante in the postcolonial period. The result of their journeys abroad is that Portugal is no longer a small country. It is this possibility for an international “Luso-American” nation Nuno Simões (1934, 193ff) evoked when he called emigrants the spiritual force of Lusitanism (Brettell, 2003, p. 19).

Thus, although globalization has accelerated and diversified international migration flows, it seems safe to state that Portugal has been inserted in population movements as far back as the fourteenth century (Costa, 2010). The Portuguese expansionist drive, strongly propelled by the rural poverty as a nation in the outskirts of the Iberian Peninsula, has led to a culture of conquests: from the cities to the world in search for upward social mobility and good fortune (Costa, 2010). However, this now traditional role of Portugal as a sending country has also been formed by specific global conjunctures, since it is particularly in the second half of the eighteenth century that waves of emigration really initiated (Serrão, 1970). Internal factors such as high levels of rural poverty, together with external factors such as the abolition of slavery in Brazil, and the increased demand for workers at the beginning of the industrial revolution, played a crucial role in the numbers and directions of Portuguese emigration (Serrão, 1970, p. 603). Generally speaking, the period between 1850 and 1914 (the start of World War I) is seen as an era of mass migration worldwide. Both immigration and emigration were taking place due to the rapid industrialization in some countries (Castles & Miller, 2009). Because Portugal proved unable to develop the industry at the same pace as countries such as Britain and Germany, and its agricultural sector had trouble competing with countries that were already starting to insert themselves in a so-called global market, it became a strongly migrant-sending country (Pereira, 1969).

Portuguese emigration has been divided in three phases by Baganha and Góis (1999). According to the authors, until Brazil's independence in 1822, Portuguese emigration was strongly linked to the imperial and colonial interests. Therefore they argue that the first actual migration phase was a strongly economic one, which took place between 1822 and 1960. Within this “transatlantic phase” (Padilla & Ortiz, 2012), the main destination of Portuguese emigrants were the Americas in general,

with Brazil as its greatest focus (Baganha & Góis, 1999). According to the authors, two million Portuguese left their country during this first phase. Table 6 illustrates the large amounts of Portuguese immigrants that arrived in Brazil along the centuries. These amounts seem particularly high if compared to the size of the Portuguese population in 1835 and 1911, for example, which was 3,061,684 and 5,547,708, respectively (Pereira, 1969). Although migration to North America is numerically of much smaller importance during this period, it is still worth mentioning in order to illustrate how far this secular tradition of emigration has reached. The roots of Portuguese immigration to New England, United States, can be traced to the early nineteenth century (Brettell, 2003). According to the author, while the US Census of 1870 reported just fewer than 9,000 Portuguese in the country, according to the 1930 Census an impressive number of almost 110,000 was reported; Canada reported around 20,000 Portuguese immigrants by 1960. Other smaller emigration countries across the Atlantic were Demerara (now Guyana), Saint-Kitts, Jamaica, and Surinam (Pereira, 1969). Argentina and Uruguay have also received Portuguese emigrants within the same timeframe (Carreiras et al., 2007).

Portuguese Immigration In Brazil by thousands: 1500 - 1940	
1500 - 1580	280.000
1580 - 1640	300.000 - 360.000
1640 - 1700	150.000
1700 - 1760	500.000 - 600.000
1820 - 1890	300.000
1891 - 1900	200.000
1900 - 1914	500.000 (90% of PT emigration at the time)
1919 - 1930	200.000
1931 - 1940	90.000

Table 6 Portuguese Immigration in Brazil (1500-1940)

The second phase of Portuguese emigration took place roughly between 1950 and 1974 and is characterized by a steep decrease in intercontinental flows (Baganha & Góis, 1999). Moreover, around the same number of people left Portugal during this period as in the first phase, which means the second phase was much more intense given the fact that it was also much shorter. During this second period, 59% of emigrants left for France and Germany as the main European receptors, while 30% still opted for Brazil (Baganha, 1994). France and Germany became, mainly due to their positive economic situation, the main destination countries for emigrants from many other countries on the periphery of Europe, such as Spain and Italy (Castles & Miller, 2009). Just like during the first phase of emigration, most of the Portuguese emigrants were from rural areas. During the 1970s, due to the oil crisis (1973) and the subsequent recession in Europe, many migrant-receiving countries in Western Europe started encouraging return migration and hindering immigration flows (Baganha & Góis, 1999)

Although the existence of a third phase in the history of Portuguese emigration is not disputed, and even confirmed by many scholars (Marques, 2009; Padilla & Ortiz, 2012), the exact time range seems to be quite fuzzy. For the sake of clarity, I am assuming in this thesis that this third phase ranged from 1975 to the beginning of the 2000s. Within this timeframe, however, different destinations and numbers apply to the emigration flows. The first decade (1975-1985) took place immediately after the Oil Crisis of 1973, which obviously had a deep impact on the outflows. These flows were heavily influenced by the situation in the former receiving countries of Western Europe, which diminished considerably the demand for labor from former sending countries in Southern Europe. While almost 1,3 million people left the country between 1964 and 1974 (during the second phase of emigration), the numbers for the period 1975-1985 are estimated at around 300.000 (Marques, 2009,

p. 9). According to Baganha and Góis (1999), the decreasing numbers in migration in the post-crisis era of the 1970s and 1980s holds relations to the lack of new and stable networks to bolster new emigrants. The flows that did exist were mainly constituted by family members of workers already living abroad (Marques, 2009), thus assuming the character of family reunification. This reduction in numbers led to a certain “invisibility” in regard to the outflow of people at all levels of society – mass media, politics, and research (Malheiros, 2011; Marques, 2009). Due to this lack of attention, relatively little is known about this period of Portuguese emigration (Baganha & Góis, 1999).

International migration numbers and flows changed drastically after the accession of Portugal to the European Union in the 1980s. From a strictly sending country to a country that both sends and receives people. Mainly because of the expectations of political elites that the country would acquire migratory patterns more similar to other Western European countries, thus receiving more people than sending, together with a perception of emigration as a symbol of backwardness of which Portugal should be ashamed (Baganha & Góis, 1999), the focus of attention remained away from the Portuguese emigrants and diasporas, and immigration started receiving more attention in the media, research, and politics (Malheiros, 2011). However, it is precisely during this period that Switzerland emerges as a new major destination for Portuguese emigrants, which it would continue until the mid-1990s (Marques, 2000). According to Peixoto and Sabino (2009), the first half of the 1990s also saw a slight increase in emigration to Germany due to the construction boom the country experienced after reunification. Around the beginning of the 2000s, another slight increase in emigration, again with flows directed to countries of the European Union, such as Britain, Ireland, the Netherlands, and Spain (Peixoto & Sabino, 2009). The present study deals with what can be seen as a fourth wave of Portuguese emigration, as it has already been referred to by Padilla and Ortiz (2012). However, before continuing with the current aspects of Portuguese migration to Brazil, it is interesting to briefly point out some characteristics of immigration in Portugal, especially because of the importance of the Brazilian diaspora in it.

5.2.1 (Brazilian) Immigration in Portugal

Due to the many different phases of emigration that have been explained, Portugal can and should be considered mainly as an important country of emigration. In fact, Portugal holds the 22nd spot on the ranking of countries with the highest number of emigrants – if considered as relative to the country’s population, however, the country jumps to 12th as 20,8% of the Portuguese live outside of their country (Pires et al., 2014, p. 27). The large majority of Portuguese emigration has been for economic/labor motives (Baganha & Góis, 1999). While the first waves were characterized by people from rural areas in the country with low levels of education, the latest emigrants tend to be strongly qualified (Malheiros, 2011; Padilla & Ortiz, 2012). In sum, Portuguese emigration should be perceived as essentially an international labor flow (Baganha & Góis, 1999).

Despite the fact that the emphasis of this study is on North-South flows, the theoretical approach chosen to the topic stresses the exchange of people between Lusophone countries. Therefore, it seems interesting to mention the inflows of migrants in Portugal, particularly because Brazilians have come to form an important group. Peixoto and Sabino (2009) argue the “short history of immigration” in Portugal can be subdivided in four clear phases:

- 1975-1980: immigrants from former colonies after independence and the Carnation Revolution;

- 1986-until the end of the 1990s: immigration based on “historical, linguistic, cultural and colonial links” from Brazil and PALOP countries³² ;
- Late 1990s: massive inflow from Eastern Europe, renewed and stronger Brazilian immigration, and a general diversification of origins, especially from Asia. The volume of immigration during this phase exceeded the previous phases;
- After 2004: significant drop in Eastern European immigration, stabilization of African immigration, and the continuity of Brazilian immigration.

As can be seen above, Brazilian immigration in Portugal has played an important role since the early stages of “immigration history” in Portugal. According to Padilla and Ortiz (2012), Brazilian immigrants made up 25% of the immigrant population in Portugal in 2011. Ukrainians, the second group of immigrants, were good for a ‘mere’ 11%, showing the numerical importance of Brazil in the total immigrant population of Portugal. After Paraguay, Portugal had the largest Brazilian population living outside of Brazil, at around 136 thousand or 1,3% of the total Portuguese population (Santos, 2013).

Since the beginning of the 2008 global economic crisis, there have been signs of return migration among Brazilians in Portugal as people started as people started choosing to either return home or try their luck in more diverse labor markets (Fernandes et al., 2011; Peixoto & Sabino, 2009; Santos, 2013). Although some authors argue the global economic crisis has not aggravated the phenomenon of return migration *per se*, mainly because of the lack of alternative re-migration destinations, the economic crisis and the lack of employment opportunities already showed up as a motive in a study conducted in 2009 by Fernandes et al. (2011) as well as in the media (Baptista, 2010). The 2013 IOM Report (p. 79) further confirms this trend. I argue, however, that if this is the case and return migration is only increasing, then this phenomenon serves to illustrate all the more the dynamic character of the Lusophone migration system, since it shows the flexibility in adapting to different conjunctures within the system.

5.3 Portuguese Emigration in the light of the Global Economic Crisis

In order to understand the impact of the latest economic crisis on international migration, it is important to first address the origins and the course of this crisis, before dwelling on to its consequences on international migration. The 2008 global financial crisis that originated in the United States had intense and prolonged repercussions on all five continents (Huwart & Verdier, 2013). As Huwart and Verdier (2013) argue, there were many causes for the financial crisis, but the main one was the excessive debt burden of Western households. In fact, the first tokens of a crisis emerged in the financial market due to the increase in mortgage loans – also known as subprime loans – granted to low-income households in the United States. These loans were attractive to lower-income families because of their initially low interest rates that would soon start rising. In order to make even more profit out of the loans, banks started converting the loans into securities, mixing it with other secured mortgage loans and trading it in the financial markets. This practice distributed the mortgage credit risks throughout the financial system, with all banks participating in this “show” in a race for short-term profitable financial operations (Huwart & Verdier, 2013). Due to the intertwined character of finance today, these securities piled up in all financial institutions worldwide. When households stopped being able to repay, this led to the loss of value of these securities. Banks no longer trusted

³² PALOP stands for Países Africanos de Língua Oficial Portuguesa (Portuguese Speaking Countries of Africa).

the financial products available on the market and stopped transacting. This led to the inter-banking crisis of July 2007 (Huwart & Verdier, 2013).

Six years ago, on September 15, 2008, the bankruptcy of Lehman Brothers, a major investment bank, triggered Western governments to intervene with other financial institutions in a similar situation in order to avoid the same fate. As Huwart and Verdier (2013) explain, there is a reason why the expression “too big to fail” is used to describe financial institutions that are so crucial to a country’s economy that banks cannot allow them to go down. The government interventions that were to take place from hereon did not stop the financial crisis to hit the “real” economy (Huwart & Verdier, 2013). The bank failures led to a credit shortage, blocking investments and corporate operations, bringing the global economy into a recession unseen until then.

Simply put, what is described above is the process of financial globalization. The financial, and the subsequent economic crisis, would probably not have gone global if financial institutions and banks worldwide were not deeply intertwined in their work. As Lane (2012b) explains, the 1990s were marked by a rapid growth in cross-border financial flows. Emerging economies were careful in their participation in this new tendency due to the Mexican and Asian crises of the 1990s that were still fresh in the heads of many. Developed economies, on their turn, embraced the model of financial globalization without being fully aware (or at least without a proper study of the possible results) of the consequences. Portugal, as a “peripheral country” within the European Union (EU) and the European Monetary Union (EMU), was hit particularly hard by the economic crisis (Baer et al., 2013), whilst Brazil as one of the emerging economies seems to have been able to stand its ground considerably well, despite some setbacks (Carrasco & Williams, 2012).

