

# Rethinking “Equality” and “Unequal Treatment”: What are we talking about when we talk about discrimination?

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Abstract: A short analysis of three case studies (the play of categorizations in Portuguese documents and institutions, the MIPPEX Rangings on Discrimination and the treatment of the European Gypsies [Roma]), is used to bring under reconsideration the efficiency of the passive juridical approach against individual discrimination. Grounding the discussion in research on the socio-historical Identity Processes and Strategies that organise the World-System (and the Social Sciences within it), especial emphasis will be put on the need to promote positive discrimination and political action to solve this kind of invisible extreme discrimination.

## **1. Is concern with the category of “immigration” a double form of unintended racism? A “case study” on the uses of the “play of social categorization”**

*“(…) the study of ethnic phenomena reveals how far ethnic ideology and historical reality can diverge from each other; how much people feel things that are not there and conveniently forget realities that have existed; how people constantly take for ‘natural givens’ what they themselves have constituted in an unconscious way.” (Roosens, 1989: 161)*

**In April 1997, I was asked by the Secretaria de Estado da Juventude to draft a dossier on ethnic minorities in Portugal. It would serve as the basis for a future questionnaire on the professional and academic situation of younger members of said “ethnic minorities” — an undefined category entrusted to a High Commissioner for Migration and Ethnic Minorities (Dr. José Leitão, a sociologist and Socialist MP).**

**While analyzing census data, I quickly came to the realization that the category of “foreigner”<sup>1</sup> on which the census (determined by the**

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<sup>1</sup> A significant category because it confirmed the existence of “nationals” and even of those with no nationality; despite this, as my PhD thesis revealed, it hides the fact that there are people who do not change nationality because they can’t (in the Portuguese case, approximately 7% of adults, i.e., a few hundred thousand), and others who display “opportunistic loyalty”, i.e., their nationality only becomes important in certain circumstances (another 3% approximately) (Bastos, 1995, 2000). These categories, since they contradict current socio-political ideologies, do not appear in the census.

Government and European agreements) was based did not match either of those which led to the establishment of the recently-created High Commissioner (subordinated to the Office of the Chairman of the Cabinet) – i.e., “migrants” and “ethnic minorities”. At least a third category exists, according to different public institutions (SEF – the agency responsible for immigrants and border control – and CPR, the Portuguese Council for Refugees), which encompasses a very limited number of political refugees and asylum seekers.

Meanwhile, I discovered a database on attendance of compulsory schooling, the *Entreculturas* database, at the time managed by ACIME, the High Commissioner for Immigrants and Ethnic Minorities. In its statistical breakdown, the “lusos” were contrasted against the others (supposedly “non-lusos”), as defined by the birthplace of their parents, their condition of children of former migrants, or the ethno-racial perception of primary and secondary-school teachers who, in each school, were responsible for filling in the questionnaires (in the case of “gypsies”). These others included national categories (in the case of Portuguese-speaking peoples from former colonies, even when their numbers were quite small, as in the case of those from Macau and Timor) as well as macro-regional ones, e.g. “Indians and Pakistanis”.

At the time, I wrote that “the operational definition of ethnic minority is, as any definition, problematic; as it is so often susceptible to the suspicion of racism, in some cases justifiably so.” I also added that “the concept of ethnic identity refers to a social practice which mingles nationalism and multiculturalism. In the ‘receiving countries’, ethnic identity is constructed on the basis of processes of social interaction that define the group perception held by locals of certain groups they see as foreigners, excessively different, and, usually, poorer or culturally ‘backward’.” (Bastos and Bastos, 1999: 33). In the aforementioned text, the term ‘nationals’ referred not to the native and the naturalized, but rather to those hinted at by the “lusos” category (“white” Portuguese) – a qualifier that lacks either scientific or legal standing.

Those labelled as “ethnics” hailed mostly from the PALOP (Portuguese-speaking African Countries) and, later, Brazil and Eastern Europe. The remainder were considered “actual foreigners”: North

Americans and Canadians, Spaniards, North Europeans, Japanese, etc. who, even when grouped in associations or spatial concentrations (e.g. the British in Madeira or the Algarve, or the Japanese and North Americans in their Sintra condos), are not perceived as either "ethnics" or "immigrants".

