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Perceptions on meritocracy and tax justice: an exploratory analysis

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Masters in Sociology

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SOCIOLOGIA
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Abstract

This dissertation examines how various social classes in contemporary Portugal perceive meritocracy and tax justice, with a focus on the Professionals and Managers (PM) class. Through a quantitative survey, the research reveals a significant gap between actual socioeconomic status and self-identification, as a considerable number of individuals considered themselves middle class, and only a small number felt they had achieved upward mobility compared to their families, despite indicators suggesting otherwise. There's also widespread scepticism about meritocracy, with a great majority rejecting the notion of equal opportunities independently of individuals' backgrounds. Regarding tax justice, a majority support higher taxes on high earners, with women more likely to advocate for government intervention to address inequality. Overall, the findings contribute to discussions on class consciousness and reflect a strong desire for a more egalitarian society in Portugal.

Keywords: social class, meritocracy, tax justice, social mobility.

Resumo

Este trabalho interroga-se como as várias classes sociais, no Portugal contemporâneo, entendem os conceitos de meritocracia e de justiça fiscal, com um foco específico na classe dos Profissionais Técnicos e de Enquadramento (PTE). Através de um inquérito quantitativo, a pesquisa revela uma lacuna entre o estatuto socioeconómico real e a autoidentificação, já que um número considerável de indivíduos se considera classe média, e apenas uma pequena parte sente ter alcançado mobilidade ascendente em comparação com as suas famílias, apesar de indicadores sugerirem o contrário. Existe também uma descrença generalizada em relação à meritocracia, com uma grande maioria a rejeitar a ideia de igualdade de oportunidades, independentemente do contexto de origem dos indivíduos. No que toca à justiça fiscal, a maioria apoia impostos mais elevados sobre os que ganham mais, sendo as mulheres mais propensas a defender a intervenção do governo no combate à desigualdade. Os resultados contribuem para a discussão sobre a consciência de classe e refletem um forte desejo por uma sociedade mais igualitária em Portugal.

Palavras-chave: classe social, meritocracia, justiça fiscal, mobilidade social.

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Introduction

In recent years, the wealth gap between the elite and the rest of us has increased dramatically, revealing the bleak reality of economic inequality in contemporary societies. A report from 2018 indicated that just eight individuals possess the same wealth as the poorest half of the global population (Pluchino et al., 2018). The World Inequality Report (Chancel et al., 2022) shows that the global bottom 50% of individuals holds a mere 2% of the total wealth, while the top 10% captures 76% of household wealth. If these statistics weren't depressing enough, the COVID pandemic came and shattered this number, with the combined wealth of billionaires in the USA growing by a staggering 88% in the last 4 years alone (Inequality.org, 2024), while half of all the wealth created in the last decade went straight to their bank accounts (Thériault, 2023). These alarming statistics raise critical questions about the underlying mechanisms facilitating such an uneven distribution of wealth. The pervasive belief that individual success reflects inherent merit rooted in talent, effort, and determination has given rise to a meritocratic ideology that shapes societal perceptions and policies. According to this paradigm, success is often perceived as a direct outcome of personal traits, which not only influence societal allocation of resources but also legitimize the existing power dynamics (Pluchino et al., 2018). As societies struggle with an increasing escalation of inequality, brought about by the neoliberal political and economic framework emerging as a dominant ideology since the late 20th century, meritocratic beliefs are being reinforced by this system of hegemonic economic and political thought. This disparity invites further examination of how individuals perceive their positions within the socio-economic landscape and how these perceptions shape their beliefs about fairness and justice.

Despite growing awareness of structural inequalities, many individuals, particularly those from the working class, continue to adhere to meritocratic ideals, attributing their successes and failures to personal merit rather than acknowledging the influence of systemic factors (Mijs et al., 2022). This disconnect is compounded by a shift in the conceptualisation of "responsibility," where accountability is increasingly viewed as an individual obligation rather than a collective duty to address societal inequities (Mounk, 2017). The implications of this shift are profound, as they not only influence individual attitudes toward social mobility but also shape public discourse surrounding poverty and inequality.

Understanding how these intertwined concepts of meritocracy, individual responsibility, and social mobility inform people's perceptions of fairness is essential for addressing the persistent

inequalities that afflict our societies. This study aims to explore the perceptions on the fairness of the Portuguese tax system and the believe in meritocracy, investigating how these beliefs intersect with individuals' social class and political leaning. Through this research, we seek to contribute to the literature on social class and meritocracy, particularly within the Portuguese context, thereby advancing our understanding of the role these beliefs play in perpetuating or challenging existing inequalities.

Theoretical Framework

Tax Justice

According to Barrada e Martins (2008) tax justice involves distributing the tax burden fairly among taxpayers, based on their ability to pay. There are a few principles that should be applied without favour - elements that characterize tax justice and are fundamental to ensuring an equitable and effective tax system. Amongst them we can count equity, the idea that taxes should be applied fairly, taking into account each taxpayer's financial capacity; progressivity, when the progressiveness of the tax system requires those with a greater ability to pay to contribute a larger share of their income in taxes; transparency, tax rules should be clear and understandable, ensuring that taxpayers know how and why they are being taxed; efficiency, the fairness of a tax system should efficiently collect revenue without causing significant economic distortions; and responsibility, when the resources collected should be used responsibly and transparently for the benefit of society as a whole.

Still citing Barrada e Martins (2008), there are some sources of tax injustice in Portugal. Also tax benefits, according to Basto (2001) tax breaks and other special treatments for some end up creating disadvantages for those who cannot access them, resulting in unfairness. The author believes we should eliminate these benefits entirely, particularly those that reduce tax revenue (as is the case of the new <35 income tax). This is especially relevant for tax breaks on healthcare and education expenses, as well as other social, environmental, and economic programs. Since this is a sociological work rather than a study on fiscality, we will not delve into the mechanisms of such policies. Instead, we will focus on their impact on people's perceptions of the fairness and justice of the Portuguese fiscal system. If there are perceived injustices in the tax system, evaders might be seen as people trying to achieve justice on their own, creating an environment where tax evasion becomes socially acceptable. (Basto, 2001)

However, taxation has become a much broader issue. The concept of tax justice has undergone a significant transformation in the last two decades. In the past, tax justice was primarily concerned with ensuring that everyone paid their fair share of taxes. However, in recent years,

tax justice has come to encompass concerns such as tax avoidance, tax evasion, and the impact of taxation on inequality.

