

## **Some issues in cross-national comparative research methods: a comparison of attitudes to promotion, and women's employment, in Britain and Portugal**

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This Note has two objectives. The first is to make a modest contribution to both theoretical and methodological debates in comparative cross-national research. The second is to examine some issues relating to recent discussions of women's employment, particularly in relation to the articulation of work and family life and the relative significance of factors influencing the level of full-time employment amongst women. Both of these issues will be examined via an analysis of recent survey data gathered in Britain and Portugal.

### *Cross-national research*

Comparative cross-national research evidence has been widely employed in the development of sociological theory and social policy, as well as other behavioural prescriptions such as the search for 'best' strategies of management. All of these endeavours share in common the requirement to effectively demonstrate the causal relationships that underpin the phenomena under scrutiny – whether this is the effects of social class (e.g. Erikson and Goldthorpe 1992), welfare state development and reform (e.g. Esping-Andersen et al 2002), or the understanding of successful and failing strategies of management (e.g. Womack et al 1990). Although all cross-national researchers share a common objective in establishing cause and effect, their wider objectives vary. Some social scientists are primarily concerned to develop general theory, that is universalistic theories that may be applied to 'societal contexts widely separated over both time and space' (Goldthorpe 1994 16), others have more modest objectives. Policy makers, for example, will be largely concerned to establish 'what works' in particular contexts, and will be less troubled as to whether or not their theories are universally applicable.

General theory, it is often claimed, requires the demonstration of an invariant causal relationship. Thus in Durkheim's comparative sociology (for example, *Suicide* 1952), concomitant variation (or correlation) is used as an 'indirect experiment' in order to establish permanent social scientific cause (or laws) (Ragin and Zaret 1983 736). In a classic statement, Kohn (1987) has argued that if a similar association between variables is found across a range of different societies,<sup>1</sup> then the researcher's confidence in their original theoretical explanation is increased (or confirmed). However, causal explanation in the social sciences is problematic. A number of different factors may be contributing to the phenomenon under investigation (multiple causation), and the relative significance of particular factors may vary between nation states. Furthermore, the same phenomenon may have a different cause in different societies.<sup>2</sup> Pickvance (1995 37) describes this as 'plural causation', that is, '...on different occasions (places and times) different causes act' (see also Ragin 1987). Moreover, at the micro level, even persisting correlations that would be accepted as causal evidence are unlikely to be perfect. That is, in social science 'cause' is probabilistic rather than determinist.

Universalist (or general) theorists have often been 'variable oriented' comparative researchers. As Ragin (1991) argues, 'variable-oriented' approaches are 'radically analytic' in that (national) cases are decomposed into variables, and indeed (Goldthorpe 1994 2) argues that the '...ultimate aim should be to replace the proper names of nations...with the names of variables'. Thus the variable-oriented approach will characteristically work with a limited range of factors. However, a discourse on variables in the absence of context can easily become sterile, and '...erect barriers between investigators and the social contexts that...motivated research in the first place' (Ragin 1991 2). This difficulty has led some to argue for the superiority of 'case oriented' comparative research, that treats societies as whole entities and not as collections of parts. Indeed, extreme culturalists (see discussion in O'Reilly 1996) have argued that the complexity of societal difference is such as to render valid comparisons impossible to achieve.

For general theorists, the problems of multiple causation may to some extent be addressed via the development of techniques of multivariate analysis. The possibility of plural causation, however, raises further difficulties. For researchers seeking to develop general theory, plural causation would result in a finding of difference, rather than expected similarities. When such differences are found, Kohn (1987) recommends that first, researchers should check their methods (this relates to the problem of non-equivalence discussed below), and second, consider a re-formulation of their original explanation. This re-formulation will often incorporate recourse to historical or cultural cross-national differences, rather than the similarities that are the major focus of 'variable-oriented' approaches. In contrast, 'case oriented' comparative research often begins with an investigation of national differences, and, it has been argued, is better equipped to unpack causal complexity than 'variable oriented' comparative research (Ragin 1987). We will not enter into the debate between 'case' and 'variable' oriented approaches here,<sup>3</sup> but we would note that in rather different ways, researchers in both traditions are sensitive to issues of causal complexity. Nevertheless, some researchers still rely on the citation of aggregate variables abstracted from national contexts in order to demonstrate their arguments.