According to Lane (2012a), the ability of the European countries that adopted the euro to withstand negative macroeconomic and financial shocks had always been perceived as an essential condition for the success of the common currency of the Eurozone. After all, the implementation of one common currency not only eliminated the traditional adjustment mechanism between national economies, it also offered room for a free-rider problem as the European Union now had strong incentives to bail out countries that would tend to “overborrow”. The case of Portugal is different from other (Southern) European countries that have also been particularly affected by the financial crisis and subsequent economic recession in that Portugal’s economy had been falling into a downward spiral from the beginning of the 2000s (Torres, 2009). As one of the founding members of the European Monetary Union (EMU), Portugal aimed at price stability and sound public finances by adhering to the exchange rate mechanisms and later the euro (Torres, 2009). The expectation was that Portugal’s GDP would grow, allowing it to at least repay its growing debt stock (Baer et al., 2013). According to (Baer et al., 2013), this was supposed to happen through increased productivity in certain sectors by investing in the country’s competitive position in the global market. The investments in the infrastructure the EU committed to towards its peripheral economies would help achieve this goal. Furthermore, it was expected that with fiscal and monetary stability, open borders, with no exchange risk and a labor force considerably cheaper than in most other EU countries, Portugal would attract many multinationals willing to invest in the Portuguese economy (Baer et al., 2013).

Unfortunately, these expectations were not fulfilled. In fact, the Portuguese economy’s growth slowed down considerably at the turn of the millennium after an apparent pickup in the late 1990s (Baer et al., 2013; Torres, 2009). For instance, focusing on the numbers for unemployment, an

important dimension in this study, the rates went from 7.2% in 1996 to 4.4% in 1999 to 10.8% in 2010 (Baer et al., 2013). Statistics from Eurostat indicate an even higher number for total unemployment in 2010, namely 12.0% (Eurostat, 2014). Youth unemployment for the last three years has ranged from 30.1% to 37.7% (Eurostat, 2014). According to Baer et al. (2013), there are four main reasons for the disappointing Portuguese economy of the last decades: lack of productivity growth; loss of competitiveness; structural bottlenecks (in sectors related to justice, education, and public administration); and "the moral hazard behavior of living beyond its means".

Higher unemployment rates in many European Union countries, especially the so-called peripheral countries, has also been signaled by Bräuninger and Majowski (2011). As they point out, these previously "booming" peripheral countries of the European Union have been harder hit by the recent crises than the rest of Europe. In the particular case of Portugal, the authors argue that numbers indicate youth unemployment to be even higher than the average national unemployment rate, because young employees with fixed-term contracts are the first one to be laid off. In relation to the educational levels, people from the whole education spectrum seem to have been hit by the crisis, with no exceptional differences between low, medium or high-skilled workers.

Bräuninger and Majowski (2011) defend a relation between the readiness to migrate and the age and educational level of people. The younger and the better educated Europeans are, the greater the willingness to migrate. Experiences abroad through exchange programs or internships also make people more likely to consider migration in times of crisis. According to a Eurobarometer survey among 15 to 35 year-olds, 57% of the Portuguese indicated to be willing to work in another European country in view of the poor labor market prospects in Portugal (Bräuninger & Majowski, 2011). Furthermore, statistics from Europass (the European job portal) indicated that 80% of the Spanish, Irish, Greeks, and Portuguese who submitted their resume were under 35 year old, which seems to be an indication that young people are in fact more actively looking for jobs abroad³³.

5.4 *Mass Cultural Connections between Portugal and Brazil*

This section will explain why I have decided to focus on Mass Cultural Connections and Regulatory Linkages to approach migration flows between the 'core members' of the Lusophone Migration System in the 21st century

5.4.1 *Soap Operas, Music, and News: Bits and Pieces of Brazil in Portugal*

Before continuing with the mass cultural linkages between Portugal and Brazil, let me first repeat once again the aspects that these linkages entail as explained in Chapter 2. In this study, I will focus on the following aspects as they perceived by Fawcett (1989) as expressions of mass cultural linkages between two countries:

- International media diffusion (in this case I will focus on Brazilian media diffusion in Portugal);
- Societal acceptance of immigrants;
- Cultural similarity;
- Compatibility of value system.

The first aspect (international media diffusion) will be explained in the next section (3.4.1). The other three aspects are, directly or indirectly, based on the shared (migration) history between the

³³ In these European databases no data could be found on the willingness to migrate to a country outside of the EU. In my perspective, this indicates the greater focus of attention on European mobility versus worldwide migration flows, which is also indicated by Pires et al. (2014).

countries, which has been set out in Chapter 4 and the previous sections of this chapter.

When Fawcett (1989) mentions “international media diffusion” as one of the aspects of mass culture linkages between Portugal and Brazil, it seems impossible nowadays to leave out social media and the Internet as means of communication and diffusion. In the context of this thesis this is an important aspect to point out because, as will be explained in Chapter 4, my respondents were also approached through Portuguese communities (groups) on social media websites. Finally, as will be argued below, social media plays a role for the Brazilian immigrant community in staying in touch with Brazilian culture, which leads to a greater spread thereof in Portugal.

It seems safe to say that Portuguese people are confronted with Brazilian cultural products on a daily basis. The first Brazilian soap opera (*novela*) to be broadcast in Portugal, was *Gabriela, Cravo e Canela* in 1977 (Cunha, 2003). As Cunha (2003) explains, the broadcasting of this first soap opera happened during a period of transition in and for Portugal, both at the local and the global level. In 1976, just a year before *Gabriela* was broadcast, the first free presidential elections took place after a two-year long process of restructuration of the country. This restructuration and reorganization was brought about by the Carnation Revolution of 1974, which can be perceived as a “social revolution” as a pathway to democracy (Fishman, 2011). The IMF was imposing economic restrictions on Portugal; Angola and Mozambique were dealing with intense conflicts; Brazil was still under a military dictatorship and the Cold War was still going strong. According to Cunha (2003), *Gabriela* is associated, directly or indirectly, with three major changes in Portuguese society in the late 1970s. Firstly, the soap opera showed the country a new way of living after forty years under a dictatorial regime and two years with television channels strictly regulated by the government. It is associated with a “return to the normality of democracy ... and economic liberalization” (Cunha, 2003, pp. 70, translation by the author). Secondly, the expansion of Brazilian cultural products in Portugal reinforces Portuguese identity by making reference to elements of both the colonial and the recent history of Portugal in relation to its colonies. The success of Brazilian cultural products not only emphasizes the common language, but also “a common imaginary of myths, heroes, happenings, landscapes, recollections and longing³⁴ easily identified by all Portuguese”, and particularly valued in the aftermath of the ‘lost’ of the former colonies (Cunha, 2003, pp. 71, translation by the author). In my view, the feeling and perspective emphasized by Cunha (2003) illustrate a practical aspect of Lusofonia as explained in the previous chapter. It stresses the common language, while also allows space for the ‘Brazilian imaginary’, which is also, to a certain extent, the Portuguese imaginary as based on the country’s past achievements. Finally, the presence of Brazilian soap operas led to a transformation of daily lives in the former colonial metropolis. The rhythms followed by the typical Portuguese family, for instance, were heavily dependent on the time *Gabriela* was broadcast, new consumer practices emerged based on the fashion transmitted by the soaps, and the public reaction to open sensuality/sexuality changed considerably, since Brazilian soaps have always been more open in that regard (Cunha, 2003).

In relation to music, Brazilian Popular Music³⁵ (MPB, in the Portuguese acronym) made its way

³⁴ I translated the Portuguese word *saudade* as “longing”, although it means a lot more than that, certainly in the context of a “Lusophone Imaginary”. Although it deserves a longer and more concise explanation (see Chapter 5), I would like to make the link between *saudade* and the Lusophone imaginary as being partly “a memory of a common past, a partition of common culture and history” (Sousa, 2005). *Saudade* is, I argue, also something you can feel for the time when things were the same and two countries and culture now quite distant, used to be very close. This perspective has also been mentioned during my fieldwork by interviewees.

³⁵ MPB is not so much a music genre as it is a term that encompasses various famous Brazilian music styles, such as samba, samba-canção, baião and other regional styles, and even the influential Tropicália movement. MPB is also influenced by foreign styles such as jazz. Famous ‘representatives’ of these different styles include Chico Buarque, Jorge Ben, Novos Baianos, Dominguinhos.

across the ocean around the same time as the soap operas. Many icons of Brazilian Popular Music sought exile in Europe at the height of the Brazilian military dictatorship and right after the Carnation Revolution (Monteiro, 2011). Towards the end of the decade, as already pointed out above, Brazilian soap operas also played an important role in spreading both the classics of Bossa Nova and Brazilian rock of the 1980s even further (Monteiro, 2011). Another crucial development in the history of Brazilian music in Portugal took place from the 1990s onwards as Portugal underwent a shift from a country of emigration to a country of immigration. Increased Brazilian immigration in Portugal brought new and different musical influences that were often nothing like what used to be considered "Brazilian music", showing a diverse musical spectrum: from pop to brega and hip-hop. Paradoxically, as Monteiro (2011, p. 56) explains, since the last considerably large wave of Portuguese immigration in Brazil took place in the 1940s and 1950s, Brazilians continue to perceive Portuguese musical culture as "fado-folkloric" and to a certain extent also outdated. This illustrates the increased ease and speed with which cultural products and ideas are spread, particularly when they 'travel' with newer flows of migrants. Due to the South-North pattern of the exchanges from the 1980s until a few years ago, since Brazilian immigration in Portugal became increasingly more important than Portuguese immigration in Brazil, Brazilian cultural products tend to "weigh" heavier in the system. This serves to make a case for the clear role fulfilled by immigrants in spreading cultural products between both countries as well as for the faster circulation of media products through the improvements in ICT and Internet pointed out above. According to Cunha's (2008) research on the use of television and internet by immigrants in Portugal, African and Brazilian immigrants not only find MSN, email, chat groups and Orkut (a social media website) of great importance in an attempt to stay in touch with family and friends in the countries of origin; they also mentioned Brazilian soap operas as one of the programs most watched. For Brazilians it seemed like a way of maintaining a connection with the country, its culture and landscapes, and in order to keep up with societal changes (as small as fashion for instance). African immigrants preferred Brazilian soaps because of their historical value and their approach to societal issues such as racism (Cunha, 2008, pp. 88-89). The vivid presence of these soap operas and other products in Portugal has also served to teach Portuguese viewers a lot about the present situation of their former colony (Cunha, 2008).

An interesting perspective on the effects of the presence of Brazilian cultural products and Portuguese media attention for Brazil is offered by Lisboa (2009). According to the author, the contemporary representation and image of Brazil in Portugal is still predominantly based on historical-colonial ties. He argues interviewees of different cultural and educational backgrounds, when questioned on what they know and think about Brazil, tended to emphasize the natural beauty and the natural resources of the country as well as the immense size of the former colony. In doing this, the focus was often on what Portugal "gave" Brazil (religion, language) and what Brazil "gave" back during colonization (Lisboa, 2009, p. 59). Cultural products and features of Brazil and Brazilians in the media have, the author argues, always emphasized existing stereotypes. The so-called "Brazilianness" (*brasilidade*) that can be found in the beautiful landscapes shown on the news and in the soap operas, and the sexy women represented in soaps and in the music are often stressed (Lisboa, 2009, p. 61). Criminality is another element that seems to be "typically" Brazilian as it is associated to the lack of rules and the barbarism of the Brazilian culture (p. 63). In this regard, however, Lisboa (2009) differs from Sousa (2002) in that he sees the attention Portugal pays to Brazil to be predominantly negative. Sousa (2002) examined the major newspapers and magazines (printed

press) over the year 1999, concluding that, overall, the information transmitted to the public about Brazil is positive: the country is presented as a country of music, television and soccer, but also a country of economic opportunities (an idea apparently already in place fifteen years ago, long before the current economic crisis erupted). According to Sousa (2002), the attention Brazil receives in the Portuguese press is mainly due to the “proximity” (affective and linguistic) between both countries. In an attempt to verbalize what Brazil still feels like to Portugal, Sousa (2002) argues:

Reading the Portuguese press, Brazil arises for the Portuguese as a country that is at the same time close and distant, but a country that speaks the same language and a land of opportunities. If Portugal ever had a historical purpose, this purpose might have been [discovering] Brazil. Maybe one of Brazil's purposes, involved in MERCOSUL, orbiting around NAFTA and the United States, might as well be called Portugal... (Sousa, 2002, p. 44, translation by the author).