When most economic activity was domestic, national tax authorities covered most relevant economic units. In the era of globalisation, capital, as well as the wealth of rich individuals, has become highly mobile (Murphy & Christensen, 2012). One of the most significant changes in the way we think about tax justice has been the rise of globalization. In the past, taxation was largely a national issue. However, the increasing interconnectedness of the global economy has made it more difficult for governments to collect taxes from multinational corporations and wealthy individuals. This has led to a growing concern about tax avoidance and evasion, which are estimated to cost governments trillions of dollars each year (Murphy & Christensen, 2012).

Another major change has been the rise of inequality. In recent decades, the gap between the rich and the poor has widened in many countries. Growing demand for progressive taxation has resulted in reducing inequality and ensuring everyone pays their fair share.

The evolution of tax justice has been influenced by several factors, including globalization, inequality, and the rise of new technologies. The internet and digital tools have facilitated the movement of money across borders, making it easier to hide assets from taxation. The increasing complexity of tax legislation has made it difficult for the average person to understand their tax responsibilities and for authorities to enforce tax regulations effectively (Slobodian, 2023).

Moreover, the growing power of multinational corporations and wealthy individuals, who have lobbied for tax cuts and created loopholes to avoid fair taxation, has exacerbated the issue. These factors have made it harder for governments to collect taxes, and many have not developed mechanisms to regulate money transfers or curb the hoarding of wealth by the richest in society. The proliferation of these unregulated practices has led to growing calls for progressive taxation (Slobodian, 2023).

Some tax avoidance practices are legal. In "The Triumph of Injustice," Saez and Zucman (2019) demonstrate how wealthy individuals often avoid tax obligations by receiving income in the form of tax-exempt benefits from employers, such as corporate jets, luxurious offices, lavish meals, and sponsored events in high-end locations like Cape Cod or Aspen. Additionally, the

affluent exploit legal loopholes to significantly reduce their tax liabilities. Contrary to the common belief that tax evasion is mainly practiced by the poor, evidence shows that the wealthy engage in more tax evasion than other income brackets.

The transformation of tax justice is ongoing and is likely to remain a critical issue in the foreseeable future.

Meritocracy

Starting in the last two decades of the 20th century, with the rise of neoliberalism as the hegemonic political and economic ideology, inequality has escalated in most OECD countries, and we have seen a surge in the amount of wealth being hoarded by the richest in society. A very recent report reveals that the wealth gap is even larger than previously thought: eight men now possess the same wealth as the 3.6 billion people who make up the poorest half of humanity (Pluchino et al., 2018). According to the World Inequality Report (Chancel et al., 2022), the global bottom 50% accounts for 8.5% of total income when measured at Purchasing Power Parity (PPP) and holds only 2% of wealth. In contrast, the global top 10% owns 76% of total household wealth and captures 52% of total income as of 2021. We should ask ourselves how these individuals attained their wealth. If individual wealth is viewed as a proxy for success, one might argue that its highly uneven distribution is a result of natural differences in talent, skill, competence, intelligence, and ability, or a reflection of willpower, hard work, and determination. This assumption indirectly underpins the meritocratic paradigm, which influences how society allocates work opportunities, fame, and honours as well as the strategies governments use to distribute resources and funds to those deemed most deserving (Pluchino et al., 2018). The idea of who deserves what is intertwined with the concept of meritocracy, a term often invoked to legitimize one’s position in society. Defined by Merriam-Webster as "a system, organization, or society in which people are chosen and moved into positions of success, power, and influence based on their demonstrated abilities and merit," serving as the foundation for our ideas about deserts, or what individuals deserve based on their actions. This concept ties up merit with justice and morality (Swift & Marshall, 1997), positioning merit as a kind of moral high ground. We can trace the beginning of this trend to a shift in the meaning of the word “responsibility.” During the 1980s, particularly through the speeches of Margaret

Thatcher and Ronald Reagan, there was a transition from understanding "responsibility" as a duty to others and society, to perceiving it as accountability, creating an obligation to look after oneself. As Mounk (2017) observes: “The beliefs that gradually started to dominate moral and political philosophy in the late twentieth and early twenty-first centuries are very different,” from the past (…) the rejection of “pre-institutional notions like desert: they do not believe that our institutions should seek to distribute goods in such a way that they track the distribution of criteria, like virtue or talent, that supposedly exist independently of political institutions.” He goes on showing how in discussions on poverty, the emphasis has shifted, for both academics and policymakers, from discourses on eliminating poverty entirely to a focus on rewarding those individuals who “work hard and play by the rules. On the other hand, we find the once marginal belief that the cultural values and choices of the poor partly contribute to the “cycle of poverty”” has moved into the mainstream, gaining acceptance (Mounk, 2017).

As this shift in discourse and the rise of these now mainstream ideas influence our sense of self-worth, individuals who attribute their success primarily to hard work are often the least likely to recognize the role their background may have played. This disconnect is present even among some privileged individuals who acknowledge societal inequalities in a general sense but struggle to see how the same structures have personally benefited them. Many also express feeling limited in their ability to change the inequities within their fields, even though they were often in positions to challenge this reality (Brook et al., 2021). Newman (2015) suggest that wealthier Americans are more inclined to support meritocratic beliefs when they live in areas with greater inequality, and according to Mijs (2022), people tend to tolerate higher levels of inequality as their society becomes more unequal, while those who have experienced upward social mobility tend to hold a stronger belief in meritocracy, a self-perpetuating, vicious circle; and once you’re caught in it, blinds you to the reality. Morris (2022) shows that people of higher status tend to view the current social structure as fair and justified, arguing that being more exposed to inequality makes high-income individuals more aware of their privilege, prompting them to justify both the system and their own success within it.

Unsurprisingly, individuals from the working class often recognize structural inequality better than those from other social groups. Despite this awareness, their faith in meritocracy remains intact. People living in unequal societies frequently continue to believe that success is based on individual merit, rather than external structural influences beyond their control (Mijs & J. J. B., 2019), while individuals who credit their success primarily to hard work are often the least likely to recognize the role their background may have played.