Case-oriented research has been described as 'qualitative' (see Ragin 1987) but this categorisation is rather misleading. Quantitative data will frequently be drawn upon in the description of a case. Thus even if the researcher is working with only a small number of national cases, it is important to ensure that comparable measures are being employed. Both case-oriented and variable-oriented comparative research, therefore, share one major problem: that is, of ensuring that the same phenomenon is, in fact, being investigated in the different countries, that equivalent concepts are being used, and that the variables employed are commensurable with each other. This requirement is problematic, not least because many social science variables are socially constructed. This problem can be addressed by standardising the measurement of variables. For example, comparisons using agreed class schemes, (see Erikson and Goldthorpe 1992), or, as in the International Social Survey Programme (ISSP), agreeing questions and engaging in extensive back translation (See Jowell 1998). Nevertheless, it is impossible to completely overcome problems of commensurability.

It has been argued that given the complexity of the structuring of gender relations, then a case-oriented comparative approach may often be the preferred starting-point (Crompton 2001). Measures of sex difference are the outcome of the structuring of

gender relations, and an apparently equivalent measure (as we shall see in the case of women's levels of full-time employment) may be the outcome of a very different combination of factors in two or more different countries. Nevertheless, sex-associated differences (in earnings, occupational achievements, etc) are important tools in descriptions of gender inequalities, and it is not being suggested that case-oriented comparisons should replace variable-oriented work. The two approaches are complementary to, rather than in conflict with each other. As Ragin (1987, 1991) has argued, it is important to maintain a balance between a discourse on variables and a discourse on cases in comparative research.

In the next section, we will examine these issues drawing on a comparative analysis of similar surveys carried out in Britain and Portugal. We will first, illustrate an apparently intractable example of the problem of commensurability, stemming from persisting 'societal' differences in workplace organisation. Second, we will demonstrate how explanatory errors may follow from a crude comparison of variables abstracted from national contexts.

#### *The problem of commensurability*

The ISSP is an annual attitude survey incorporating a wide range of countries. A specific topic is chosen each year, and this paper draws on the Family 2002 ISSP data for both Portugal and Britain.<sup>4</sup> As part of an ESRC funded project, a further set of questions, relating specifically to employment, were added to the Family 2002 ISSP survey in Britain.<sup>5</sup> Colleagues in Portugal translated these questions and added them to the Family 2002 survey in Portugal. Thus these questions are available only for Britain and Portugal.

Amongst the issues explored in the ESRC project were the topics of gender equity and work-life 'balance'. It is an established fact that, despite women's rising levels of participation in paid employment, and the increase in their levels of qualification, women are nevertheless under-represented in higher-level occupations (Dench et al 2002). A major reason for women's lack of progress within the occupational structure is their continuing responsibility for caring and domestic work (Wacjman and Martin 2002, Blossfeld and Drobnic 2001). As a consequence, women in aggregate are less likely to pursue promotion opportunities than men in aggregate. In order to explore this issue further, the additional ISSP/ESRC questions included questions on individual promotion aspirations, and the requirements for promotion. The questions relating to individual promotion aspirations were:

*Speaking for yourself, how important is it that you move up the job ladder at work?*

*How much do you agree or disagree with the following statement:*

*It is important to move up the ladder at work, even if it gets in the way of family life*

The results for the two countries are summarised in Tables 1 and 2:

Table 1: *Speaking for yourself, how important is it that you move up the job ladder at work?* by class and sex (full-time employees only)