Based on his analysis of media sources, Sousa (2002) concludes that Portugal still seems to rely considerably on the relationship with its former colony and on how that can be of some interest internationally. This strategy appears to have been maintained throughout the years since Salazar's tactic of rapprochement in mid-20th century. Finally, the effects of the existing historical-cultural ties and the presence of cultural products from and media on Brazil in Portuguese society serve to reinforce the general idea of the country and its people. Mainly due to the historical, cultural and linguistic proximity, Brazil seems to the Portuguese to be much closer than it geographically is, especially if compared to other countries. This happens in two distinctive ways. On the one hand, media products serve, on top of the secular historical-linguistic ties, as a linking factor between both countries nowadays. On the other hand, through the information spread via this media Brazil still seems to be depicted as a paradise, a land of opportunities, and a country that might still “give” something good back to Portugal. I argue this ‘cultural/mediatic’ connection is a strong linkage between countries in the case of the Lusophone migration system. These linkages cannot be neglected in this study as it is expected to be of significant importance in the decision of the Portuguese to migrate to Brazil, whether this influence is conscious or not. It is important to realize that this particular ex-colony still seems to be perceived rather melancholic and with a certain sense of *saudade* for the time that has passed and for what the enormous country has been able to give and teach Portugal. My assumption is that this new generation of Portuguese immigrants feels more connected to Brazil due to the many Brazilian cultural features present in Portuguese society. The next section will briefly mention some of the rules and regulations that govern immigration in Brazil, especially in regard to (Portuguese) labor migration.

5.5 Regulatory Linkages: Governing Immigration in Brazil

Besides mass cultural linkages between Portugal and Brazil, the regulatory linkages between both countries will also be analyzed in this study. For the sake of clarity, let us point out the aspects seen by Fawcett (1989) as characteristic for the regulatory linkages:

- Immigration and emigration policies;
- Rules and regulations governing migration processes;
- Contracts with migrant workers.

This subsection aims to briefly deal with aspects in relation to (Portuguese) labor migration in

Brazil. Although these aspects are in no way applicable only to the case of Portuguese immigration, it is important to point out how Brazil deals with labor *immigration* in order to understand the process of highly-skilled Portuguese immigrants (the unit of analysis in this case study) decide to confront when they choose Brazil instead of a European destination. The aspects highlighted here will not, however, be dealt with separately. I would like to point out that Portugal and Brazil have a number of agreements that either facilitate circulation and migration or propose exceptions for the country's nationals, as explained in Chapter 4. Some aspects are important to highlight in relation to Portuguese immigration to Brazil, such as the need for a visa and the bureaucracies surrounding contracts with migrant workers.

First and foremost, I believe the main practical difference between migrating within the European Union and migrating to Brazil, for a Portuguese, is what I would call a mobility constraint in the sense that establishing residency in Brazil is a much more complicated process³⁶. Whilst a Portuguese who chooses the United Kingdom, Germany or France to look for work does not have to worry about work permits or visa, choosing Brazil has other implications. As has been argued before, accession to the European Union in the 1980s has helped reinforce the intra-European character of Portuguese emigration even further. However, the current economic crisis has, despite the legal obstacles, seen a rise in migration to Brazil. Therefore, it seems important to touch upon a number of aspects in Brazilian legislation that can be of influence in the decision-making process.

Although Brazil has had its fair share of labor migration in the past, as was explained in Chapter 4, the country has never, historically, been on the list of destinations for high-skilled migration. Therefore, although studies on the matter seem to be emerging (Coentro, 2011; Patarra, 2012; Ruediger et al., 2013), the country still seems to be only slowly getting used to the level of attraction it has on highly-skilled and unemployed (young) people across the globe. In a comparison between the United States and Brazil based on the work permits issued to highly skilled nationals, Coentro (2011) points out that between 2007 and 2009, the number of visa issued to Brazilians in the United States declined by 30%; during the same period Brazil issued 45% more work visa than before (although this number is not restricted to US citizens, incorporating different nationalities). This illustrates, according to Coentro (2011), that the repercussions of the 2008 economic crisis were significantly smaller in Brazil in comparison to the US. However, despite the fact that recent studies on the topic make a case for the benefits of skilled migration, the Brazilian legislation that governs immigration – Law N° 6.815 commonly known as the Foreigners' Statute and already explained in the previous chapter – is certainly still not prepared to deal with this kind of immigration (Coentro, 2011).

As explained by several authors, Foreigners' Statute regulates immigration in all its forms (Coentro, 2011; Machado, 2012). This law was created in the 1980s during the military dictatorship and had as its main concern to "immobilize difference" in an attempt to guarantee the national security by avoiding possible political threats (Machado, 2012). The law implemented seven different kinds of visa for foreigners: transit; tourism; temporary; permanent; courtesy; official; and diplomatic. For the past years, Law No 6.815 has been criticized for being outdated since it deals with immigration from the perspective of national security; it ignores international treaties; and it exposes non-nationals to insecure situations in relation to human rights since they are completely deprived from any political rights (Coentro, 2011, p. 88). Coentro (2011) points out that several attempts have been made during

³⁶ As explained in Chapter 4, this has not always been the case. Until the beginning of the 1990s, the Portuguese enjoyed certain privileges in Brazil (and the Brazilians in Portugal) that facilitated settlement in the new country.

the past decades to alter the law, although it has still not gone much further than some considerably minor changes. In 2009, a new project was filed to change the law in which more kinds of visa were considered. In regard to the rights of immigrants, however, little was accomplished along the decades. In relation to skilled migration, it suffices to say that there is no specific mention to it in Law No 6815. The different types of visa that could be applied for by highly-skilled immigrants, as specified in the law, are particularly restrictive in relation to (permanent) immigration (Coentro, 2011). In fact, the only reference that is made to highly qualified people is of temporary nature: either a temporary student visa or a temporary visa for scientists, professors or technicians in service of the Brazilian government.

What should not be left untouched is the case of greater skilled-labor demand in emerging economies. In a 2008 article, Ribeiro and Jacinto (2008, p. 20) already concluded “given the increasing innovation pace and public policy support in Brazil ... the demand for unskilled labor should decline, or at least, stagnate”. At the moment, Brazil is experiencing, as other BRIC countries, a considerable scarcity in qualified human resources (Ruediger et al., 2013). Furthermore, Ruediger et al. (2013) argue:

The attraction of highly skilled immigrants can allow the deficit of proper investment in the past [in education] to be overcome, so that better advantage can be taken of the ‘demographic bonus.’ ... Due to the recent Brazilian resilience to the cycle of global crises which began in 2008, the country has become an increasingly more attractive destination for migrants, which constitutes an unequalled opportunity to attract talents in the international market (2013, n.p.).

An increase in highly-skilled migration in Brazil today can be seen both in the numbers of so-called organizational expatriates, people who go abroad in service of a multinational company, and in so-called self-initiated expatriate, workers who voluntarily decide to live abroad (Araújo et al., 2013). In relation to the need for increased highly-skilled immigrants in Brazil, Araújo et al. (2013) argue that the 2008 crisis presents opportunities to expand business in emerging economies such as Brazil. However, due to structural educational limitations, companies find it difficult to attract and retain skilled employees (Araújo et al., 2013). In sum, many authors acknowledge what highly-skilled migration has to contribute to the further development of Brazil (Coentro, 2011; Patarra, 2012; Ruediger et al., 2013), which is why they advocate for more lenient policies in relation to this specific type of immigration.

As evidenced by the increase in immigration in the country, not only Portuguese, attracting highly-skilled professionals is clearly working. Despite the fact that Brazilian law does not seem particularly open to immigration, some authors argue Brazil has been successful in both attracting back highly-skilled members of its diaspora and highly-skilled non-nationals due to the positive conjuncture (Papademetriou & Sumption, 2013). However, it is clear that more research on this kind of immigration is necessary in order to better understand the processes of North-South migration. This would also help the development of better migration policies in Brazil. To a certain extent the country has proven, by maintaining Law No 6815 in force, among others, that it is not used to the attraction power it now has on highly-skilled migrants worldwide.

In my view, two specific features make the immigration process in Brazil particularly difficult. First, the large number of government institutions involved in regulating migration makes the process

lengthy and bureaucratic. As Coentro (2011, p. 102) explains, six institutions play a role in the management of immigration: the National Immigration Council, the Ministry of Work and Employment, the Ministry of Foreign Affairs, the Ministry of Justice (with the Federal Police), and the National Congress. Secondly, the requirements to hire a foreigner emphasize protection of the national labor force (Araújo et al., 2013; Coentro, 2011). One of the requirements companies interested in hiring a foreigner have to deal with, for instance, demands that at least two thirds of a company's work force should be Brazilian (Araújo Júnior, 2011).

After these brief comments on the legislation that regulates (highly-skilled) migration in Brazil, the following subsection will point out some

In this section some brief comments were made on the legislation that governs that entrance of (highly-skilled) immigrants in Brazil. Due to the nature of this thesis, which, by far, does not focus on legalities surrounding the immigration process, I have chosen not to present the extensive list of requirements in-text. These can, however, be found in the Appendices. The next section will point out some aspects of Portuguese highly-skilled immigration in Brazil.

5.5.1 Profiling the Highly-Skilled Portuguese Immigrant

When studying labor migration from Portugal to Brazil, it is important to take into account that, despite deep cultural, historical, and linguistic linkages, Portuguese immigrants (highly-skilled or not) need a visa to establish residency in Brazil. Nevertheless, the Portuguese received 4,7% of new work permits (temporary and permanent) in Brazil in 2013 (Pires et al., 2014). As mentioned in the qualitative study provided by Finotelli et al. (2013), Portuguese immigrants rarely have a work contract, which is necessary in order to apply for a visa, before migrating to Brazil. This means many immigrants enter the country on a tourist visa, valid for 90 days and extendable for another 90 days (Finotelli et al., 2013). After these initial six months, those who found a (irregular) job with no work contract, often continue into illegality in the country. For obvious reasons no data could be found on the matter of illegality. Furthermore, while I have no hard data to justify this assumption, I believe that due to the large Brazilian immigration in Portugal for the past (pre-crisis) years, a considerable number of marriages, relationships, and Brazilian children (from at least on Brazilian parent) may be used to obtain a visa prior to migration to Brazil. This does not mean, however, that the motive to migrate to Brazil in recent years (with a half-Brazilian family for instance) was not funded on the economic crisis. Brazilian return-migration, as mentioned before, plays a role in this in case the return migrants move back with a new family.

Although Bräuninger and Majowski (2011) emphasize European mobility as a possible solution for or approach to rising unemployment in peripheral countries of the European Union, Portugal included, a number of changes in the characteristics and destinations of Portuguese emigration are important to discern. Three distinct changes stand out as pointed in previous studies: besides an absolute increase in emigration rates, there was a revival in the past years of old destination countries of Portuguese emigration as well as a change in the educational profile of the Portuguese emigrants (Malheiros, 2011; Pires et al., 2014).

First of all, there has again been an increase in emigration from Portugal in the years after the global economic crisis. Table 7 illustrates this absolute increase. Emigration decreased between 2008 and 2010, because the economic crisis was global, and all countries experienced an economic

downturn (Pires et al., 2014). From 2010 on, however, emigration has been steadily increasing, with a relative increase of 57% from its lowest point in 2010 to last year (2013).

Year	Exits
2007	90.000
2008	80.000
2009	75.000
2010	70.000
2011	80.000
2012	95.000
2013	110.000

Table 7 Portuguese emigration 2007-2013

Secondly, as already mentioned, next to a clear accentuation of inter-European migration, the crisis has led to a revival of old Portuguese migration routes, primarily to former colonies (Malheiros, 2011; Pires et al., 2014). There is an enormous difference between the absolute number of Portuguese entries in 2013 in the United Kingdom (30,121), the major destination country for Portuguese emigrants in that year, and in Brazil (2,913). In both countries, however, Portuguese emigration constituted 5% of new immigration (Pires et al., 2014, p. 41). Portuguese emigration to Brazil saw its relative highest increase of 96% in 2011 compared to an increase of 35.3% in the United Kingdom in the same year (the highest increase for the UK was 47.3% in 2013). I would argue that, although the absolute in-flow of Portuguese in the United Kingdom as the new main receiver of Portuguese emigrants cannot be ignored, emigration to Brazil has seen an enormous relative increase, especially given the legal difficulties related to visa and other regularities as opposed to the free circulation within the EU.

Thirdly, as already briefly mentioned above, the level of education of the new Portuguese emigrant has change over the decades. Once characterized by unskilled emigrants (Baganha, 1994), the most recent new Portuguese emigration is better qualified, with an increase of 88% in the number of emigrants with a college degree from the 2000/2001 period until now (Pires et al., 2014, p. 69). In a comparison between the years 2000/01 and 2010/11, Portuguese emigrants with only a basic level of education decreased from 67% to 61%, whereas an increase is observable in secondary education (high school) and college from 23% to 28% and 6% to 10%, respectively (Pires et al., 2014). According to Malheiros (2011), this is a development of both structural changes in the educational levels in Portugal, associated with a rise in unemployment among young, well-qualified people. This is not to say, of course, that unskilled emigration has become dismissible, since more than half of Portuguese emigrants still have only basic levels of education (Pires et al., 2014). Although low-skilled emigrants are still predominant, the shift in comparison to former emigration periods is very clear.