The notion of meritocracy is so deeply ingrained in people's perceptions of their own life histories that it becomes difficult to see beyond it. It manifests as an internalized meritocratic ideology, obscuring the structural influences affecting individuals' lives. This holds true for those experiencing significant precarity and insecurity who interpret their circumstances based on personal misfortunes, as well as for those favoured by the system who rationalize the advantages or disadvantages, they encounter in their social circles. People in highly unequal societies perceive politics through the lens of their own limited experiences. While some social mobility occurs in our societies, top positions remain largely safeguarded by those in power. It is crucial to recognize how individuals perceive their lives in the context of inequality (Brook et al., 2021). This leads individuals to underestimate the depth of economic disparities and undervalue the non-meritocratic, systemic factors that create, foster, and sustain the structural divides between the wealthy and the impoverished (Pluchino et al., 2018). Consequently, elites often remain oblivious to the privileges they enjoy, while individuals born into disadvantage believe they alone are responsible for their inability to surmount the significant obstacles to upward mobility (Mijs & Savage, 2020). As Friedman and Laurison (2020) state, "It's easy to see why such explanations are popular. They provide legitimacy for both the status quo and for one's own career progression." In a world that emphasizes responsibility as accountability, every person is seen as accountable for overcoming their own hardships (Mounk, 2017).
Many individuals may not even be fully aware of the forces driving these changes and lack a comprehensive understanding of the trends and ideas shaping these shifts, often underestimating the true extent of inequality present in their communities (Mijs & J. J. B., 2019). Savage (2016) tells us of how the more elite or professional contacts people have in their circle, the more they identify with the upper middle class and are less likely to support policies aimed at reducing inequality or enhancing social mobility.

The ideas presented above are consistent with longstanding social-psychological research on the justification of inequality. The "just-world" belief suggests a widespread tendency to perceive inequalities as the result of a merit-based system. This viewpoint allows individuals to maintain their belief in a fair society, thereby avoiding the need to address existing inequalities. Furthermore, neoliberal policies implemented across the Western world since the 1980s have likely reinforced the notion that successes and failures in the free market reflect individual abilities and efforts, or the lack thereof (Mijs & J. J. B., 2019). Andersen and Curtis (2015) research indicates that at lower levels of income inequality, the working class exhibits

especially greater support for government intervention. On the other hand, at extremely high levels of income inequality, opinions across all social classes show minimal differences, meaning that the differences in perspectives among social classes diminish considerably as income inequality increases.

Methodology

The research project, on perceptions of meritocracy and tax justice, was designed to explore aspects of contemporary perceptions on the replication of inequalities within, as well as across, social classes. The focus of this research was to gather anonymous data on how respondents see aspects of their society and how their political lenses reflect on their views on meritocracy and tax justice.

The methodology employed quantitative data through an online survey designed to understand people's perceptions on the subjects we are concerned with. The method was a mix of convenient and snowball sampling, along with street-level recruitment through QR code distribution, which introduced several limitations.

The decision to do a survey was based on other similar studies done elsewhere. The example of the European Social Surveys (ESS), and the studies relying on the ESS data (Bartram, 2023) or in the case of Friedman et al. (2021), where an analysis of the UK Labour Force Survey was first conducted, then surveys were distributed to the entire organisation where the study took place, before some individuals were chosen to participate in interviews. Our questionnaire was designed to answer our hypothesis, asking people about their views on Portuguese society, their perception of the amount of paid tax, and how they see the fairness of their income, always based on their perceived responsibilities and their job description.

The survey had only one open question, where participants were asked to detail their profession. The openness of the question was not really a choice but a practicality. Because the answer informs the social class of each respondent, it had to be tightly controlled to safeguard the accuracy of this study, depending on its correct categorisation. In opposition to the single open question referred to above, all the others were of multiple choice, where a sentence or graphic were presented, and respondents asked to answer with degrees of agreement.

The questionnaire was structured in four parts. Firstly, we asked respondents their age, gender, and profession. Throughout this section, perceptions of their own class and that of the family they grew up in, individuals were asked to reflect on their perceived social class, and, if they think of themselves as coming from a particular class background; if they perceived any upward or downward social mobility during their lifetime, when comparing to the social class they believe the family they grew up in was a part of.

Secondly, general questions on their views on the justice and fairness to access opportunities and the fairness of their income based on the demands and tasks expected on the job, as well as a drawing with different social pyramids (Figure 1) where respondents were asked which of the pyramids they consider the contemporary Portuguese society to represent and which they think society should resemble.

Thirdly, questions on the perceived fairness of the Portuguese tax system. Individuals were asked to give their opinion on how they see the tax paid by companies (big and small) and of government management of said taxes.
Fourthly, respondents were asked to indicate their political leaning on a scale and to reveal their vote in the last election.

All questions on meritocracy were taken from the European Social Survey (ESS 8, 2017), as well as most questions on tax justice. We added the last two questions about political leaning and voting.

For the analysis, a Meritocracy Index was created to quantitatively assess individuals' belief in the concept of meritocracy, allowing for a standardized measure of how strongly respondents support or reject meritocratic principles, enabling a more nuanced analysis of the relationship between beliefs in meritocracy. The responses from a series of Likert-scale questions included in the survey were designed to capture various dimensions of the respondents' attitudes towards meritocracy. Questions such as: the belief that people who work hard will succeed; the belief that everyone has an equal opportunity to advance in society; or even whether external factors like family background, race, or social connections play a role in achieving success.
Each of these questions, in a total of 13, was rated on a scale from 1 (strongly disagree) to 5 (strongly agree). After collecting the responses, the index was calculated by adding the score of all 13 questions and then dividing it by 13, the total number of questions quantifying meritocracy. Higher scores, on a scale of 1 to 5 on the index, represent stronger beliefs meritocracy, while lower scores indicate scepticism or rejection of meritocratic principles.

$$\text{Meritocracy Index} = \frac{Q1+Q2+Q3+Q4+Q5+Q6+Q7+Q8+Q9+Q10+Q11+Q12+Q13}{13}$$

The ACM categories (Mauritti et al., 2016) were used to allocate a class to each individual based on their profession and employment status, as explained above. With a total of 402 valid responses, the sample is heavily skewed toward the professionals and managers class (PM) with 282 respondents (70%), while the self-employed (SE) and industrial workers (IW) are severely underrepresented, with only 9 and 2 respondents, respectively. This imbalance limits the statistical relevance of the SE and IW classes, making it difficult to draw meaningful conclusions for these groups; therefore, these two groups will not be part of this analysis. The Entrepreneur and Executive class, with 58 responses (14%), and the Routine Employees class (RE), with 51 responses (13%), however, have a sufficient number of respondents to support basic analysis, though even these findings have been interpreted with caution given the non-random nature of the sample. The overrepresentation of the PM class reflects a bias toward the perspectives of professionals and managers individuals, which may have skewed results on topics such as meritocracy and tax justice. Consequently, the findings cannot be generalized to the entire Portuguese population and are more reflective of the views of urban, middle- to upper-class individuals. This study acknowledges these sampling limitations, which impact the statistic validity of the results, particularly regarding inter-class comparisons.