Personal importance		Portugal	Britain
Men only (% agreeing):	Professional and managerial	<b>96.8</b>	63.6
	Intermediate	<b>100.0</b>	56.0
	Manual	<b>90.6</b>	42.5
	<i>Total</i>	<b>93.3</b>	54.9
	Class differences $\chi^2$	<b>5.01</b>	20.02***
Women only (% agreeing):	Professional and managerial	<b>88.1</b>	48.8
	Intermediate	<b>94.6</b>	29.3
	Manual	<b>96.3</b>	13.9
	<i>Total</i>	<b>93.3</b>	38.4
	Class differences $\chi^2$	<b>2.80</b>	24.37***

\*\*\* p<.001

The results for Britain demonstrate a pattern that would have been intuitively anticipated. Men are considerably more likely to think promotion is personally important than women, and professional and managerial employees of both sexes are more likely to think promotion important than intermediate or routine and manual employees. The results for Portugal, however, were rather surprising. Not only was there no difference, in aggregate, between men and women, but there were no significant differences between occupational classes either. Respondents in Portugal were also considerably more likely than respondents in Britain to express an interest in ‘moving up the job ladder’. These country differences were also found in respect of the second question (Table 2). That the Portuguese place more emphasis on ‘moving up the job ladder’ even if it gets in the way of family life seemed particularly surprising given that, as we shall see, on other questions Portuguese respondents emerge as considerably more ‘family oriented’ than the British.

Table 2: *It is important to move up the ladder at work, even if it gets in the way of family life* by class and sex (full-time employees only)

General importance		Portugal	Britain
Men only (% agreeing):	Professional and managerial	<b>23.0</b>	15.9
	Intermediate	<b>38.9</b>	11.3
	Manual	<b>34.7</b>	7.0
	<i>Total</i>	<b>31.5</b>	11.9
	Class differences $\chi^2$	<b>5.72</b>	14.50**
Women only (% agreeing):	Professional and managerial	<b>19.2</b>	8.1
	Intermediate	<b>27.4</b>	5.0
	Manual	<b>16.4</b>	5.3
	<i>Total</i>	<b>21.6</b>	6.5
	Class differences $\chi^2$	<b>3.03</b>	2.17

\*\* p<.01

Following Kohn's recommendations, a careful check was carried out in respect of both translation and methods, and no errors were found. We therefore reasoned that questions about 'moving up the job ladder' meant something rather different to Portuguese respondents as compared to British. Indeed, as we found, employment relations in Portugal are rather different to those in Britain.

Britain and Portugal are countries with very different recent histories. Portugal has seen the relatively recent collapse of the Salazar regime, which was in power from the 1930s until 1974, a series of colonial wars, and high levels of poverty within the population. On the other hand, Britain has experienced a long period of political stability and is, comparatively, a much richer country. One consequence of its corporatist past is that Portugal has one of the highest levels of labour market protection of all the OECD countries (OECD, 1999). Although moves are underway to try and increase mobility in work and to deregulate the job market, these have so far been largely resisted by employees. As an example, the 2003 budget, which reduced spending on administration and promoted compulsory mobility, led to a wave of strikes (OECD, 2003). One reason for this resistance is that there are advantages in staying in the same job in Portugal, as holiday entitlements and pay are often increased over time, e.g. civil servants get automatic promotion after 10 years (the longer you are in the same job, the higher the promotion), and promotion in turn means an extra day's holiday per year. In the highly regulated employment environment of Portugal, therefore, promotion is quasi-automatic, and related to incremental improvements in both pay and holiday time. It may be suggested that the high proportion of respondents in this country agreeing that promotion is personally important is reflective of these generalised expectations.