What is also interesting to mention, is that the recent changes in immigration/emigration rates in Portugal have created dynamics unseen to date in a country so strongly formed by emigration. During a period in which Portuguese emigration to Brazil was practically non-existent - Pires et al. (2014, p. 101) speak of a mere 482 entries in 2004 – Brazilian immigration in Portugal experience several peaks of both skilled and unskilled immigrants (Finotelli et al., 2013). Despite the legal difficulties in migrating to Brazil in comparison to inter-European migration, existing ties of different kinds – cultural, linguistic, historical, even the “beaten paths” of previous emigration perhaps of families constituted with Brazilians in Portugal – are suspected to have influenced the continuity of these flows.

What makes migration within the European Union easier for many Portuguese emigrants, besides the geographical proximity to family and home, is fact that no visa is required to circulate and establish residency in another member country. Migrating to Brazil, on the other hand, will by itself require taking care of and engaging in practices to regularize one’s situation. Based on both my personal knowledge and the qualitative study by Finotelli et al. (2013), I argue most Portuguese

emigrants try their luck in Brazil without having any guarantees of finding a job and a subsequent work permit. As Finotelli et al. (2013, p. 234) write, many Portuguese who are willing to work in Brazil enter the country on a tourist visa. Their research group interviewed 24 Portuguese immigrants in three different cities in Brazil and came to the conclusion that 14 out of the 24 interviewees entered on a tourist visa; 10 out of these 14 entered Brazil already with the intention of searching for jobs. Finally, if we take these difficulties in the migration process to Brazil into account, the relatively smaller numbers of Portuguese emigrants does not seem surprising. In fact, I argue the numbers concerning Portuguese immigration might actually be considerably higher if we take into account that many Portuguese eventually tend to spend time in irregular situation in the country³⁷ (Finotelli et al., 2013). Otherwise, the qualitative study by these authors confirms the general trends in relation to the age (average of 31.6 years, which is relatively young) and only 2 out of 24 did not have at least a bachelor's degree. In their conclusion, the authors propose among others a facilitated process for the obtainment of visas, and the recognition of diplomas between both countries. All in all, if the need for a (work) permit is taken into account in the comparison between migration within the EU and migration to Brazil, I argue the increased immigration in Brazil actually very significant, especially as an illustration of increased North-South flows.

³⁷ This does not necessarily mean that people remain in the country completely illegal, but strategies, such as applying a student visa, are quite common (see also Chapter 6 and the general characteristics of my respondents).

6. Findings

It is wise to mention again that the case study in this research does not propose to analyze the entire Lusophone Migration System (LMS). This research should be perceived as an attempt to analyze the current relations between the two “traditional members” of this system, Portugal and Brazil (Baganha, 2009), in the current global context and in the years post-global economic crisis. The focus is on the micro and individual level, with thirteen interviews having been held with fourteen young Portuguese immigrants in Rio de Janeiro. This chapter presents the findings obtained from these interviews. It is subdivided in three sections: General Characteristics, where the general migrants’ characteristics and the impact of the economic crisis in Portugal and their personal existing network in Brazil in the decision to migrate will be set out; in the second section on Mass Cultural Connections between Portugal and Brazil, the focus will be on how and to what extent these cultural ties between both countries have created an image of Brazil and attracted migrants to the former colony; in the third section, Agreements and Regulations, there will be attention to the existing agreements and regulations between both countries and how Portuguese immigrants in Brazil experienced them throughout the migration process – did they in fact facilitate immigration and acceptance in the new country or did migrants expect it to be easier than it was? Although the first section is of general nature, the last two build strongly on the linkages proposed by Fawcett (1989) and explained in Chapter 2 of this thesis.

6.1 General Respondents’ Characteristics

There are a number of aspects that the mass cultural connections and the regulatory linkages that came up out of the interviews should be mentioned. These aspects are largely related to the contexts in which the current flow is taking place, since it takes into account the employment situation in Portugal, the migrants’ network in Brazil, previous international experiences, and whether the immigration is expected to be temporary or permanent. The personal reasons cited to choose Rio de Janeiro, should also be mentioned. Table 8 presents the profile of the respondents.

The respondents varied in many ways: in age, educational formation, city of origin in Portugal, previous international experiences in Brazil or other countries, and amount and quality of the social and professional network in Brazil. Some of them are in Brazil with a work visa, others have a visa through family reunification (Brazilian partner or child), while others are in the country with a student visa. What my respondents have in common is that they are all under 35 years of age, they immigrated after the beginning of the economic crisis in 2008, and they obtained at least a university degree at bachelor’s (BA) level. With the clear exception of LS, who had been married to a Brazilian for more than five years, which facilitated the process of obtaining a visa while still in Portugal, most of my respondents first entered the country on a tourist visa. One was given a contract after her internship at a company in Rio de Janeiro. All others immigrated without any clear job offers.

Respondent (Age)	Education	Employed in Portugal	Previous stay in Brazil	Immigration date	Currently employed	Visa Type
RS (25)	Business Communication (BA)	Yes	None	October 2013	Yes	Work visa in process
BP (27)	Architecture (MA)	No	University exchange	June 2012	Yes	Student visa
LF (23)	Leisure Management and Tourism (BA)	Yes	Holidays	June 2012	Yes	Work visa in process
JP (31)	Civil Engineering (MA) + MBA	No	Holidays	July 2013	Yes	Work visa
IC (26)	Journalism (BA) / Communication and Culture (MA)	No	University exchange, MA research	August 2013	Yes	Work visa
AP (31)	Primary school teacher (BA)	No	Holidays	January 2014	Yes	Family reunification (child)
MR (29)	Architecture (BA) / Urban Planning (MA)	No	Internship	September 2012	No	Family reunification (marriage)
FB (25) & JA (24)	Cinema (BA) & Cultural Management (BA)	No & No	University exchange & None	October 2013	Yes & Yes	Student visa
RC (25)	Architecture (MA)	No	University exchange	February 2013	Yes	Student visa
LS (30)	Archeology (BA)	Yes	Holidays	January 2011	Yes	Family reunification (marriage)
AM (30)	Archeology (BA + specialization)	Yes	None	November 2012	Yes	Family reunification (marriage)
SM (28)	Civil Engineering (MA)	No	Holidays	August 2012	Yes	Work visa
MG (34)	Pharmaceutical Sciences (MA)	No	Internship	January 2010	Yes	Work visa (permanent)

Table 8 Respondents' general characteristics

6.1.1 Economic Crisis

Regarding the employment situation, most of my respondents indicate the economic crisis in Portugal and the current state of the labor market in the country were of great importance in their decision to emigrate. Most of them were unemployed in Portugal and had no perspective of finding a job anytime soon, which is also the reason some migrated after graduating without even looking for a job because of their low expectations. This was the case for BP and RC. Both had already spent time in Rio de Janeiro during an exchange program from university, which meant they knew the city, which, as they argued, facilitated their decision to emigrate. Those who were employed in Portugal indicated they were either not working in their field or in one or another way dissatisfied with their job, but had no hopes at all of finding something more rewarding or fulfilling once they quit. RS explains her despair with her situation in which she was totally dissatisfied with the company for which she was working due to the terrible working conditions. She was, for instance, not insured at work and she had no perspective at all of receiving a raise after more than three years:

I started thinking... If I leave where will I go? Right? What am I going to do? There is no... All my college friends are either working in Continente³⁸, unemployed or abroad. What am I going to do? I started thinking, I'm very organized in these things, so that's when I started thinking, back in 2012... I started thinking in 2012, but in 2013, when all these problems with depressions and even more pressure started... That's when I started identifying, I started organizing, started searching for apartments...

IC and FB both argued they had trouble finding work in Portugal for almost two years. They could only find short-term jobs, but nothing secure for more than two years. For IC, a journalist/singer who fell in love with Rio de Janeiro during her first stay in 2009, this was the main reason to take the risk and try Brazil again:

I was... The first shock was huge, it was difficult to adapt [in 2009 during her six months exchange]. It took two months for the process of falling in love to start, but then when it started... I found my place in the world, you know? It was something... This was my place. ... In Portugal I had precarious jobs, I was very badly paid, I never had an employment contract. ... I started thinking, if this is it then I'd rather be in these conditions in Brazil. I am happier in Rio in the same situation, with the responsibility of having to pay my own bills then I am right now [in Portugal].

In sum, all interviewees argued that the current economic situation in Portugal and the difficulties encountered to either find a job or, in some cases, the lack of opportunities to change jobs was to a certain extent a decisive factor in the decision to emigrate.

6.1.2 International Experiences

Another important factor that can be noticed upon an examination of the respondents' profiles is the relatively high numbers of people who had already visited Brazil – or even Rio de Janeiro more specifically – before emigration. As Kritz and Zlotnik (1992) argue, population exchange within a migration system involve, besides permanent movements, also short-term movements for tourism or educational exchange purposes among others. As the authors argue, this type of movements

³⁸ Continente is a large supermarket chain in Portugal.

can set the conditions for future, more permanent movements, which this research shows has been the case. Furthermore, Bräuninger and Majowski (2011) emphasize both the increasing willingness in the aftermath of the crisis to migrate and the fact that experiences abroad make it more likely for these highly-skilled young to consider a move abroad. With the exception of RS, JA and AM, all my respondents had previous experiences in the countries, either on holidays or during an exchange or internship. In the case of JA and AM, despite the fact that they had previously not been in the country, their partners both had a connection with Brazil. JA's girlfriend spent one year on an exchange in Rio de Janeiro, while AM was married to a Brazilian he met in Portugal (and who was there pursuing her master's degree). In the case of MR and MG, an internship in the country during and after their master's respectively led to a more permanent move to the country. MR met her Brazilian husband in Brazil while doing an internship at the UN in Rio de Janeiro. MG, was offered the opportunity of staying at the company where the interned immediately after finishing her master's through the INOV program³⁹.

In line with my expectations from a country that is traditionally perceived as an emigration country, many of my respondents turned out to have a significant amount of international experiences. Besides those who had experiences in Brazil, as mentioned above, I had respondents who also pursued master's degrees abroad, which is the case of JP (MBA in Prague) and MR (MA in Denmark). Others even had work experience abroad, which is SM's case who studied in Chile, travelled through Latin America and Asia, interned in Cape Verde, and worked in Angola before moving to Brazil. Also, most of the respondents declared having briefly considered other countries (most of them within Europe) before choosing Brazil. This illustrates the participation of Portugal in at least two well-consolidated migration systems, as argued in Chapter 2, the Lusophone and the European Migration System. SM's case is the most striking example of the strength of the Lusophone system, as argued in Chapter 2, because of her clear participation in it. Within two years after graduation, she had had an internship in Cape Verde through the INOV program; found a job in Angola as an expatriate, and had finally decided to move to Rio de Janeiro to look for work. Although she does not argue language was all that important for her migratory trajects, the combination of factors Brazil offers was decisive for her choice, including the language:

It's like, I had to emigrate anyway, so it'd better be a place I really wanted and within Europe [I didn't]... It's more because of the weather, cold, more... I saw my sister who lived in Sweden and I saw what she went through. The country that was more open was Germany, and, honestly, I didn't feel like learning German, because, think about it, in a stage where you just want to start working and start doing everything else, [having to] learn German... That's what it was more about...

Even though to a certain extent SM might not have chosen Lusophone countries intentionally, the existence of contacts, opportunities and connections between Lusophone countries, which is one of the main characteristics of system, ends up generating all kinds of contacts and opportunities in the countries within the it.

³⁹ Several of my interviewees mentioned the program as a possible incentive to emigration by the Portuguese government. They explained the aim of the program to connect (recent) graduates with Portuguese companies abroad by offering internships paid for by the Portuguese government/European Union. The information on the program's website describes it as follows: "Its main aim is to provide quality training to young graduates in an international context and to serve as a link that allows past and current participants to keep in touch and share information between one another through the use of an informal knowledge network and a growing international contact network: the networkcontacto." (From: <http://www.portugalgloba.pt/PT/InovContacto/Paginas/AboutInovContacto.aspx>, accessed September 19, 2014).