The nature of the geographical area where the sampling was conducted might have had a significant impact on the social classes of the respondents. There was a real difficulty in getting to Industrial Workers (IW), with only two responses coming from this group. A surprise, when it comes to data, is the very low number of respondents that fall into the self-employed (SE) category. It might be for the very nature of the categorisation that a lot of respondents, one would think would fall into the category of self-employed, fall into the Professionals and Managers (PM) category, which gives the latter social categorisation a very high percentage of respondents. Therefore, we will not analyse this group. When comparing the percentage of respondents, by social class, in our sample to the sample of the ESS 2012 (Mauritti et al., 2016), we can see that there are some big differences in percentage of respondents per social class.

Table 1 Class locations: ACM typology

EE	Entrepreneurs and executives
PM	Professionals and managers
SE	Self-employed
RE	Routine employees
IW	Industrial workers

		Employment status		
	Occupations ISCO 08	Self-employment with employees	Self-employment without employees (own account workers)	Employees
1	Managers	EE	EE	EE
2	Professionals	EE	EE	PM
3	Technicians and associate professionals	EE	EE	PM
4	Clerical support workers	EE	SE	RE
5	Services and sales workers	EE	SE	RE
6	Skilled agricultural, forestry and fishery workers	EE	SE	IW
7	Craft and related trades workers	EE	SE	IW
8	Plant and machine operators, and assemblers	EE	SE	IW
9	Elementary occupations	EE	SE	RE/IW

Note: The employees of the 9.1, 9.4, 9.5 and 9.6 occupational groups are classified as RE; the employees of the 9.2 and 9.3 occupational groups are classified as IW.

Figure 1: ACM typology of class locations (Mauritti et al., 2016)

Data analysis and discussion

Each of the respondents were encouraged to complete the survey before sending it out to their friends, family, or work colleagues. This method gave us a great number of responses of the top of the Portuguese social classes, with the highest number of answers from people belonging to the Professionals and Managers (PM) class. Knowing this is a method with a high probability of a poor representation of the broader population (Bryman, 2016), as we were proposing to study in this work, there were wishes and concerns in reaching the biggest number of respondents, hoping for the results to be a fair sample of the Portuguese society. Surveys were conducted, also, through the street sampling method.

In this study, we don't make a distinction between people who earn a passive income, in the form of inherited wealth, and those who generate their income through the force of their labour. There is no such distinction in the ACM categorisation (Mauritti et al., 2016) used in this work, which views social classes through the prism of the professions of each individual. It would be interesting to understand, in a future study, how people who live off their wealth, through a passive income, such as renters, see these questions of inequality, meritocracy, and tax justice, being the main beneficiaries of this culture.

Intra class analysis

The Professionals and Managers Class

We will begin by analysing the PM class group, which had the highest number of survey responses according to the ACM classification, with 264 individuals. This large sample size allows us to identify trends specific to this class.

According to Mauritti et al., (2016), nearly a third of Europe's working population is made up of professionals and managers (PM), meaning employees with higher or intermediate qualifications, account for around 31% of the total working population. This group forms a

substantial part of today's middle class in Europe. In Portugal, these individuals are the ones who, on average, have the highest number of school years completed, 15 years, higher than the entrepreneurs and executive class (EE) with an average of 11 years of schooling, the biggest gap in Europe. The second biggest gap can be seen in Italy, where the gap is of two years and where the PM class has also a higher, on average, number of schoolings than the EE class (Mauritti et al., 2016). The PM class is categorised as professionals playing a significant role in the contemporary dynamics of the so-called "knowledge society" (Mauritti et al., 2016). This class is categorised by being employed in the professional and technical occupations, and associate professional occupations ISCO 08. Professions such as doctors, teachers, architects, lawyers, engineers, consultants, or scientists, as long as they are salaried workers, all fall in the category of PM.

Looking closely at our PM class data, there were 144 males and 120 females responding to our survey. Of those, 37,1% fall into the 45-54 age group, followed by 24.6% in the 55-64 age group, 16.3% in the 25-34 age group, 14.4% fall into the 35-44 age group, and 6.8% and 0.8% in the 65 and over and the 8-24 age groups, respectively.

Of those who fall into this category, when asked to self-identify with a social class, 61% say they belong to the middle class, 18.2% self-identify as upper-middle class, aligning with the ACM classification, another 18.2% identify themselves as belonging to the lower middle class, and finally 1.5% and 1.1% identify with the upper class and lower class, respectively.

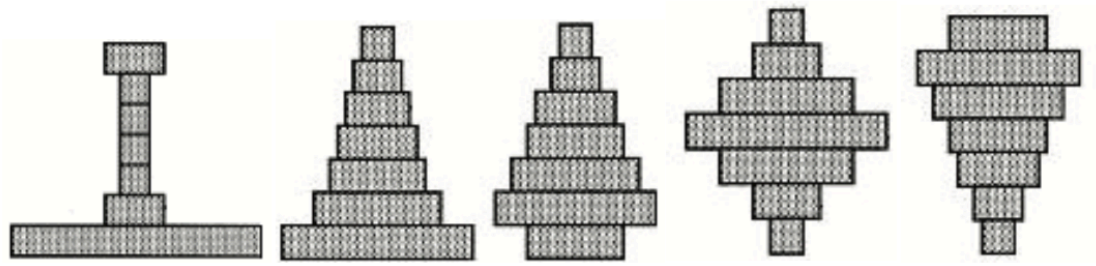
This indicates a mismatch between individuals perceived class and their actual class based on the ACM classification. One likely explanation for this is that many people are unfamiliar with sociological classifications like these. As a result, they lack awareness of the specific criteria, such as their occupation and the nature of their salaried work, that place them in a particular class category. An important step to understand this misidentification would be interviews with some of these individuals to understand their reasoning in self-identifying with a certain class. These results are not a surprise, as most people seem to identify as middle class anyway, irrespectively of their class by any sociological categorisation (Savage, 2016). It would be interesting to know if in Portugal the same thing happens as in the United Kingdom, where the farther people are from London, the more they call themselves "working class" as opposed to "middle class" (Savage, 2016), or if it changes depending on where we are in the country and the preference for political parties and policies of those individuals.

One of the survey questions asked respondents to classify the social class of the family they grew up in. This question aimed at exploring how individuals perceive their current class compared to that of their family, helping to determine whether they believe they have moved up, down, or remained in the same social class they were part of during their upbringing. It is important to note that this perceived class belonging does not align with traditional sociological classifications of social classes. Instead, our focus is on how people view their own social environment and their position within it. It's intriguing to see that when we compare the ACM class classification to how people identify their family's class, only 14.8% remain in the same class as their families, which is the upper middle class. Interestingly, 1.5% have actually moved down to a higher class. Meanwhile, a striking 83.7% have moved up from their family's class. Since we didn't ask about the professions of individuals' parents, we cannot validate these results. They are purely based on respondents' perceptions of the class of their families.