Among the "ethnics", a further distinction was evident between "immigrants" and "gypsies". This classification, in common use among officials and bureaucrats (i.e. statisticians, social scientists, politicians, public servants, health and social security professionals, teachers, the police, etc.), bridged different agencies thereby contributing to the general confusion. Such ambiguity of definitions is fed by the fact that the categories and concepts as used "internally" (by the Home office), by those dealing with "foreigners and borders" and those charged with "migrations and ethnic minorities" are not consensual. The most extreme example of such confusion is the case of "(Portuguese) gypsies", who are particularly targeted by the "internal administration" (specifically by the police – the GNR or National Republican Guard - who persecute them as a threat to the Republic, since while "nationals", they are not seen as "lusos"). The GNR's directives make no mention of "gypsies"; rather, they singled out "nomads" requiring "careful vigilance." This persecution has resulted in the "forced nomadism" of approximately one tenth of Portuguese gypsies. "Nomadism" which in turn justifies and validates the "careful vigilance" on the part of the GNR.

Given such a degree of lack of definition in terminology, ACIME recently decided to change its name and make gypsies invisible. It is now a public company, ACIDI (*High Commission for Migrations and Intercultural Dialogue*), and with a wave of its discursive wand eliminated from Portugal's administrative categorization the classification of "ethnic minority" while introducing the intangible and fluid concept of "intercultural dialogue". Gypsies are now (as tangible and abandoned "to their fate") the charge of two bureaucrats confined to a small Office (called the GACI – Gabinete de Apoio às Comunidades Ciganas / Office for the Support of Gypsy Communities), whose public face is an Internet site with a priceless name: "SIGA-NOS"<sup>2</sup>). Relegated to a sub-level, "gypsies", supposedly organized in

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<sup>2</sup> The word "siga-nos" ("follow us") in Portuguese is a homophone of "ciganos" ("gypsies") [Translator's Note].

**“communities” that do not exist, disappeared from the public name of the organization.**

**Meanwhile, to return to the problem of detection of the organizers of the transformation of fundamental categories into a binary system (“foreigners” vs. “immigrants”), the differentiating element was clearly not related to length of stay. Rather, it depended on one’s more or less “civilized” – or integrated into “modern Western civilization” – origin (thus extending to Japan, but excluding India, China, and Brazil). The “ethnic” classification was mostly applied to the formerly colonized (sub-Saharan, North Africans, Arabs, all other Asians, as well as Spanish-speaking Americans) and, to an even inferior level, to “gypsies” who, while Portuguese, are excluded from the categories of “lusos”, “foreigners”, (ethnic) “immigrants” and, in a number of extreme cases of racism, even from human dignity and the right to life, and re-categorized at the level of “primitivism” and “animal nature” (Bastos, forthcoming).**

**Finally, and to confirm the above analysis, the statistics drafted by SEF – Serviço de Estrangeiros e Fronteiras, (Foreigners and Borders Agency) – following the periods of extraordinary regularization of illegal immigrants it promoted, produced a precious indicator which enables us to better understand why certain “foreigners” were considered “ethnics”, while others weren’t. These statistics also informally employed the category of “lusos”, which in this case incorporated all Portuguese-speaking nationals (Brazilians and PALOP) — another instance of inconsistent application of terms. In general, “ethnics”, as well as originating from somewhere colonized by some European power in the past, were supposed to be (or expected to be) “workers”; thousands of whom aspiring so greatly to this status that they had become “illegal”, and awaited the chance to become “legal”. Significantly, all the nationalities that did not appear among “illegal immigrants”, and therefore had no need for “extraordinary legalization”, were not considered “ethnic”, regardless of whether they worked or not.**

**The conceptual confusion remains great. For example, those considered Cape Verdean, speakers of the *crioulo* language as well as Portuguese, were split among three categories: many thousands were legally “Portuguese” – but not perceived as such by many “lusos”, and were frequently incorporated in “quantitative” studies on “immigrants”, even**

when they had been born in Portugal, particularly when they were living in poor housing conditions, were being resettled by local authorities, or had been moved to "housing estates"; many thousands were "foreigners" and "legal immigrants", and many thousands more were "illegal immigrants".

The situation of those coded as "Mozambican" "foreigners" in the census was even more complicated. The transition from the legal category recorded by the census to the field revealed, as well as "whites" ("retornados"<sup>3</sup> or not), many thousands of phenotypically "Indians" from various religious communities (Sunnis, Ismailis, Hindus, and Christians from Goa), as well as "Chinese" (originally from Macau, or not), which probably meant that "black" Mozambicans were a minority. Even so, social scientists usually inferred their "African negritude" based on the principle of *pars pro toto*, which tends to homogenise categories.