6.1.3 Duration of Stay

In regard to the (probable) duration of their immigration (process) in Brazil, I would like to stress the dynamic character of my respondents' experiences as immigrants. They tended to refer to it as a *process*, since most of them indicate not to feel bound to stay in Brazil in any particular way, which has been shown by their previous international experiences and general willingness to move in case of better opportunities elsewhere. This also applied for the respondents that moved with a Brazilian spouse. Most of them indicated to be open for whatever should happen in the future, whether it is remaining in Brazil or moving back to Portugal or even somewhere else. Therefore, they were all very careful in pinning down an "end date" for their experience in Brazil. RS, IC, LS, and AP were more inclined to staying in Brazil for what is probably going to be a somewhat longer timespan than all other interviewees, albeit for different reasons. RS, for instance, feels like it would be a 'waste' (of time and effort) to build a network in Rio de Janeiro and then leave after two or three years. Moreover, she argues she also tried to escape the general 'negativity' that prevails in Portugal due to the current economic situation. LS and AP are both married to Brazilian men and, despite the fact both of them focus on the opportunities Brazil had being offering them and their families, they also believe they would move back to Portugal or somewhere if there were better opportunities (in the case of AP) or if she felt it necessary to move back (LS). However, as they speak about their process of migration, it seems like their move is of a more permanent or long-lasting character. IC emphasized she wants to stay in Rio, responding poetically to my question whether this means staying forever:

But it's ... I came and went back, came and went back, came and went back. And I want to stay here. I don't even think about returning to Portugal. ... But "forever" in the sense of Vinícius de Moraes, right? "Let it be eternal while it lasts", "let it be infinite while it lasts"⁴⁰. But imagine something happens in a year from now and I want to go back to Portugal? I don't know, you never know...

It appears that even those who moved to Brazil with a long-term or possibly even permanent intention are careful when answering questions regarding the expected duration of their personal immigration process in Brazil. Although this research does not allow any kind of comparison in this matter – be it with immigrants from other nationalities in Brazil or with Portuguese immigrants in other countries – I believe this may also be a sign of the Portuguese people's flexibility in respect to migration. As a "country of emigration", Portugal has had people move around the world for centuries. One of my respondents, AM, emphasized this characteristic by arguing that Portugal is responsible for the "invention of globalization" in the 15th century:

If people really want to work within their field they should go for it. Today's world is global. ... The world has been global for more than 500 years now. Since the moment the Portuguese grabbed their caravels and started exploring the world.

Thus, being 'on the move' does not seem like something particularly frightening to my respondents, or at least not enough to bring them to settle down as soon as possible and end their immigrant life.

⁴⁰ The reference being made here is to the last line in De Moraes' famous *Soneto de Fidelidade*, published in his book "Antologia Poética". The last verse in Portuguese: *Eu possa me dizer do amor (que tive): / Que não seja imortal, posto que é chama / Mas que seja infinito enquanto dure.*

6.1.4 Why Rio?

When asked about their decision to move to Rio de Janeiro in particular, most of my respondents argued that the lifestyle in Rio was what attracted them more – and what they expect to attract most of the immigrants in the city as well. With the exception of those who moved with their Brazilian partners originally from the city, even those who did not move because of the city argue that they have started to appreciate it, which was the case for JP and MG for instance. Beaches, the warm climate, and a generally positive attitude towards life were the most often mentioned reasons. IC has a very particular relation to Brazilian music, especially samba, which seems to have played an important role in her personal identification with the city and her decision to migrate on a more permanent basis after a couple of longer stays in the city. In MR's case, she met her husband during an internship at the United Nations in the city, but as she argues, when she decided to emigrate (from Denmark in her case, where she finished her master's), she believed staying in Rio for a longer period would be both fruitful for her career in urban planning and give her the opportunity to contribute with something she cared about by working in the slums (*favelas*) of Rio.

The next two sections of the chapter present the findings in regard to two specific set of linkages with the Lusophone Migration System: Cultural Connections, and Agreements and Regulations between Portugal and Brazil.

6.2 Cultural Connections

As explained in Chapter 2, according to Fawcett (1989) the Mass Cultural Connections between both countries can be subdivided in international media diffusion; societal acceptance of migrants; cultural similarity; and compatibility of value system. These aspects were questioned during the interviews, although not all of them seemed relevant for the case study. The emphasis they aspects were given during the interviews is reflected in the aspects chosen here to address in this analysis: Brazilian media in Portugal and migrant acceptance/relation to immigrants in Brazilian society, as explained in Chapter 3.

6.2.1 Brazilian Media & Culture in Portugal

The presence of Brazilian cultural and media products in Portugal seems to be an important factor in strengthening feelings of proximity and familiarity already present in relation to Brazil due to the historical-linguistic relations. During the interviews for this research, I questioned my respondents thoroughly on the role they asserted to the images of the media in their own decision-making process and that of young highly skilled graduates to choose Brazil as their destination.

Without exception, all my respondents argued that Portuguese people are acquainted with Brazilian cultural mainly through the presence of Brazilian music and soap operas in Portugal. Although not everyone admitted having been particularly influenced by these two cultural products in their decision to migrate, they still acknowledged the importance of these media products in Portugal. Some admitted they had actually been strongly influenced by the soap operas. FB, who has a BA in Cinematography, pointed out that she really put her mind to doing an exchange in Rio because of the soap operas she grew up with. RS even points out that *novelas* were crucial for her first information on and image of Brazil:

My background on Brazil was what I think every Portuguese (person) has, which is that of the soap operas. I was a born consumer of soap operas, but I have also always been very realistic. I knew more or less what was going on, and when I started thinking about coming to Brazil, I started researching a lot.

The word “fascination” came up during some interviews when people were questioned what attracts people to Brazil. SM and IC pointed out there is a certain fascination with Brazil, which does not only for the Portuguese. From the perspective of the Portuguese, IC argues this fascination is even greater, because it is a tropical country that speaks the same language. This ‘fascinating’ idea people have about Brazil is, according to MR, built on the seductive and idyllic imaginary the country sells in Portugal:

I think it seduces. The image we have is very seductive. Who doesn't want to get out of work, take off their shoes and stand in the sand?

My respondents also confirmed that the presence of Brazilian music in Portugal is of crucial importance for the cultural proximity of both countries. Although some seem to have been more influenced by music than others throughout their lives or in their families (especially RS, IC, and LS), most of them indicate music also shapes the image of Brazil and that they appreciate some kind of Brazilian music. IC made explicit reference to the influence of the latest wave of Brazilian immigrants in spreading more popular kinds of music in Portugal, as also mentioned in Chapter 3.

Interestingly, male respondents referred more frequently to the idea of violence and criminality that is showcased in Portugal through the media (news and newspapers) than female respondents. They were generally also the ones who distanced themselves most from soap operas and their impact in their image of Brazil and subsequent decision to emigrate. According to my (male) interviewees, the idea people have in Portugal is that there are “robberies, murders, and misfortune” (JA) in every corner and that that is what the media sells about Brazil. AM also pointed out that friends who had been in Rio de Janeiro used to emphasize the general insecurity felt in the city. After having lived in the suburbs of the city, however, he stresses that he never felt really unsafe in the city. According to my respondents, however, the change of perspective once in the country demystifies to a certain extent the idea that is stressed through the media of violence. However, it is interesting to point out that their pre-migration perception of the media in regard to security and safety does not strike with what Sousa (2002) argues is the general positive trend in the Portuguese media (see also Chapter 3).

Another aspect that frequently came up during the interviews is that of the “touristic image” of Brazil. According to some of my respondents, although Brazilian cultural products shape the idea people have of the country in Portugal, this idea is not one of economic opportunities or even a possible labor migration destination. Ana, for instance, emphasized quite a few times that people think of Brazil as a holiday destination. This perspective is stressed by AM and MR, MR argues:

I think the media manipulates the idea we have about the country. Most people want... When I tell them I am in Rio they think I'm here on holidays. Because no one really knows, no one thinks there is much work getting done here. We always have that idea that it is a good place to go on holidays. And that is a lie, because they [Brazilians] work.

In sum, my respondents believed Brazilian cultural and media products have great influence in what the Portuguese think, know, and expect from Brazil and Brazilians.

6.2.2 Migrant Acceptance

An aspect highlighted in Fawcett's (1989) table is the level of migrant acceptance. This specific aspect can be found at the intersection of the Mass Cultural Connections and the Regulatory Linkages (see table 3). Fawcett (1989) explains this intersection by arguing that these "societal norms" that govern, among others, the level of community acceptance of migrants can be very powerful in constraining or inducing immigration. If high levels of prejudice are found towards immigrants, the "inflows" are likely to diminish, whereas complete acceptance on the other side is likely to encourage immigration (or perhaps even the rise of migrant recruitment agencies).

This particular aspect of the experience as an immigrant in Brazil was thoroughly questioned during my interviews. Besides asking more generally how they felt welcomed in the country, I also focused on a couple of specific situations or topics from which I expected they would be symbolic for the level of acceptance, such as the jokes about Portuguese people or how the Portuguese are referred to (for instance, whether they are considered to be "gringos").

The great majority of the respondents argued they felt welcomed in the country. In Rio de Janeiro more specifically, they felt like people were open and tended to incorporate newcomers in their circle of friends. However, there seemed to be some cultural differences between what they expected as Portuguese and the way in which *cariocas* (people born in Rio de Janeiro) dealt with people, arguing they sometimes tended to pay lip service to inviting people. When asked if they believed Brazilian society is open to foreigners, however, some of my respondents stressed that it is open for tourism and tourists, but not always to immigrants. RS, for instance, argues:

I think they [Brazil] close themselves up a little sometimes. The country's protectionist policy in relation to immigration, I find it ridiculous. And Brazilians themselves for that matter, I think they don't discriminate gringos because they think all gringos have money ... That's why they don't discriminate, but a poor gringo would be unconceivable, I think.

What most of my respondents emphasize is that Brazilian society is open for Europeans in general (possibly mainly because they are assumed to be rich as RS argued). There seem to be some 'preferences' within European nationalities, such as Italians and French, as RS and IC told me. In relation to their acceptance of the Portuguese, the accounts differed considerably. No one of my respondents reported feeling discriminated on a regular basis at work or in their personal life, although some did stress that the Portuguese are treated differently from other Europeans. In general, my respondents tended to agree that Portuguese are not the typical *gringo*: they are "Portugas", "brothers" (*irmãos*), or "Portuguese gringos". They are less or a different kind of gringo. As FB argues jokingly when I questioned her about this:

*That's a good question ... But we Portuguese say the others are gringos and we're not, right? ... It depends on the relation with the Brazilian. If it's a good relation he already considers you *carioca* [Brazilian]. It's a good question, I for all don't feel gringa.*

During a different question on whether she thought it is easier for Portuguese people than for

those with other nationalities to obtain a visa, SM stresses the difference between Portuguese and “other” by literally referring to other nationalities as foreigners despite the fact that she is also an immigrant:

I think the only thing that makes it harder for foreigners than for us [Portuguese] is that they have to translate the official documents.

When I asked LF whether she felt like the Portuguese were more easily accepted than others, she emphasized the shared language and customs, and the fact that the Portuguese immigrants hold a lot of respect for Brazilian culture, essentially because they do not see it merely as a country to spend holidays. She finalizes with the following statement:

[Brazil] might seem differently, but we, this is a place we conquered, it's ours, it's the same language, we really understand our Brazilians, I mean Brazilians. And it seems like we have a little more respect than other nationalities, so they really like that.

The examples presented above illustrate how Portuguese immigrants themselves, be it explicitly or implicitly, do not feel like *gringos* in Brazil. LF's statement in fact illustrates the proximity the Portuguese feel to the country and how they relate to Brazil, still basing themselves in the colonial past. IC and AP argue the shared language facilitates the process of acculturation and of finding a job, respectively, while others stress the proximity felt by Brazilian to Portuguese immigrants, which they attempt to show by telling family stories about Portuguese ancestors (very often grandparents, especially in Rio as some respondents argued). Interestingly, AP was the only respondent who indicated she felt discriminated because of her accent when she started looking for jobs in 2012. It is interesting to notice here that she already had a visa based on her Brazilian daughter, thus she did not need to go through the tedious and long process of obtaining a visa (see section 6.3). She blames this difficulty, however, on the fact that she works with primary education, which means small children need to be able to understand her. Many schools she approached explicitly stressed that they could not hire her to work with young children because children (and parents) might have trouble with it. It seemed like, to a certain extent, she understood the discrimination practised. RS, on the other hand, feels like being Portuguese creates a contrast when attending job interviews, despite the fact that it is difficult to find a company willing to start the procedure of obtaining a visa.

When it comes down to jokes about the Portuguese, there were two main ‘camps’ in the way chosen to deal with it: some of the interviewees indicated not to feel bothered by the jokes at all, while others reported to feel annoyed, especially because the jokes never seem to grow old. The former group of respondents generally just smiled or slightly laughed at the jokes, while the latter tended to deal with it by making explicit that they did not enjoy been told that kind of jokes. However, even those who did not feel at ease being told jokes that focused on calling Portuguese people dumb, unclean or rude, did not take the jokes personally. Some of the respondents argued Brazilian immigrants in Portugal are also victims of jokes based on their nationality, and these jokes are often even more rude and discriminatory (although there was no consensus here, since many also believed there were no jokes about Brazilians in Portugal). Jokes related to the era of colonialism are also fairly common. These comments very often touched upon the gold that was stolen, the indians that were killed, and blamed the Portuguese for everything that is “wrong” with Brazil today. LS and SM both

argued they did not really reply to this kind of comment, essentially because they were true, which, I believe, illustrates a kind of awareness to the 'misconducts' of colonialism.