When we measure class changes from upbringing to the present, based purely on individuals' perceptions of both their family's class and their own self-identified class, there's significant movement across the board. About 15.2% of respondents believe they are now in a higher social class than their family was during their upbringing, 45.5% see themselves as being in the same class as their family, and 39.4% perceive themselves as belonging to a lower class than their family growing up. It would be interesting to compare these results by measuring the actual class of their families based on their parents' professions.

Meritocracy

Regarding the belief in meritocracy in the PM class, there are no significant differences between age groups in terms of their belief in meritocracy, here used as the merit index explained in the methodology chapter. All age groups fall into the same homogeneous subset, meaning they share similar means, where it ranges from 2.8 to 3, as it does for the entire dataset, as we will see in the next chapter.



Type A	Type B	Type C	Type D	Type E
A small elite at the top, very few people in the middle and the great mass of people at the bottom.	A society like a pyramid with a small elite at the top, more people in the middle, and most at the bottom.	A pyramid except that just a few people are at the bottom.	A society with most people in the middle.	Many people near the top, and only a few near the bottom.

Figure 2: International Social Survey Programme (ISSP) "type of society" question. Reproduced from (Irwin, 2018).

The survey included a set of two questions designed to encourage respondents to reflect on the structure of Portuguese society. Participants were shown five different representations of imaginary societies, each illustrating various class distributions (Figure 2). In the first question, participants were asked to identify which structure they believe best represents contemporary Portuguese society. In the second, participants were asked to choose the one they wished Portuguese society would resemble. The comparison between these two questions reveals a stark contrast. For the first question, 41.7% of respondents selected Type B (a society with a small elite at the top and most people at the bottom) as the most accurate reflection of Portugal's current social structure, while another 31.4% chose Type A. Additionally, Type C was picked by 20.5% of respondents. Together, these three answers represent 93.9% of responses, indicating a perception of a highly unequal society.

However, when asked about the society they would consider to be ideal, the responses shifted significantly for the two remaining types. A majority of 50.4%, selected Type D (a society with most people in the middle), while 33.3% chose Type E (many people near the top and few at the bottom). These two options accounted for 83.7% of responses, highlighting a strong preference for more egalitarian societal models.

When asked how important are factors such as family background, education, and social relationships for an individual's success in Portugal, 48.9% consider these aspects to be

important, while 46.2% consider it to be very important. A whopping 95.1% consider these factors as, at least, important. While to the assertion “In Portugal, everyone has access to equal opportunities for success, regardless of their social background”, 54.9% disagree and 29.9% strongly disagree, showing a disbelief in the meritocratic nature of their society.

Tax Justice

When we delve into the questions concerning tax justice, we find that there isn’t a statistically significant difference when examining responses by age groups or gender. However, there are two categories where men and women show differing responses, which we will discuss further below.

Let’s begin by examining the Likert scale question: "Do you consider the current tax system in Portugal to be...," respondents could choose from "very fair" to "very unfair," or indicate "don’t know/no response." Among individuals in the PM class, 53.8% consider the tax system to be unfair, 21.2% view it as neither fair nor unfair, and 13.6% find it very unfair. Only 9.1% of respondents believe the system is fair, and none think it is very fair. In total, 67.4% perceive the system to be, at least, unfair. There is an assumption that the tax system, as a whole, is unfair.

When asked to give their opinion on the amount of tax that people with the highest income, in comparison to those in the lowest income brackets, should pay, 62.1% of respondents said these individuals should pay higher taxes on their income, 14.8% believed these individuals should pay more taxes, and 21.6% thought that the taxation was fair.

When we remove the comparison between high and low income earners and simply ask their view on the amount of tax individuals in the highest income brackets should pay, the results are more balanced. 29.5% believe high income earners tax payment is high, 26.9% believe it to be low, 19.3% to be very high, 15.9% believe it to be a fair amount of paid tax, and only 5.3% think high income earners pay very low taxes.

This analysis focuses on individuals in the PM class, but results are not very different when we analyse the rest of the data combined, as we will see in the following chapters.

Difference by gender

We will now discuss the two survey questions where there is a statistically significant difference between genders: the fairness of individual income and the government's role in reducing income inequality through taxation, the only two questions in the survey where this separation was statistically relevant.

To the question "Do you believe your salary to be fair?" again a Likert scale question, ranging from "much less than it would be fair" to "much more than it would be fair", is where we find relevant differences in between genders.
Among male respondents, 30.6% feel their salary is "much less than fair," while 50.0% consider it "a little less than fair." This shows that a significant majority, 80.6%, view their compensation as unfair. Only 18.1% feel their salary is fair, and just 1.4% believe it is "much more than fair."

In comparison, female respondents have slightly different views. 20.2% feel their salary is "much less than fair," and 47.1% believe it is "a little less than fair." A higher percentage of females, 29.4%, perceive their salary as fair compared to males. A small portion, 3.4%, feel their salary is "a little more than fair."

Looking at the overall data from the 264 responses without breaking it down by gender, 74.6% of participants believe their salaries are "much less" or "a little less" than fair. Only 23.1% consider their salary fair, and very few respondents report earning more than what they believe to be fair.

These findings highlight a widespread dissatisfaction with how much people earn in the PM class, especially among male respondents, despite earning an average of 11.4% more than their female counterparts (Disparidade salarial entre homens e mulheres (%), 2024).

When inquired about the importance of the role of the government in reducing inequality with response options ranging from "Not important at all" to "Very important."

Among male respondents, a notable 49.3% believe that the government's role in reducing poverty is "slightly important," while 37.5% consider it "important." Only 3.5% feel it is "not important at all," and 9.7% view it as "very important."
In contrast, female respondents exhibit a different sentiment. None of the female respondents feel that the government's role is "not important at all." A considerable 57.1% perceive it as "important," while 34.5% consider it "slightly important." Only 8.4% think it is "very important." This suggests a stronger consensus among females that the government should play a significant role in addressing poverty, with a majority recognizing its importance, while in between males there is some recognition of the importance of the government's role in reducing inequality, there is a smaller proportion who see it as crucial. It ties up with the results of the question about the ideal society (Figure 2), with an even distribution of wealth.

When looking at the total of 264 responses, a clear majority of 88.6%, believe that the government's role in reducing inequality is either "important" or "slightly important." Only 1.9% think it is "not important at all." This widespread acknowledgment of the government's role indicates a general sentiment that its involvement is necessary for effectively tackling poverty, with females displaying a stronger conviction regarding the significance of the role of government to create a more equal society.