The great advantage for the "illegal" was that, to the naked eye, they looked exactly like "legal" immigrants — those that had been "legalized" — and even thousands of African and Asian Portuguese nationals returned from the former colonies. And all this combined to engender even more confusion in the head of many "lusos".

Briefly, we can see a "confusion of categories", rooted in the desire to establish a concentric identity structure which has as its core one of two categories: "whites" (which makes it possible to invent a "Western civilization") and the national sub-category of "lusos", i.e. the "true nationals" (or, in the Belgium discourse categories, the "autocthones" vs. the "allocthones") (Roosens, 1989).

In the case of Portugal, the identity competition with the "great", through the colonialist and imperialist modes of expansion (which became one in the final concept of "Portuguese colonial Empire"), and third-world modes of defence (which began with the exaltation of the escape of the royal family to Brazil to seek safety from the armies of Napoleon, and culminated in the exaltation of luso-tropicalism and lusophony), led — as we have seen — to the use by governmental institutions of the concept of "lusos" to incorporate those from the former colonies (supposedly, Portuguese-speaking), in order to provide, in the process of extraordinary

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<sup>3</sup> "Retornados" (or "the returned") is the collective name used for the white Portuguese who left the colonies after independence and came to Portugal; a significant number had actually been born in the colonies [Translator's Note].

**legalization, a much more favourable treatment to "lusos" than to other Africans and South Americans.**

## **2. Scientific racism, historical competition, and identity processes**

"Social theory has been shaped by this repression of certain aspects of the issue of identity. (...) The present prominence of identity politics is linked to an increasing recognition that social theory itself must be a discourse with many voices, not a monological speaking of a simple and unitary truth or its successive approximations. (...) all press theorists not only to make sense of the differences in the 'world-out-there', but to make sense of the differences within the discourse of theory. This calls on theory to take culture seriously and to approach it reflexively, not objectivistically." (Calhoun [1994] 1996: 3-4)

**The "scientific fashion" promotes increasingly contextual and synchronic micro-analyses (according to Popper, who formulated Methodological Individualism, only "individuals" exist); however, the issue of discrimination which is our subject matter has clear historical roots.**

**As the result of previous processes, the rationalist centuries (18<sup>th</sup> and 19<sup>th</sup>) may be taken as the baseline for the present analysis, since explicit intra-European competition resulted in several discourses of identity superiority, all of which attempted to legitimize military and diplomatic conquests. The latter inverted the balance of tensions between North Europeans and Mediterraneans in the favour of the former (a supremacy that was consolidated through the invention of a "better" religious option, "Protestant", than that of the "Catholic" Southerners) and resulted in British "supremacy", consolidated by the victory over Napoleon and, in the twentieth century, over Germany.**

**This process was again subverted by the ascension of the American Federation, which began with the defeat of the South, continued with the conquest of extensive territories from the Spanish Empire (a third of the US was conquered from Mexico in the 1840s), in the attempted domination of non-WASP Americas; it continued with the debt owed by democratic Europe for the double defeat of Germany, and has currently moved to a confrontation with the Asian world (first, Russian, and more recently, Arab, in its Muslim religious version) — a theatre of successive European defeats (Indochina, Algeria, etc.), and where the North Americans are not faring**

much better (a semi-defeat in Korea, a loss in Vietnam, and now the ongoing deadlocks in Iraq and Afghanistan).

All this process was intellectualized<sup>4</sup> in the 19<sup>th</sup> century by so-called "social scientists" and, especially, by those who made the largest contribution to the construction of identity hierarchies of socio-historical groups (i.e., anthropologists, both rationalists and romantics) only apparently antagonistic. "Physical anthropology", strengthened by incipient Darwinism, carried out an exhaustive effort to produce the "theory of human races" which spawned a clear hierarchical structure based on the historical situation. The "best" were "white" ("Caucasians"); however, among them, "Northerners" were "better" than the "Alpine", who in turn were better than the "Mediterraneans", a significant part of whom were classified as "mixed-race" (or, more delicately, "Lybio-Iberians"). As for the "Slavs", despite their closer proximity to the Caucasus than all other "Caucasians", no-one was ever able to understand their exact placement in this scientific stratification.