6.3 Regulatory Linkages

The focus of this section will be on the experiences of my respondents with the Brazilian labor market. Following Fawcett's (1989) aspects of regulatory linkages, I analyzed my respondents' perspectives in relation to immigration policies in Brazil; rules and regulations governing migration; and employment contract with migrant workers. Although Fawcett (1989) does not mention this particular aspect, I also questioned my respondents on the legalization and recognition of their diplomas. Again, the proposed aspects by Fawcett (1989) will be dealt with more loosely in two subsections: regulations in relation to labor migration, and the acceptance of (Portuguese) labor migrants.

6.3.1 Regulating Labor Migration

The great majority of my respondents found the process of immigrating to Brazil extremely complicated. First of all, because of the difficulties in finding a company that is willing to offer an employment contract, the main requirement to apply for a work visa. Several reasons were mentioned in regard to why it was so difficult to obtain a contract. Many pointed out the protectionist nature of Brazilian (labor) law, such as SM and AM, as they both emphasized that Brazilian society is afraid of foreigners supposedly occupying spots in the labor market that could be filled up with Brazilians. When I asked Artur if his college friends were able to continue working with archeology after leaving Portugal, he responded by emphasizing precisely this:

Very few. Those who emigrated to Brazil came because... Here in Brazil there is a lot of archeological work [to be done]. Really a lot. However, there's a blockade in relation to any kind of Portuguese immigrant⁴¹. Why? You can only enter with a work visa, however you can only get an employment contract if you have a permanent visa, which means you will not get it, see? A company is only going to give you an employment contract if you have a permanent visa. And basically, you will only get a permanent visa if you marry a Brazilian.

This protectionist character is best illustrated by the "quota" used in order to regulate and limit the number of foreigners in Brazilian companies: for each foreigner that is hired, a company should employ at least two Brazilians, which was also already briefly mentioned in Chapter 3 (Santino, n.d.). LF, JA and FB mentioned this particular point very explicitly during the interviews.

Marta explicitly pointed out that the process of obtaining a work visa is long, bureaucratic, and expensive. It puts pressure on companies to be responsible for their foreign personnel to a greater extent than is the case with nationals. RS argues:

As company, you pay for a work visa or... When you ask for a work visa for an employee you have to ensure, you have to ensure that you will give him a job, right? So, you give him a job and you have to insure that ... You have to be responsible for the person's health while he's in the country with an

41 More on the regulations for Portuguese that came up during the interviews will be explained in the next section. However, I would like to point out that both AM and LF made some interesting comments when I asked whether they thought it was easier for Portuguese to immigrate to Brazil: although they believed this should be the case due to the ties between both countries, they felt like sometimes it was actually harder for the Portuguese.

employment contract linking him to your company. ... That also weighs in the decision to employ a foreign worker.

LF points out the issuing of the visa takes extremely long. She entered and stayed in the country for six months as a tourist, but found work and applied for a visa. However, it took so long for the work visa to be issued, that she was actually illegal in the country for a while. LF and MG also pointed out that the work visa is linked to a work contract, usually for a two years period, which means in case the immigrant worker changes jobs, the process of obtaining a visa should be reinstituted. After two contracts of two years (summing up four years on a work contract), foreign workers can apply for a permanent visa. If a new process is opened because of a change of jobs, however, the previous years in the country do not count for the permanent visa.

Nearly all of my respondents, with the exception of those married to Brazilian citizens, indicate they entered the country on a tourist visa. Some found a job with a factual employment contract and, consequently, obtained a work visa. On the process of finding a job, LF emphasizes that despite her two-year long research as preparation for her emigration while still in Portugal, she only found a job once in Rio:

So, for two years I researched a lot and my responses were almost zero [to the resums she sent out]. When I got here, I started making contacts and getting to know people and from then on I started been mentioned to various companies and that's how I got in. Here in Rio, no actually in Brazil, everyone starts working through contacts⁴².

What was articulated by LF in relation to finding work in Brazil applies to almost all my respondents' search for work in the country (those without Brazilian spouses), with JP, MG, and LS as the only exceptions. From these three cases, JP's is the most peculiar case. Although he did not indicate to have particularly strong contacts in the country, he argued one contact in Portugal arranged an interview in Brazil while he was still in Portugal:

I had contacts, I had some contacts [in Brazil]. But I didn't have personal contacts. I had a couple of people that I knew that knew some people here. ... I came here with a job practically arranged, we just needed to formalize it. ... But I came here because the company where I am working now needed engineers and this was through a contact of a friend of mine who knew someone. So it was through someone.

JP found the whole process of obtaining a visa quite easy. He started working immediately (so on a tourist visa) and after three months traveled to Portugal to get his work visa⁴³. During the interview JP seemed fairly confident about his skills and competencies for the work he was doing, which was, according to him, the reason why there would have been no reason to have a more complicated process of obtaining the visa. MG's case was slightly different because she stayed in the company she had done an internship, so in fact she entered the country on a student/internship visa instead of a visa for touristic purposes. LS on the other hand, since she has been married to a Brazilian for a long time, was able to arrange her permanent visa while still in Portugal and also found work through

⁴² The term she mentions jokingly in this part is the in Brazil well-known QI, meaning *Quem Indica* (meaning literally 'Who Indicates'). The term makes reference to 'IQ' (QI in Portuguese) and the underlying message is that the people you know rather than your IQ is what is going to land you a job. It reinforces the power of networking in Brazil. Many people explained during the interviews that being in Brazil is the only way you can find a job in the country, because nothing works via the 'traditional' ways.

⁴³ Another bureaucracy that requires that all visa have to be collected at a Brazilian consulate abroad, even when the foreigner is already in Brazil. This was mentioned very often in the interviews as something "stupid" (Inês).

the internet before arriving in Brazil. It is interesting to question, however, whether this would have been the case if she did not have the right to a permanent visa (see AM's first quote in this section).

Some of the respondents found work while on a tourist visa, but were unable to obtain an employment contract. In some cases the possibility of a contract was not even discussed with the hiring company (JA, RC and BP). According to my respondents, the possibility of discussing an employment contract depends to a great extent on the field of work of the immigrant. Within the field of architecture, both RC and BP indicate not even Brazilians work on contract. JA works only with his boss in the area of cultural production, which makes it impossible for him to try a visa because the (small) company would have to have at least another Brazilian working there (see above 'quota' on the number of foreigners employed). The strategy chosen by all the respondents that did not have access to either a work visa or a visa based on family reunion was to enrol as a student in a university. However, those who find themselves in the situation of working on a tourist visa are, in fact, working illegally in the country, since students are not allowed to work (Coentro, 2011).

6.3.2 Acceptance of Labor Migrants: the Portuguese Experience

In the previous subsection, an analysis was presented based on the experiences of my respondents in relation to finding work and a subsequent work visa. Those who were not able to find regular work with an employment contract had to look for other strategies in order to regularize (at least to a certain extent) their situation in Brazil. From what the interviews show, the most commonly practiced strategy is a student visa, which in fact, does not regularize the situation completely, since this study and the interviews conducted are an example of *labor* migration and foreigners on a student visa are not allowed to work in Brazil. In the context of this thesis, I would like to highlight two aspects that were mentioned in the interviews and which are of interest for this thesis. The first one is related to the opposite opinions on the protectionist legislation of the Brazilian labor market. While on the one hand quite a few of my respondents were themselves harmed by the complex rules and regulations surrounding the process of labor migration in Brazil, a significant share of them indicated they understood the *need* for such protectionist legislation of the labor market, particularly in the current economic conjuncture with Brazil gaining power and attention internationally. As RC argues:

I think we have to think a little bit from their perspective. We have to think about the protection they have to offer... Otherwise they [companies] will start looking for foreign employees that might have better education, maybe they are even cheaper and they would start filling⁴⁴ companies with Portuguese and foreigners⁴⁵, and Brazilians would become jobless. That doesn't make sense. ... I think it's good to have this protection of the internal market.

FB and JA attribute the close labor market to the current international interest to the mega-events:

[FB] There are increasingly more people [coming to Brazil], Brazil is trendy. Within this period from the World Cup until the Olympics, Brazil will be trendy. It's going to bring a lot of people and a lot of money. And in a way they have to control it, right? Because there are also many Brazilians and if they don't control it... [JA] It's a lot of people, a lot of people from other countries, right? They come

44 The world actually used here translates to "clogging".

45 Once again, a respondent distinguishes between a Portuguese and a foreigner.

looking for work in Brazil, especially now.

Interestingly, those who defended the policies used to regulate migration in Brazil are mainly those who did not find a regular job and who are living and working on student visas. To a certain extent I would argue this appears to be a ('psychological') strategy to justify their own legal situation in the country: instead of criticizing the policies at place in Brazil, they opt to defend them. Other respondents, however, saw the world as 'global' and had a much broader and encompassing view of the world. RS, for instance, literally expresses her feeling about immigration when I asked her if qualified immigrants have something to contribute to Brazil⁴⁶:

I am completely in favor of foreigners [immigrants], in fact, I was already completely in favor of foreigners in Portugal, because I think it's like this, the world... It has to be global and I think today that is increasingly the case. Travelling is cheaper... Well, I think it's really, really nice to have the opportunity, because who knows what kind of luggage a foreigner is going to bring ... In sum, I think this exchange is very important, but the Brazilian laws don't facilitate it at all.

The second major aspect that arose from the interviews, is the perspective of most interviewees that the Portuguese should be treated differently in Brazil. In relation to their supposed 'right' to emigrate to Brazil because of being Portuguese, most respondents believed that it should be easier to settle in the country and that this should go further than merely the linguistic ease clearly present. As MG argues, "diplomacy could have reached a point where there would be some ease". As one of the only respondents who made a case for stronger diplomatic ties in the sense of facilitated migration process, MG believes been integrated in the European Union makes it more difficult to have separate agreements with other countries:

I don't know how that could be [arranged], that special treatment for Portuguese.

In one way or the other, all my respondents emphasized along the interview that migrating to Brazil should be legally easier because both countries are "brothers"⁴⁷. Not only did my interviewees believe Brazil would have a lot to gain from highly-skilled immigrants, they thought it would be more than expected or normal if Portuguese had their way-in facilitated based on the existing ties (historical, cultural, linguistic). Generally speaking, I would ask in the first half of the interview whether the respondent thought the idea of "brother countries" was still vivid among Portuguese and Brazilians, while in the second half I would focus on whether they had expected it to be easier for a Portuguese to move to Brazil (culturally, but also legally and in relation to the labor market). With the exception of AP, even those who believed people in both countries did not feel connected in a "familiar" way, would at one point either use or mention the idea of "brothers". For example, FB and JA answered negatively when I asked them whether the idea is propagated in Portugal that Brazil is still a "brother". They argued did not feel there was any kind of proximity in that way on either side. However, later on FB argues everything would be different if taken into account this familiarity:

⁴⁶ This perspective is in line with what the International Organization for Migration (IOM, 2013a) on the contributions migrants bring to their new societies. In fact, under "Moving Stories", Pablo's story is similar to what is studied in this thesis: he moved from Spain to Buenos Aires to work (North-South migration flow: <http://www.migrantscontribute.com/#/moving-stories/pablo>).

⁴⁷ Within the idea of Lusofonia, as explained in Chapter 4, Lusophone countries are supposedly "brothers" (países irmãos), although it seems like this perspective is actually more strongly sustained and emphasized by Portugal in relation to its former colonies than the other way round.

[Interviewer] Do you think there is a distinction between Portuguese and other foreigners? Is there a certain ease for Portuguese to get a visa, a job or anything else? [Filipa] I don't think so. If that was the case, I think it is stupid since we are a brother country like they would say, in relation to work and student visa everything would be easier. Or at least different from other European countries, since we are supposedly a brother country, we could have a permanent visa or a temporary visa that would justify that we have money to be here or that we are working. Everything would be easier for Portugal than for other countries, right? Nowadays, it is easier to enter Portugal as a Brazilian than it is for Portuguese to come here⁴⁸.

During the interviews, this kind of statements emphasizing the relationship between both countries and how much easier Portuguese immigrants thought it should be given the relations between both countries was quite common. In fact, most of the respondents argued the general idea in Portugal is that of *brother countries*. According to RC, the idea is still very active in people's minds, although this has not brought any kind of particular 'facilitation' in the migration process. AM also acknowledges his expectations in regard to the ease for Portuguese to regularize their situation in Brazil were false. He argues the reciprocity that is often discussed between both countries in a wide range of topics is not "that reciprocal" by giving the example of the different rules that apply in order to acquire Brazilian/Portuguese nationality through marriage to a national. According to him, he needs at least five years of marriage to a Brazilian national, while his wife can apply for a Portuguese nationality after two years.