Political leaning and vote

We could not find any statistical relevance by gender or age groups when analysing the data by age group or by gender.
The political leaning scale, which ranges from 0 (far-left) to 10 (far-right), shows a notable concentration in the middle, position 5, with 20.1% of respondents identifying with this moderate stance. A large portion of the sample also leans toward the centre left, with 17.0% selecting position 4 and 15.2% choosing position 3. When combined with those who identified as more to the left of position 2, chosen by 9.8%, these centrists and centre-left (0–5) positions account for 62.1% of all responses, indicating a strong preference for moderate or left-leaning views.
Looking further to the right, positions 6 through 9 make up 33.3% of the sample, with only 0.4% selecting position 10 (far-right), indicating minimal support for extreme right ideologies.

On the left side, positions 0 to 2 represent 14.0% of the sample, suggesting a smaller, but still present, portion of respondents aligning with left-leaning views.

When looking at votes cast in the last election, the distribution of voting preferences among the respondents reveals some interesting patterns. The largest proportion, 25.4%, indicated that they voted for AD (PSD + CDS-PP), making it the most popular political choice in the sample. The second most common response, at 21.6%, was for the PS (Partido Socialista), showing significant support for the mainstream centre parties.

A notable 13.6% of respondents chose Livre, a party, while 11.7% of respondents selected "Did not vote/ No answer", indicating either political disengagement or reluctance to reveal their preference. Another 11.7% said they would vote for IL (Iniciativa Liberal), placing this liberal party alongside the non-voters in terms of popularity.

Support for Bloco de Esquerda (BE) stands at 7.2%, while CDU received 4.2% of responses. The far-right party Chega gathered only 1.5% of the vote, showing limited appeal within this group. Similarly, PAN (Pessoas-Animais-Natureza) has 2.3% support.
Overall, the data reveals a clear relationship between political positioning and voter behaviour. Left-leaning voters tend to gravitate toward parties like BE and PS, while those on the right consistently favour AD and IL. Centrists, especially those in Position 5, demonstrate a more varied voting pattern, with their preferences spread across multiple parties. This suggests that centrist voters are less likely to exhibit strong loyalty to a single party. In contrast, right-leaning voters display more consistent support for AD, indicating a clearer partisan alignment. The findings underscore how political identity shapes voting choices, highlighting the distinctive patterns of support across the political spectrum.

Analysis of the entire dataset

According to ACM typology

There are 55 respondents in EE class. Interestingly, when asked to self-identify with a social class, only a small fraction (5.5%) saw themselves as part of the upper class; a bit more than a quarter (29.1%) identified as upper-middle class, while the majority identified with middle class (52.7%). This suggests that even those at the top often view themselves as middle class, possibly reflecting a societal preference for a middle-class identity over an elite one, as Miles (2011) shows a tendency among upwardly mobile individuals to downplay their accomplishments, portraying their life stories as modest and attributing their success to chance rather than ambition.

For those belonging to the upper-middle class (PM), we have done an in-depth categorisation in the previous chapter.

Among individuals from the lower middle class (RE), comprising 47 people, the majority identified with middle class (57.4%), while 29.8% saw themselves as lower-middle class. This indicates that people in this class generally align their self-perception with the middle to lower-middle class range (Savage, 2016)

Overall, the data shows that many people, regardless of their actual class, tend to identify as middle class. This reflects the dominant role the middle-class identity plays in shaping how people see themselves, even among those in lower classes. It also highlights a tendency for individuals in lower classes to align themselves with or aspire to a middle-class status, which can skew perceptions of their true class position.
These findings reveal the complexity of how social class and identity interact. Many people seem to gravitate toward a more favourable middle-class label, which likely ties to larger societal aspirations and values. Understanding this trend not only deepens our insight into class dynamics but also points to how these perceptions might shape behaviour and attitudes across society (Savage, 2016)

Based solely on perceptions

Participants were asked to do a self-assessment of their social class and that of the family they grew up with. Most participants see themselves as belonging to the middle class, a striking 57.5%, followed by those who self-identify as belonging to the lower middle class, with 20.2% of individuals and 18.3% putting themselves as belonging to the upper middle class. As for the assessment of their family upbringing, the self-identification of the middle class continues to be the biggest slice of the pie, with 45.9%, again followed by the lower middle class (26.5%). In third come, once again, those who identify their families when growing up as belonging to the lower middle class (15.8%). On this question we see the lower class making some numbers, with 10,9%, a big contrast to the self-identification with the lower classes on the previous question that had a mere 1.9 percentual points.

This might make us think that the individuals in this study have mostly been able to ascend social class, at least from the lowest categorisation, breaking free of the constraints they observed growing up. But this is not the case; when examining perceived class mobility, it's striking to note that only 16.9% of respondents feel they have moved up in the social ladder. This means that a significant 83.1% of participants believe they have either remained in the same class or even moved down compared to their families' class. The gap between those who see their social class as unchanged from their family's and those who view themselves as belonging to a lower class is just 4.4%, with 43.7% of individuals perceiving their class as the same and 39.3% feeling they are in a lower class than that of their families while growing up.

When we break it down by age group (disregarding the 18-24 age group, with only 2 individuals), in all age groups, most individuals place themselves in the middle class, as would be expected following the discussion above. The data shows that those perceptions of family class status, against their own, differ significantly across age groups. Older individuals, particularly those in the 45-54 and 55-64 age groups, are more likely to perceive the families they grew up with as belonging to a higher class than themselves, 40.3% and 31.9% respectively, while younger individuals show a trend of lower perception of familial class status, in the age group 25-34 with 7.6% and in the age group 25-44 with 13.9%.

As we can see, when we use the ACM classification (Mauritti et al., 2016), the belongingness to certain classes does not reflect that of the self-identification. The reasons for this disparity have been discussed in the methodology section.

Life interviews would be advantageous to understand individuals' perceptions on how the last years of economic turmoil have affected their view. One possible hypothesis is that inequality in the country has increased over the past two decades. This would be in line with Newman (2015), who suggests that wealthier Americans are more likely to believe in meritocracy as their communities become more unequal. Figure 3 shows a gradual decline in the Gini coefficient from 2004 (the highest value in the data) to 2019 (the lowest value). However, we can verify a rise of two percentage points up to 2020, indicating an increase in inequality since 2019 (Gini index (World Bank estimate)).