Britain, on the other hand, has a long history of individualism in employer-employee relations, and recent reports have shown that it has one of the least restricted labour markets of the OECD countries, along with the US, New Zealand and Canada (OECD, 1999). Movement within the job market is common, with families often moving away from older family members (single-pensioner households now represent almost 15% of all households in Britain). De-regulation of the employment relationship has been accompanied by the expansion of 'high commitment' management practices, that include the setting of targets, individual appraisals, and the development of individualised career structures (Grimshaw et al 2002). Thus we would argue that in Britain, 'moving up the job ladder' means something rather different as compared to Portugal. In Portugal, 'moving up the job ladder' means progression through an ordered hierarchy, whereas in Britain, 'moving up the job ladder' has come to mean 'putting oneself forward for individual advancement'. Thus as Maurice et al (1986) have argued, 'societal' differences in patterns of work organisation (and thus career paths) between different countries may be very marked, and direct comparisons may be impossible to achieve.

The greater individualisation of promotion paths in Britain was also reflected in other questions assessing promotion-related behaviours. These were:

*I'd like you to think about how people in your kind of job move up the ladder at your workplace – for example, by getting themselves promoted. Do you agree or disagree that people who want to do this usually have to put in long hours? (Promotion hours)*

*And do you agree or disagree that people in your kind of job who want to move up the ladder at your workplace have to be prepared to move from one part of the country to another? (Move expected)*

*How much do you agree or disagree that people in your kind of job are expected to work longer hours these days than they used to? (General hours)*

Table 3: Promotion hours, move expected, and general hours by class and sex (full-time employees only)

	Men only (% agreeing)				Women only (% agreeing)			
Promotion	Prof and Man.	Inter	Manual	Total	Prof and Man.	Inter	Manual	Total
<b>Promotion hours: Portugal</b>	<b>14.8</b>	<b>20.0</b>	<b>36.1</b>	<b>30.6</b>	<b>35.9</b>	<b>37.7</b>	<b>27.1</b>	<b>33.1</b>
Promotion hours: Britain	54.7	51.4	41.3	49.4	58.7	45.3	42.9	52.0
Country diff. $\chi^2$	39.28**	8.01*	0.99		11.72**	2.02	9.71**	
<b>Move expected : Portugal</b>	<b>39.3</b>	<b>28.0</b>	<b>36.2</b>	<b>37.0</b>	<b>39.0</b>	<b>45.1</b>	<b>20.5</b>	<b>36.2</b>
Move expected: Britain	43.7	38.6	38.1	41.2	38.5	29.3	14.7	33.0
Country diff. $\chi^2$	6.79*	1.09	2.97		3.55	4.54	1.01	
<b>General hours: Portugal</b>	<b>29.8</b>	<b>21.4</b>	<b>23.0</b>	<b>25.4</b>	<b>42.5</b>	<b>18.2</b>	<b>25.5</b>	<b>28.8</b>
General hours: Britain	65.4	62.7	50.8	59.5	68.6	47.1	57.1	59.1
Country diff. $\chi^2$	38.88**	14.79**	59.53**		20.91**	17.09**	11.89**	

\* p<.05; \*\* p<.01; \*\*\* p<.001

In spite of some small cell sizes overall, the most striking feature of the first two rows of Table 3 is that in all occupational groups, British male and female respondents are more likely than Portuguese male and female respondents to think that working longer hours (i.e. demonstrating more individual effort), is likely to be required in order to be promoted. It may also be noted that occupational class differences demonstrate an 'expected' pattern in Britain (the higher the occupational category, the more likely the respondent to think that extra hours will be required to move up the career ladder), but this is not the case in Portugal. Another striking feature of Table 3 is that British respondents are much more likely to think that people in 'their kind of job' are expected to work longer hours than they used to, a further indication of the differences in employment regulation between the two countries. Average *full-time* working hours in deregulated Britain are the highest in Europe (44.9 for men and 40.6

for women, as compared to 41.1 for men and 39.2 for women in Portugal. Labour Force Survey 2002).

*The dangers of abstraction from national contexts*

Some authors, particularly Hakim (2003, 2004) have argued that the case of Portugal may be used to demonstrate the misguided nature of 'feminist' policy aims. For example:

'Feminists and the European Commission have constantly emphasised childcare services as the key factor affecting women's work decisions, despite clear evidence to the contrary. For example, Portugal has almost none of the childcare services that are deemed essential for women to have real choices about returning to work after childbirth, yet Portugal has one of the highest levels of full-time employment in the EU, and the female FTE employment rate in Portugal puts it on the same level as Sweden and Finland' (Hakim 2003 123).