IC believes that, *by law*, it should be easier for Portuguese people to settle in Brazil. She mentions the Porto Seguro Treaty⁴⁹ (Tratado de Porto Seguro) from 2001 and argues that one of the objectives of the treaty was to facilitate migration flows between both countries. This is, however, a rather short-sighted view of the treaty, since it does not state any kind of agreement in relation to immigration (it does, however, stress the visa exemption for tourism of 90 days, extendable for another 90 days for citizens of both parts).

Although the general idea exists that it should be easier for Portuguese people, the treaties that were discussed in Chapter 3 were seldom mentioned. The idea seems to be strongly based on the language (mentioned by nearly everyone), the historical connections, and the idea that up until a couple of decades ago it was slightly easier to immigrate, as evidenced by the last large wave of Portuguese immigrants in the 50s and early 60s (Levy, 1974). FB and JA actually argued the idea that it is easy for the Portuguese to migrate to Brazil is still based on stories from people who migrated already decades ago. Two other motives that seemed to give reason for my respondents to argue the process of immigration should be easier were the existing family connections, a consequence of previous migration flows between both countries, and the positive economic situation of Brazil for the past years. It was commonly argued that Brazil can and should profit from the knowledge Portuguese, and immigrants from 'the North' in general, can bring to the country. However, most of my respondents felt like this was only valued by companies and not Brazilians 'on the streets'. MR argued those people with better (higher) levels of education with whom she speaks acknowledge this beneficial position Brazil is experiencing, since it can profit from know-how and skills paid for abroad. In general, the respondents had expected it to be easier to find 'on-contract' jobs and to

⁴⁸ Assuming that it is easier for Brazilians to settle in Portugal was something that turned up many times during the interview. I will not go any deeper into it in this analysis due to the fact that I want to focus on the migrants' experiences in Portugal.

⁴⁹ The Porto Seguro Treaty is a more popular name to the Treaty of Friendship, Cooperation and Consultation dealt with in Chapter 5.

apply and obtain a visa, especially because they are Portuguese.

6.4 Analysis summary

This chapter presented the analysis of the conducted interviews during the fieldwork for this master's research. Before continuing on to the conclusion of this research, where the research question will also be answered, this subsection proposes a brief summary of the analysis presented above.

Regarding the general characteristics of the immigrants pointed out in the first section of this chapter, the highly-skilled immigrants interviewed for this study report having been heavily influenced by the economic situation in Portugal. They were either unemployed or were dissatisfied in the position they were in, but experienced a severe lack of labor mobility within the Portuguese labor market. Most of them had already had international experiences either for studies or work abroad. Of these, a considerable number of them had already been in Brazil. The expected duration of stay was quite 'open-ended', since they felt hesitant in pointing out a specific amount of time they expected their migration process to last. Rio was the chosen city for most of them because of the lifestyle it offers. Some emphasized the music, other the weather and the beaches. The respondents who were married to Brazilian from the city argued the spouse's family in the area also played a role in deciding where to move to.

When questioned about the impact of Brazilian media products on the image of Brazil in Portugal, my respondents stressed the "fascination" people have with Brazil. They argued this fascination might be stronger for Portuguese because of the proximity (linguistic proximity was the most frequently mentioned), but that Brazil was attractive to basically everyone. They emphasize the lifestyle and the beautiful landscapes that attract people to Rio de Janeiro, and argue once in the country the idea of violence and criminality that is spread through the news also seems to weaken. Nevertheless, despite the strong interest and attraction, some argue Brazil (and I believe Rio was more specifically meant in these comments) is not perceived as a country where work gets done. As JP and RC argue, the idea about Rio de Janeiro more specifically is not that of a city to go to for work, but rather to combine some work with a pleasant lifestyle. This lifestyle, referred to by RC as "living standard" in the perspective of young people, is associated with the beaches, the weather, and the nightlife the city has to offer. As RC puts it, Portuguese people more easily blend in because they are immersed in Brazilian culture all their lives, even before visiting the country.

Most of the respondents tended to make a distinction between the level of acceptance coming from personal contacts of theirs and from strangers, be it institutions or even possible employers. In their personal life, they felt the people with whom they dealt more often, such as friends or their spouse's family for those married, were very receptive and accepting of them. The respondents emphasized that the Portuguese are often treated as a 'different kind of *gringo*' by Brazilians, especially when in more close contact. They also referred to other immigrant groups as 'estrangeiros', making themselves the distinction between foreigners and the Portuguese in their discourse. On a more 'distant' level, however, they felt treated differently. MR, for instance, felt mistreated at the Federal Police when the officers made jokes and comments based on the colonial history and the fact that "another Portuguese was coming here". There were very few accounts of this kind of treatment, however, and it clearly does not weigh heavier than the positive ones.

Overall, the process of finding regular work (in this case meaning work on the basis of an employment contract which might lead to a work visa, although this is analyzed by a different Ministry) seems to be quite difficult because many companies find the process expensive, complicated and lengthy. Also, in Brazilian legislation there are quite a few requirements that companies and foreigners must meet. To a certain extent my respondents seemed well aware of the fact that these protectionist rules apply to them, although many argued it should be easier for Portuguese. In regard to finding a job and obtaining a work visa, the interviewees had expected it to be easier mainly because of their nationality. Although they feel well received by society, the legal regulations are more and tighter than what they had expected in advance. However, most of them did not concretely mention specific agreements between both countries, such as the Equality Statute mentioned in Chapter 5. When asked why it should be easier for Portuguese people, it often came down to the shared history and language, the existing family ties (which were brought about by previous migration flows), and the current need in Brazil for high-skilled immigrants. In sum, my respondents all indicate they feel welcomed in Brazil, though they believe the country is very protectionist regarding its labor market and is not open to labor migrants (even when they have something to contribute, as is their case as highly-skilled migrants).

7. Conclusion

The objective of this master's thesis was to approach recent highly-skilled Portuguese immigration in Brazil as a case study of increased North-South flows that have been acknowledged by several organizations. From the theoretical perspective chosen to approach this case study, it is fundamentally necessary to take both historical-cultural and regulatory linkages into account, which has been done extensively in Chapters 4 and 5. The research question I will now attempt to answer reads:

To what extent does recent young, highly-skilled Portuguese migration to Brazil transform historical asymmetrical relations between former colonial metropolis and former colony in the 21st century from an everyday life perspective?

A number of aspects that have been dealt with in the previous sections should be summarized here in order to achieve an answer to this question. Based on my literature reviews and the interviews conducted in Brazil for this thesis, I argue the new generation of Portuguese feels even more connected to Brazil than previous ones. While previous generations based their connection to Brazil much more on family members that had emigrated or other historical aspects, the personal and individual relation between Portuguese and Brazilians now goes beyond historical-linguistic ties. It has at its foundation also the changes brought about by increased interconnectedness. While today's generation has been raised with Brazilian music, soap operas, and the presence of a large group of Brazilian immigrants in Portugal, migrating themselves to Brazil has proven to be more difficult now than a couple of decades ago. My respondents indicated their willingness to migrate to Brazil (instead of to another European country, legally an easier option) as based on aspects such as the language, the climate, and the lifestyle, although they also emphasized their previous knowledge and expectations of Brazil and Brazilians based on the media.

Based on this previous familiarity with Brazilian culture, and on the 'emergence' of Brazil in the world economy and the demand for high-skilled labor that this has generated, my respondents also stressed innumerable times and in different ways that they expected it to be easier for them as Portuguese (thus not the immigration of any other nationality *per se*, regardless of the labor demand), because of the existing ties. Some even indicated to agree with the protectionist rules in place that have the intention of protecting the national labor market, however, for them as highly-skilled Portuguese who have something to contribute to the country, the process of immigration should be easier. The expectations that it should be easier for the Portuguese to migrate to Brazil (thus the regulatory linkages) seem to be based mainly on the fact that these immigrants are Portuguese and they are highly-skilled, thus their nationality and the educational background. However, as was explained in this thesis, there are no longer rules or regulations in place that facilitate the establishment of residency in Brazil for the Portuguese. Moreover, the Brazilian legislation does not explicitly discern between highly-skilled and low-skilled (or unskilled) labor migration, at least not with the intention of facilitating the former.

While moving towards providing an answer to the proposed research question, I want to make the point that the expectations of young highly-skilled Portuguese immigrants in Brazil that it should be easier for them than for other nationalities to settle in the country because of their nationality and

educational background go beyond the existing historical, cultural, and linguistic linkages in place. These expectations are, in fact, based on the perspective the Portuguese hold of the world as it is reinforced by the country's Lusophone imaginary as a country of sailors and emigrants. Without attempting to debunk the importance of a shared history, language, or even the role of the economic crisis in the decision-making process, the way the Portuguese feel connected and related to Brazil goes beyond these mutual ties and what I suspect most Brazilians could feel towards Portugal. It can perhaps be seen as a vivid reproduction of the idea of Lusofonia, one that constantly refers to the shared past – not in pejorative terms or even by disagreeing with the negative consequences and effects of colonialism in the country (*au contraire!*), but in a caring way – as if the young immigrants themselves had known the more successful decades of the Portuguese Empire in the 16th and 17th centuries. Together, this Portuguese imaginary and the presence of Brazilian cultural products and increased Brazilian immigration in Portugal, makes the Portuguese relate to Brazil as if it were just part of their own world, their own imaginary. This is illustrated in the fact that my respondents do not refer to themselves as *gringos* – they feel much closer to Brazil and Brazilians than any other nationality could probably ever feel, as was often argued.

I argue that the current flow of Portuguese emigration to Brazil has transformed the everyday life experience of the Luso-Brazilian relation for these immigrants. Historically, Portuguese immigration in Brazil has been facilitated by a number of factors. Until 1822, when Brazil became independent, the asymmetrical relation between colonial metropolis (Portugal) and colony (Brazil) migration between both regions was basically an internal affair. After independence, a severe labor demand in Brazil stimulated European migration, during which period the Portuguese remained the largest immigrant group. Until World War II, Brazil was clearly a country of immigration. The first attempts at regulating immigration in Brazil, in the 1940s, partly coincided with the first Luso-Brazilian negotiations and agreements in the 1950s, which guaranteed some kind of reciprocal privileged position for Portuguese in Brazil and Brazilians in Portugal. Interestingly, this period in history saw very little exchange of people between both countries. The flows were only revived in the 1980s, when for the first time the flow consisted of Brazilians moving towards Portugal. Diplomatic frictions around the beginning of the 1990s, after Portuguese accession to the European Union in the mid-1980s, led to setbacks in the existing agreements. For the first time in the countries' shared history, immigration between them was not facilitated in any legal way. At this point, as Portugal was experiencing a positive migration rate and turning its attention towards Europe, the diplomatic transformations did not seem to affect many Portuguese emigrants.

The 2008 global economic crisis hit Europe in general and peripheral countries such as Portugal in particular, harder than it did Brazil and other emerging economies. This new international context revived the emigration flows from Portugal, which are so characterizing for the country's identity. In this current conjuncture, Brazil has once again appeared as a destination country for Portuguese. The young highly-skilled immigrants in Brazil today experience in their everyday life the developments in the Luso-Brazilian relation that took place during the past two decades. The diplomatic transformations affect their personal migratory process in that it goes against the expectations that are based on the cultural and historical linkages. In sum, the young Portuguese emigrating now are the ones who are dealing with the disadvantages of the setback in the reciprocal Luso-Brazilian relations. The fact that they feel more connected to and are more familiar with Brazil than previous emigrants due to the Brazilian presence in Portugal makes the process in a way even more tangible.

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Appendix A – Interview Guide I

Global culture & Global labor:

- Conhecimento prévio do Brasil antes de emigrar e a influência da mídia nesse conhecimento (tanto portuguesa quanto a brasileira no sentido de produtos culturais como música, novelas, filmes)
- Até que ponto a mídia em Portugal ajuda a construir um certo imaginário do Brasil? -> até que ponto influencia (indiretamente) a decisão de emigrar?
- Você foi encorajada a emigrar para o Brasil por familiares e amigos? Quais foram as suas dúvidas e as deles? Relação com a cultura brasileira ou o mercado de trabalho?
- Muitos dos seus amigos de faculdade pensavam em emigrar? O Brasil como destino era popular entre eles?
- Existência de contatos pessoais e profissionais antes de emigrar -> foram realmente de ajuda (ou até mesmo determinantes) na decisão? E na integração e instalação no país/encontrar emprego?
- Se considera aceita profissionalmente? Dentro da sua profissão estaria ao mesmo nível em Portugal ou na Europa?
- Aceitação das “skills & expertise” em comparação com os brasileiros. Acredita que tem as mesmas oportunidades que um brasileiro na sua empresa ou até no mercado de trabalho?