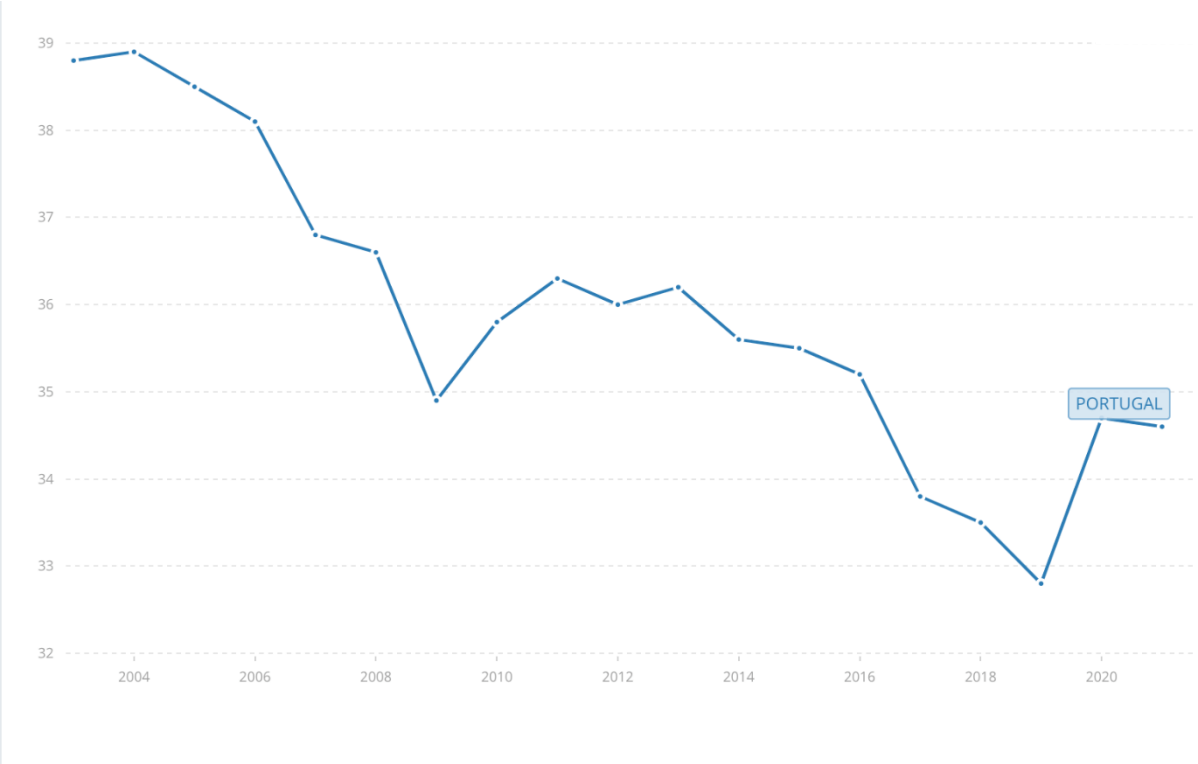


Figure 3: Gini coefficient in Portugal from 2003 to 2020, from (*Gini index (World Bank estimate)*).

While we could not find a correlation between a perceived ascending class regarding that of the family and the belief in meritocracy (using the merit index), we do find individuals over 45 seem to hold a higher merit index in more significant numbers, indicating a potential correlation

between age and merit. The data suggests that as individuals age, they are more likely to have a greater belief in meritocracy. Again, this would be demystified with life interviews of the individuals, as with the quantitative results, it is not possible to obtain individuals" views of the changes in society in the last decades.

Analysis of the whole dataset

In the following analysis, we'll be using the entire dataset, which includes all social classes combined. Although the data from some of the other social classes is sparse and not statistically significant for drawing firm conclusions, it still provides valuable insight into how people view themselves in society, their perceptions of class, meritocracy, and tax justice.

After the categorisation, each of the individuals - age, gender and class (which, as we explained above came from the only open question on the whole survey. All the following questions dealt with the perception of each individual to questions on the equity of the social system, defended and replicated by the state institutions, and their power to redistribute wealth.

To the question illustrating various class distributions (Figure 1) the results were very similar to the ones in the previous chapter, where answers of the PM class were isolated in response to the first question about respondents' views on contemporary Portuguese society, 42.2% of individuals selected Type B, 29.9% chose Type A, and 20% chose Type C, compared to 41.7%, 31.4%, and 20.5% for the isolated PM class. Together, these three answers represent 92.1% of responses for all the individuals in the dataset, indicating a perception of a highly unequal society, as happened for the PM class, where this sum amounts to 93.9% of answers.

When asked about the society they'd consider to be ideal, the responses shifted significantly for the two remaining types, as had happened for the isolated PM class, again, with very similar results. A majority of 51.7%, selected Type D, while 30.6% chose Type E, against 50.4% and 33.3% respectively. These two options accounted for 82.3% of responses, against 83.7% for the isolated PM class. Very similar results to the ones we encountered when analysing the PM class, emphasising a strong preference for more egalitarian societal models. This stark contrast between the perceived current reality and the desired societal structure reflects a collective

aspiration for a more equitable society, which stands in opposition to the unequal class system participants believe exists in Portuguese society today. This ideal scenario reflects a collective desire for a society with fewer disparities.

The examples of Type D and Type E, the preferred options for a society most people would like to live in, represent societies where most of the population is in the upper brackets of the social division: in Type E, the majority of the population is concentrated in the middle class, and in Type F, the majority of the population is in the upper middle class. Based on the data we collected about respondents' perceptions, we might assume that we live in a Type D society, given that most respondents identify themselves as belonging to this class. We conducted a crosstabulation using the meritocracy index and an index of perceived class movement. By subtracting the perceived social class of each respondent from their perceived family class, we found a positive correlation between the meritocracy index and an upward class movement. Those individuals who have perceived an ascendence in social class tend to have a stronger belief in meritocracy, agreeing with the results by Mijs (2022).

When asked if everyone in Portugal has equal opportunities for success, regardless of their social background, 49% disagreed and 32.9% strongly disagreed, making a total of 81.9% of individuals who believe that opportunities aren't equally available. This aligns with the next question, which asked how important factors like family background, education, and social connections are for an individual's success in Portugal. Here, responses were even more unanimous, with 95.4% agreeing that these factors are important or very important. This reinforces the widespread belief that Portuguese society is deeply unequal, echoing the results of the question about social hierarchies.

When asked, "In your opinion, should people with high incomes pay more, the same, or less tax than those with low incomes?", a significant majority of 74.9%, felt that high earners should pay more. However, opinions varied when it came to the question, "Overall, would you say that people with higher incomes in Portugal pay...", responses were divided, with 29.4% believing high earners pay low taxes, 17.2% think the taxation is fair, while 48.7% feel that high-income individuals carry a heavy tax burden.