Hakim's logic, therefore, is to suggest that the argument that enhanced childcare services will increase the level of women's employment is 'disproved' by the example of Portugal, where the level of women's full-time employment is high despite relatively low levels of childcare provision, particularly in comparison to Nordic countries such as Sweden and Finland (where levels of childcare provision are high). Here, we would suggest, we have an example of the dangers in cross-national research of relying on the evidence of a single variable, cited without regard to the particular context in which it is embedded.<sup>6</sup>

The level of economic activity amongst women of working age is higher in Britain (71%) than in Portugal (65%), but British women are much more likely to work part-time. Franco and Winqvist (2002 3) demonstrate that amongst couples with a child under 15, there are very similar proportions of 'male breadwinner' families in the two countries (27% in Portugal, 30% in Britain), but the proportions of joint *full-time* households are very different, at 67% in Portugal but only 29% in Britain. That there should be such a high level of full-time work amongst Portuguese women might be thought to be rather surprising in the light of the fact that Portuguese women (and men) appear to be much more 'family' oriented than women in Britain, and significantly more likely to think that both children and family life will suffer if a mother goes out to work, as was demonstrated by a series of questions from the ISSP questionnaire (Table 4).<sup>7</sup> These questions were:

*A job is all right, but what most women really want is a home and children*

*Watching children grow up is life's greatest joy*

*People who have never had children lead empty lives*

*A pre-school child is likely to suffer if his or her mother works*

*All in all, family life suffers when the woman has a full-time job*

Table 4: Emphasis on family life and attitudes to gender roles by sex (full-time employees only)

<i>Items</i>	<i>Men (% saying yes)</i>	<i>Women (% saying yes)</i>	<i>Total % of men and women saying yes</i>
<b>What women really want: Portugal</b>	<b>186 (58.7)</b>	<b>110 (50.0)</b>	<b>55.3%</b>
What women really want: Britain	99 (18.8)	51 (13.5)	16.6%
<i>Country differences: <math>\chi^2</math></i>	<i>142.505***</i>	<i>96.165***</i>	
<b>Life's greatest joy: Portugal</b>	<b>293 (97.7)</b>	<b>202 (96.7)</b>	<b>97.1%</b>
Life's greatest joy: Britain	390 (73.6)	281 (75.9)	74.5%
<i>Country differences: <math>\chi^2</math></i>	<i>76.912***</i>	<i>42.233***</i>	
<b>People without children: Portugal</b>	<b>181 (57.8)</b>	<b>126 (59.2)</b>	<b>58.4%</b>
People without children: Britain	67 (12.4)	22 (5.8)	9.7%
<i>Country differences: <math>\chi^2</math></i>	<i>200.645***</i>	<i>209.534***</i>	
<b>Pre-school child suffers: Portugal</b>	<b>244 (76.5)</b>	<b>169 (77.5)</b>	<b>76.9%</b>
Pre-school child suffers: Britain	217 (40.0)	95 (24.6)	33.6%
<i>Country differences: <math>\chi^2</math></i>	<i>108.146***</i>	<i>163.728***</i>	
<b>Family life suffers: Portugal</b>	<b>193 (61.1)</b>	<b>127 (58.5)</b>	<b>60.0%</b>
Family life suffers: Britain	184 (33.8)	93 (24.3)	29.8%
<i>Country differences: <math>\chi^2</math></i>	<i>60.972***</i>	<i>71.390***</i>	

\*\*\* p<.001

Why, therefore, do such a high proportion of Portuguese women work full-time, given that childcare facilities are not generous, and the majority appear to think that their families will suffer as a consequence of their paid employment? Any explanation of the level of women's employment is bound to be complex, and the importance of particular factors will vary from country to country. There are some cross-national continuities in women's employment – for example, mothers with a higher level of education are more likely to be in employment in all countries (OECD 2001), but nevertheless, country-specific factors are of considerable significance.