Since such a European-dominated classification did not suit the interests of North American and Australian settlers, the democrats of the ascending power choose a different approach: that of "human rights", a universalist perspective (at least rhetorically), and the construction of a national myth that gave supremacy to WASPs (White, Anglo-Saxon Protestants). This new mixed category helped explain the categories of physical anthropology: WASPs were the "Northerners", who were "Protestant", "individualistic" and "moral". "Alpines", "Slavs", and "Mediterraneans" had suffered the Catholic infection to varying degrees; therefore, they were "superstitious" and "inferior". The "Caucasians" (an unpopular, very "Euro-Asian" "centre") were thus ruled out, and the "top of the world" shifted to the North Atlantic (thus the creation of the military organisation of NATO) and showcased the new "masters of the world", which was allegedly being Americanized: an alliance of Northern Europeans (racially "superior"), English-speaking, with a "superior" religion, and sufficiently generous that they coined a political concept capable of

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<sup>4</sup> Intellectualization can be defined as a personal and socio-cultural defence mechanism that makes it possible to disguise contradictions and distresses from the "real" world, and namely socially-caused suffering (Freud, 1930), which, for identity reasons, leads to the production of more suffering (one that could be avoided, were it not the identity reasons that require its socio-historical production. As a strategy, it required the successive introduction of new categories of social actors, from philosophers to theologians, from lawyers to politicians and "intellectuals" (essayists) to a large part of "social scientists".

conceptually “absorbing” “Alpines”, “Mediterraneans”, “Slavs”, and even the “Lybio-Iberians” – the concept of “white”.

With such a generous (and self-serving) disposition, typical of “victors”, WASPs declared themselves capable of absorbing — at the lowest level of their hierarchy — all the peoples of the world, as long as they allowed themselves to be colonized, or accepted the role of slaves, becoming “immigrant workers” (slaves, when by force; or “indentured workers”, as semi-slaves bought for the lowest price possible on the free market of peripheric poverty — i.e. Asians, and Lybio-Iberians, namely the “Portuguese”); and, finally, “immigrants,” in search of white Eldorados, who would prove that much cheaper because they willingly paid for their trip, as well as for food and accommodation, and helped the lowering of wages (a process exceptionally described by Steinbeck in *Grapes of Wrath*). The process, however, began to go wrong: America became the destination for down-and-out Protestant “Northerners” (i.e. Swedes, Norwegians, Danes, Germans, etc.), and even “Catholic Northerners” such as the Irish (a contradiction in terms that had to be swallowed and elaborated), but it also received much larger numbers of Mediterraneans and Slavs<sup>5</sup>. Democracy showed its vulnerability to the dangers of demographic subversion, and the end of the first Euro-American war made it necessary to incentivize assimilation while creating legislation (in 1924) to staunch a flow that was threatening the balance of the system. The same is happening in the South today, in the Mexican territories once conquered from Spain: the panic of witnessing the peaceful re-conquest of the Southwest, undeniably becoming Spanish-speaking or bilingual — a threat to WASP supremacy, as recognized by Huntington (2004) — has led to the construction of a new Great Wall (in this case a two-thousand-mile electrified fence). And, worse, the reduction of “whites” to a minority will doubtless catalyze the creation of a new, yet unnamed category comprising WASPs, other Europeans and possibly even African- and Asian-Americans. This will in turn lead to the election of “mixed-race” representatives to inaugurate a period of truce which some, inspired by the concept of “globalization” (i.e. of peaceful, commercial Western imperialism) have attempted to denominate “post-racial era”, that

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<sup>5</sup> Non-Protestant, non-English speakers and, in the Iberian case, not really “white” either, in a country where “one drop of blood” was enough to be considered “black”.

is, one in which binary and classificatory racial discrimination will be better disguised at the discursive level of identity processes.

Since the end of the Second World War, on the other hand, Northern Europe has favoured, with a fifty-year lag, something that was not quite yet emigration: something closer to "indentured workers", ethnically "bought" from the available peripheries (Morocco, Turkey), and now known as "guest workers". They were employed in bulk (as their "ethnic" concentration shows), and expected to come on their own, with no aspiration towards local settlement and family reunion and to foster a wish to "go back where they came from" instead (since this is where their "origins" were, and were supposed to remain, as did their families). Therefore, in the Western world, they were treated simultaneously as "individuals" and as disposable workforces even though they created "ethnic communities" and "networks" to help the arrival of co-ethnics, and they had families somewhere far away, in other, "backward", "ethnic" worlds (i.e., non-white, non-civilized, non-English speaking, non-Protestant, and therefore superstitious, etc.).