Laws and regulations / regulatory linkages MSA:

- Sabe de políticas que facilitam (ou dificultam) a imigração portuguesa hoje no Brasil?
- Complementariedade crise em PT / crescimento no BR. Situação no Brasil ajuda: Copa, JO, etc.?
- Você já tinha um emprego em vista ou um visto de trabalho quando deixou Portugal? Ou saiu com visto de turista?
- Foi difícil trocar o visto de turista? Como é a sua situação legal hoje?
- Experiências pessoais em relação ao pedido de visto: mais fácil ou mais difícil que esperado? Demorado?
- Teve problemas com companhias por causa da necessidade de visto e/ou a burocracia que isso traz?
- Conhece o Estatuto de Igualdade entre Portugal e Brasil? Tem experiência com o estatuto ou sabe de alguém que tenha? Pretende vir a fazer uso do estatuto?

Mass culture connections MSA (compatibility of value systems):

- Já se sentiu discriminado no Brasil por amigos, colegas ou conhecidos? -> língua/sotaque, etnia, nacionalidade?

Lida muitas vezes com piadas de portugueses ou de Portugal? -> baseadas em que: sotaque/colonialismo?

Como tenta lidar com esses comentários ou piadas?

Acredita que a sociedade brasileira está aberta para e recebe bem imigrantes hoje em dia?

Acha que o nível de aceitação é igual para portugueses e outros imigrantes? -> melhor ou pior?

Acredita que sua cultura portuguesa (identidade, língua, valores) ajuda (ou atrapalha) na integração dentro da sociedade brasileira? Os brasileiros enfatizam as similaridades ou as diferenças?

Grupo de amigos: brasileiros, portugueses ou internacionais (maioria)?

Acha difícil integrar com (grupos) brasileiros? Acha que isso deve ser mais fácil ou mais difícil para outras nacionalidades?

Future expectations

Até que ponto sua experiência de hoje é compatível com as expectativas que tinha do Brasil (culturalmente, profissionalmente, com relação às leis)?

Expectativas de morar no Brasil hoje -> pretende regressar a Portugal? Onde acredita que se desenvolveria melhor profissionalmente?

Appendix B – Interview Guide II

I. Informação pessoal:

- Nome
- Idade
- Formação (BA/MA)
- Cidade de origem
- Data de chegada

II. Situação em Portugal e emigração

- A mídia que tenho lido na Internet reporta muito sobre a nova onda de emigração em Portugal entre jovens qualificados. Até que ponto pode confirmar isso no seu círculo de amigos, colegas ou familiares?
- Sabe se o governo já se declarou sobre o assunto da emigração entre os jovens? Se sim, como?
- Sabe de políticas e/ou incentivos que facilitem a emigração?
- Acredita que a emigração portuguesa possa ter vantagens (econômicas, sociais) para Portugal?
- Acredita que a crise pode ajudar a formar uma nova geração de trabalhadores portugueses mais flexíveis do que gerações passadas?

III. Lusofonia e história

- De acordo com a sua vivência, quais são as destinações mais escolhidas dos que emigram?
- Até que ponto acha que a importância de se falar português no país escolhido influencia a escolha do emigrante?
- Sabe de pessoas que tenham escolhido ou focado em um determinado país por causa da língua?
- Acredita que os países Lusófonos atraem jovens por outras razões do que a língua? Por que?
- Nota-se alguma ligação especial de Portugal com antigas colônias que possa influenciar a escolha?
- Propaga-se a ideia em Portugal de 'Países Irmãos' em relação às antigas colônias?
- Propaga-se a ideia de que é fácil/difícil emigrar para países Lusófonos em Portugal?

IV. Mídia

- Assistia televisão ou ouvia rádio em Portugal?
- Quais são os produtos culturais brasileiros mais populares em Portugal?

- O que se vê na televisão ou se ouve na rádio portuguesa sobre o Brasil?
- Agora que está cá no Brasil, o que acha da imagem propagada na mídia sobre o Brasil em Portugal?
- Até que ponto acha que essa imagem do Brasil pode influenciar o desejo dos jovens de emigrarem para o Brasil?

V. Decisão de emigrar e escolha pelo Brasil

- Até que ponto diria que a situação econômica e social de Portugal atualmente teve influência na sua decisão de emigrar?
 - Qual foi o fator decisivo que a/o levou a emigrar?
 - Como foi a reação de familiares/amigos à sua decisão de emigrar?
- Qual foi a reação ao fato de escolher pelo Brasil e mais especificamente pelo Rio de Janeiro?
- Já tinha estado no Brasil antes de emigrar?
 - Quando começou a pensar emigrar para o Brasil?
 - Por que escolheu o Brasil? Por que escolheu o Rio de Janeiro?
 - Pensou em emigrar para outro país? Se não, pensou em escolher outra cidade no Brasil?
 - O que lhe atrai no Brasil/Rio de Janeiro?
 - Como diria que seu interesse/fascínio com o Brasil surgiu?
 - Como se preparou para emigrar? [recolher informações, buscar contatos, etc]

VI. Processo de emigração (possibly sensitive information)

- Quais foram os passos que tomou depois que decidiu emigrar?
 - Já tinha contatos no país? Pessoais (amigos) ou profissionais?
 - Veio com trabalho em vista ou tinha ideia de como encontrar trabalho?
 - Acredita que a procura de emprego foi mais fácil/difícil por ser portuguesa (não necessariamente por falar português!)?
 - A sua atual empresa se dispôs a tratar do assunto do visto?
 - Teve dificuldade em encontrar uma empresa que estivesse disposta a entrar com o pedido de autorização de trabalho e consequentemente de tratar do visto?
 - Como foi o processo de obtenção de visto?
- Teve dificuldade com a validação de diploma ou qualquer outra coisa burocrática?
[perguntar sobre a obrigação da empresa de provar que realmente veio 'contribuir' com alguma coisa específica]
- Entrou com visto de turista no país ou já tratou de tudo em Portugal?
- Qual é a sua situação legal no momento (ainda está com o mesmo visto, etc.)?
[possibly sensitive: reassure interviewee about use of information]
- O processo de obtenção de visto foi mais fácil ou mais difícil do que imaginava?

No caso de ter sido mais difícil, acredita que deveria ter sido mais fácil para um português?

- Sabe de experiências em outros países (Lusófonos) que tenham sido diferentes?
- Sabe de experiências de brasileiros em Portugal com vistos?

Foram mais fáceis ou mais difíceis do que o seu processo no Brasil?

- Em geral, acredita que migrações entre países Lusófonos deveria ser facilitada? Por que?
- Acha que é mais fácil ou mais difícil para portugueses em relação a outros estrangeiros obter um visto de trabalho no Brasil?

VII. Recepção, adaptação, integração

• O que acha nitidamente parecido ou diferente de Portugal aqui no Rio de Janeiro?
[cultura, clima, estilo de vida, mentalidade, comida, costumes, etc.]

- Esperava encontrar tantas coisas em comum ou mesmo diferentes?
- Acredita que a sociedade brasileira está aberta a receber imigrantes estrangeiros?
- Acha que outros estrangeiros são mais ou menos aceites no Rio de Janeiro que os portugueses?

[gringos/portugas]

Por que? O que faz os portugueses mais ou menos aceites?

- Sente-se bem recebida no país por brasileiros?
- Sente alguma forma de discriminação por parte dos brasileiros com base no seu sotaque ou nacionalidade?
- Como é a sua experiência com instancias oficiais ou governamentais, especialmente a PF, por ser portuguesa?
- Lida muito com piadas de portugueses?
- Lida com comentários ou piadas sobre o estereótipo de 'colonizador' ou período de colonização como um todo?

• Sente de forma geral algum tipo de discriminação do brasileiro contra o português? Ou diria que é justamente ao contrário?

• Com a informação sobre o Brasil que tinha antes (histórica, social, cultural, etc) esperava ter sido recebida(o) de outra forma no país?

• Acredita (com base talvez em experiência de que tenha ouvido) que teria sido recebida de forma diferente como imigrante num país europeu ou noutro país Lusófono? Se sim, por que o Brasil se destaca no tratamento ao imigrante português?

- Sente que suas qualificações são bem aceites no ambiente de trabalho?

Fazem comentários relacionados ao fato do seu curso/qualificação ser português?

- Tem mais amigos portugueses, brasileiros ou internacionais?

Como conhece a maioria das pessoas aqui no Rio de Janeiro?

• Como é a primeira reação das pessoas nos contatos pessoais ao fato de ser portuguesa?

- Quais são as suas perspectivas para seu futuro no país?

Quanto tempo acha que ainda fica por aqui? Imagina-se a criar sua base aqui no país?

- Sente falta de alguma coisa portuguesa aqui no Rio de Janeiro?

[material, social, cultural, familiar]

- Tem vontade de viver em outros países em alguns anos?
- Voltará à Portugal para viver?

VIII. Finalização

- Estas eram as perguntas que queria fazer. Gostarias de contar algo mais que possa complementar a entrevista sobre o teu processo de emigração, recepção, adaptação ou mesmo sobre as diferenças ou semelhanças entre Portugal e Brasil?
- Gostaria de receber o resultado final da tese por e-mail?

Appendix C – Social Media ‘call’

Oi pessoal,

Sou estudante de mestrado em geografia humana na Radboud University Nijmegen (Holanda) e estou no Rio fazendo a minha pesquisa sobre a recente imigração portuguesa no Brasil, mais especificamente no Rio de Janeiro, desde o início da crise mundial de 2008. Estou principalmente interessada em saber como jovens imigrantes portugueses se sentem recebidos no Brasil, quais eram as expectativas que tinham antes da imigração e como está sendo a atual experiência, tanto no que diz respeito às leis que regulam a imigração quanto aos contatos pessoais e profissionais entre portugueses e brasileiros.

Procuro jovens portugueses de até 35 anos, com curso superior em qualquer área (bacharelato ou mestrado) e que tenham imigrado depois de 2008. A atual situação legal ou profissional não importa. A entrevista deve durar em média 45 minutos e estou disponível para marcar em qualquer dia e em qualquer bairro do Rio durante todo o mês de maio.

Caso se encaixe neste grupo e ache interessante oferecer sua perspectiva sobre o assunto participando da pesquisa, por favor mande um email para luanagamagato@student.ru.nl ou uma mensagem privada aqui no Facebook.

Desde já obrigada pela força!

Luana

Appendix D - Abstract

The objective of this master's thesis is to offer a qualitative case study research of post-crisis North-South migration flows, by analyzing recent flows of young highly-skilled Portuguese migration to Brazil. The focus is on the personal level, thus on the personal experiences of the Portuguese immigrants on their own migratory process. A framework of analysis based on Migration Systems Approach was adopted, which focused on present day's mass cultural connections and regulatory linkages that might facilitate or incite Portuguese migration to Brazil.

As many former European colonial powers, Portugal shares an intense history with its former colonies. One of the repercussions of this shared colonial history is increased migration flows between these countries. Portugal and Brazil are often seen as the traditional members within the so-called Lusophone Migration System, mainly because migration flows between these two countries has always been significant, despite its dynamic character (in numbers and directions).

In order to find out to what extent young Portuguese immigrants in Rio de Janeiro, Brazil, felt connected to Brazil before emigrating, thirteen qualitative semi-structured interviews were conducted alongside an extensive literature review on different aspects that hold relation to the topic. What I found out, was that although the presence of Brazilian cultural elements – and to some extent Brazilian immigrants – in Portugal makes young Portuguese feel more connected to the country and its culture (which encourages choosing Brazil as a migration destination when migration is considered as a strategy of coping with the economic crisis), existing regulatory linkages no longer facilitate migration to Brazil. This lack of facilitating regulations is a repercussion of diplomatic setbacks during the second half of the 1980s and the beginning of the 1990s that coincided with Portuguese accession to the European Union. The difficulties experienced go against the idea that most of my respondents defend that they should have their 'way-in' facilitated, since they share a history and a language with the country, a perspective which emphasizes the Lusophone imaginary that shapes the way Portuguese see the world and relate to their past history and former colonies.

In other words, while today's migrants feel connected and attracted to Brazil by more than a shared history and language – namely also by their familiarity with Brazilians in Portugal as well as Brazilian soap operas and music – the regulatory linkages in place today do not encourage Portuguese migration like they used to in different periods in history. In fact, one could say that the current typical Portuguese immigrant in Brazil experiences the setbacks of Luso-Brazilian diplomacy in the everyday life context like no other generation of Portuguese in Brazil has ever done. This is visible in the difficulty experienced in finding jobs and obtaining residency permits. While the general opinion among my respondents emphasizes the assumption that it should be easier for the Portuguese to migrate to Brazil, the reality is that today the entrance of Portuguese is in no way facilitated, despite the connections that are deeply felt by the Portuguese.