One of the major reasons why Portuguese women work full-time is economic need. There are considerable differences in incomes between Britain and Portugal: figures for 2001 show that, compared with an EU-15 gross earnings average of 31910 euros for full-time employees in enterprises with 10+ employees, Portugal was much lower with an average of 13338 euros, and Britain was higher with an average of 39233 euros. Recent OECD data has also shown that Portugal has the lowest per capita income in the euro area and, until the recent expansion, it also had the lowest overall in the EU. Thus as a recent report has argued: 'In Portugal, many families need a full-

time second earner to sustain family income, and dual full-time earnership among couples with children has been the norm since the late 1980s' (OECD 2004 17). The Salazar regime, while emphasising the importance of women's domestic duties, did not exclude women from working. The dual-earner model of family life, based on the traditional rural system, combined with the rise of industrialisation and the depletion of the male workforce due to colonial wars meant that women's employment was always accepted, if underpaid (Wall 1997). Part-time employment in Portugal is not an attractive option as it often lacks the employment protections associated with 'standard' employment, and in any case, the wages of Portuguese men will often be too low to allow for any reduction in family income. We would suggest, therefore, that we have here an example of plural causation. The explanation of levels of full-time employment amongst Portuguese women is simply different from that of the Nordic countries, and we should remain aware of the possibility that an apparently similar phenomenon may be the outcome of different factors in different countries.

### *Conclusions*

In this Note, we have drawn upon a comparative analysis of British and Portuguese data in order to explore a number of issues in cross-national comparative research. The question of commensurability is a recurring problem in comparative work. As a result of our experiences, we would be wary of attempts to comparatively investigate attitudes to 'moving up the job ladder' via survey methods alone. In the case of explanations of the level of women's full-time employment, we have pointed to the dangers of reliance on decontextualised citations of aggregate data in order to make an argument. Considerable variation and complexity is found in the national structuring of gender relations, which are not adequately described in aggregate measures of sex differences. Thus one of our major aims has been to argue, with Ragin, for a balance between a discourse on variables and a discourse on cases in cross-national research on women's employment. Whilst we would certainly not wish to dismiss variable-oriented comparisons of women's employment out of hand, the very complexity of gender means that adequate explanations of particular phenomena will, inevitably, need to have recourse to case-oriented comparative work.

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<sup>1</sup> In Kohn's research, the association between social (occupational) structure and personality.

<sup>2</sup> Indeed, this possibility is why Mill argued that concomitant variation was not, in fact, an appropriate strategy for the social sciences (Ragin and Zaret 1983 736).

<sup>3</sup> An entire volume has been devoted to this issue, see *Comparative Social Research* vol 16 1997.

<sup>4</sup> For a description of the ISSP programme, see Jowell, Brook and Dowds (1993). In 2002, interviews were carried out with a stratified random sample of 2312 in Britain and 1092 in Portugal. Questions on promotion and working hours were asked of employees only (1015 in Britain and 516 in Portugal).

<sup>5</sup> Two ESRC grants were involved: R000239727: 'Employment and the Family', and R000220106: 'Families, Employment and Work-Life Integration'. The extra ISSP questions were developed under the auspices of the first grant, and the research extended to Portugal under the auspices of the second. We are grateful to Karin Wall and Ligia Amaniço for their co-operation in extending the Portuguese analysis, as well as the insights they have given us into the Portuguese case. We would also like to thank Maria das Dorres Guerririo for her help with this research note.

<sup>6</sup> Hakim has also cited Portugal as an exception that 'disproves the rule' in other publications, see Hakim 2004 78, 131. Other examples of random citations include the suggestion (Hakim 2004 145) that the proportion of female parliamentary representatives in Rwanda demonstrates that the development process does not improve women's position.

<sup>7</sup> Other survey research in Portugal has also demonstrated a high level of 'family orientedness'. See Vala et al 2003.

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