When we break down the question "Do you consider that the current fiscal system in Portugal is..." we have a clear indication that many individuals (53.8%) responding to this survey,

consider it to be an unfair system. When we break down these responses against the perceived social class of each individual, we see that those who self-identified with the upper class, 62.2% mainly believe the fiscal system is unjust or very unjust at 37.5%. Of those who identified as upper middle class, 39% consider the system fair, while 15.5% and 16.4% rating it as unfair and very unfair, respectively. In the Middle Class, the majority, 56.0%, rated the fiscal system as unfair, while 13.6% rated it as very unfair. A significant portion, 22.6%, also rated it as neither fair nor unfair. This indicates a predominant view that the fiscal system is unjust among those in the middle class. In the lower middle class, 62.7% rated the fiscal system as unfair. This shows a consistent perception of unfairness among those who perceive themselves as lower class.

Political leaning and vote

To analyse the distribution of political leanings and voting patterns in the last elections, a crosstabulation was done between the political leaning scale and the parties voted for. The results are mostly as expected, though a few outliers stand out. The political leaning scale, ranging from 0 (most left-leaning) to 10 (most right-leaning), shows a clear concentration in the middle, with most participants positioning themselves between 3 and 7.

Most respondents describe their political beliefs as centrist, with 21.3% identifying with position 5. Positions 3 and 4 are also quite popular, making up over half the total responses when combined with position 5. Very few participants identify at the extremes of the political spectrum, whether far-left or far-right. This suggests that the majority of respondents hold moderate or slightly right-leaning views, with fewer people at the political extremes.

Among those who lean far-left (positions 0-2), there's a mix of voting preferences. For example, individuals identifying with position 0 are split among BE (16.7%), CDU (50%), Livre (16.7%), and PS (16.7%). Similarly, those in position 1 mostly voted for BE (40%) and PS (20%). Respondents in position 4 show a strong preference for Livre (33.3%), followed closely by PS (30%) and PAN (23.1%).

For those in position 5, the most common political leaning, votes are distributed widely. A significant portion did not vote in the last election (23.1%), while others voted for AD (30.8%)

and PS (19.2%). Position 6 is mostly represented by AD (37.5%) and IL (31.3%), indicating support for centrist or centre-right policies. Those in position 7 lean heavily toward AD (55.6%), showing a clear preference.

On the right side of the spectrum, particularly in position 8, the majority support AD (66.7%). Position 9 voters are more varied, with some supporting AD (45.5%) and others favouring IL (27.3%). While a small group, position 10 voters are evenly split between Chega and PS, each receiving 33.3%.

Looking at these results, we see that AD attracts support from across the political spectrum, especially from centrists in position 5 and centre-right voters in position 7. BE garners votes primarily from left-leaning participants, particularly those in positions 2 and 3. IL tends to draw voters from centrist positions (4 and 5) as well as from the centre-right (positions 6 and 7). Finally, PS receives support from a mix of left- and right-leaning voters, with notable backing from positions 4, 5, and 7.

The data highpoints that most participants position themselves around the political centre, especially in position 5, their votes are spread across multiple parties. This suggests that centrist voters are less tied to a specific party, distributing their votes among AD, PS, and IL. Left-leaning voters (positions 0-2) show more diversity in their choices, though BE emerges as a preferred option. Both AD and IL appear to attract a wide range of voters, spanning from the left to the right, while those on the far-right (positions 8-10) display more consistent voting behaviour, with most supporting AD.

Centrists, particularly those in positions 4 and 5, tend to spread their votes across various parties, reflecting a lack of strong alignment with any single group. In contrast, right-leaning voters are more consistent in their support for AD, and left-leaning voters are more dispersed but lean toward BE. AD shows the broadest appeal, drawing votes from across the political spectrum, reinforcing the idea that political identity strongly shapes voting choices, even though centrist voters tend to distribute their preferences more widely across different parties.
Both sets of data, the PM class and the overall data, have similar political leanings and voting patterns.

Conclusion

This work has examined the complex interplay between social class perceptions, beliefs in meritocracy, and attitudes toward tax justice in contemporary Portuguese society. The findings reveal several patterns that contribute to our understanding of how individuals perceive social mobility, fairness, and inequality in Portugal.

One of the most striking findings is the tendency for individuals across different social classes to self-identify as middle class, regardless of their actual classification according to the ACM typology. This bias appears particularly pronounced among those in the Professionals and Managers (PM) class, where the majority self-identified as middle class despite their higher-class status. This aligns with previous research by Savage (2016) and suggests a complex relationship between objective class positions and subjective class identities.

The research also reveals a significant disconnect between perceptions of current social structure and aspirations for societal organisation. While the great majority of respondents view contemporary Portuguese society as highly stratified (selecting Type A or B configurations), the majority expresses a preference for a more egalitarian structure (Type D or E). This gap between reality and aspiration reflects a collective recognition of society's inequality and aspirations for a more equal society.

On meritocracy, the findings tell us of widespread scepticism about equal opportunity in Portuguese society. An overwhelming number of respondents disagree that everyone has equal opportunities for success, regardless of social background. Recognition of the importance of family background, education, and social connections in determining success reinforces this disbelief.

The findings contribute to theoretical debates about class consciousness and social mobility. They support Miles' (2011) observations about upwardly mobile individuals' tendency to downplay their achievements, as evidenced by the high proportion of PM class individuals who identify with lower class positions than their objective class would suggest. Also, they align with Mijs' (2022) findings about the relationship between perceived upward mobility and belief in meritocracy.

The majority of respondents believe high earners should pay more taxes, and their widespread discontentment with the current tax system, which most consider unfair, suggests substantial public support for higher taxes on high earners.

Several limitations of this study suggest directions for future research. The concentration of respondents in urban areas limits our ability to generalise findings to rural Portugal. Additionally, the absence of data about respondents' educational levels and parental education restricts our analysis of intergenerational mobility. We inferred education from respondents' professions, but this doesn't account for those who may be working in jobs that don't align with their educational background. Would the findings differ if we included this level of detail? Likely not, as the data is concentrated in large urban areas.

When comparing the PM class to other social classes in this study, the results are quite similar across the board. For future research, it would be valuable to incorporate individuals from other regions and include questions about both their education and their parents' education to explore if these factors influence perceptions. The introduction of qualitative interviews should give us a better understanding of the reasoning behind class self-identification. Investigating regional variations in class identification, like the patterns observed in the UK by Savage (2016) would be advantageous to give us an idea of behaviour in different parts of the country.

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