The promotion of "individualism", the fashion for the establishment of the "rights" of various categories of people (the "rights of man", quite apart from the "rights of women", "children's rights", "animal rights", etc.) went hand in hand with the attempt to refer to the distant hierarchy of Courts (international, European, national, etc.) issues these cannot solve because they do not fit within the individualistic premises upon which they are conceived. As we have seen, this is a case whereby political, economic, and identity hierarchies are created of "socio-historical unities", competing for scarce (instrumental and identity) resources. These unities are capable of altering their underlying political and identity concepts, forging variable-geometry alliances<sup>6</sup> based on the play of gains and losses, and to use discourse and institutions to conceal the less-ethical dimensions of the undergoing competition.

It may seem impolite to mention this; however, a fundamental arena for this process is found in the WASP control of the social sciences – in particular in the fields of immigration, racism, and xenophobia – as well as the institutional channels apparently available to resolve a problem which is

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<sup>6</sup> As a response to the invention of new "enemies", in order to move to the military arena that which cannot be gained in internal arenas.

necessarily badly formulated, so that the evils of hierarchy-forming competition are minimized and concealed<sup>7</sup>.

### **3. Where does the European thought on the discrimination of "immigrants" come from and where is it going?**

"(...) in almost every political theory there is an inscrutable element which in the heyday of that theory goes unexamined. Behind the appearances there is a Fate, there are Guardian Spirits, or Mandates to a Chosen People, a Divine Monarchy, a Vice Regent of Heaven, or a Class of the Better Born. (...) It persisted for those thinkers of the Eighteen Century who designed the matrix of democracy. They had a pale god, but warm hearts, and in the doctrine of popular sovereignty they found the answer to their need of an infallible origin of the new social order. These was the mystery, and only enemies of the people touched it with profane and curious hands." (Water Lippmann, *Public Opinion* [1922])

"(...) we suffer increasingly from a process of historical amnesia in which we think that just because we are thinking about an idea it has just only started." (Hall, in King, 1997: 20)

**In the social sciences, any analytical distance seems impossible if we do not take into account the origins of the ideological clichés masquerading as sciences, and their identity objectives in the concealed realization of "ignored" desires (made invisible or repressed).**

**While this is not the place to delve into the subject in any depth, it is appropriate to recall that, in the specific case of "European thought" as an ideological system (or rather, as a set of competing ideological systems), it comes loaded with a weighty heritage of leading imagery, e.g. Plato's Allegory of the cave, which legitimized individualism and the philosophical idea of "good practices" [the Politics of Beauty, Truth, and Good vs. the Axis of Evil]; or Aristotle's Political Philosophy which, to the contrary, founded the paradigm of whole/part relations, while legitimizing unequal (or elitist) equality, as well as patriarchal despotism, machismo, and slavery in its more extreme forms, while at the same time describing an aristocracy of patricians from which the future democracy – organized in "Republics" – would spring.**

**The interconnection of these two "philosophical" traditions with the Christian tradition was extremely slow, and is still taking place; its**

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<sup>7</sup> Through one of the mysteries of language that "Freud explains", "minimize" is, in the operating system of a computer, the action through which one can hide (thus concealing or making disappear) for as long as needed, a momentarily inconvenient text, so that other, higher-value operations may follow their course.

**emancipatory vicissitudes are well-known, but are still far from putting into practice the high ideals displayed in Laws and Courts, in the distant Olympus of the Justice of men. With more or less Liberty, the unquestionable words – Fraternity and Equality – have been conveniently made sacred and integrated into the rhetorical rituals through which we attempt to magically erase the more extreme Hells of daily, social, and political life; namely, its inter-ethnic version (genocides, forced sterilizations, civil wars, uprisings, various terrorisms, segregations, racisms and various forms of xenophobia, extreme forms of “ethnic” poverty, etc.).**

#### **4. “Equality” in “Inter-ethnic Relations in Reversed Colonised Europe**

“(...) anthropology as a discipline and a practice is part of an imaginary that helps to reshape the relationship between the West and its Others. (...) In short, it is part of the practice of governmentality.” (Moore, [1999] 2003: 3)

**The concept of inter-ethnicity, as a political form of the identity concept, was easily accepted, chiefly since the late Sixties, to refer to the emancipatory struggle of the oppressed peoples or their migrant segments who formed community enclaves within the great “Western” cities. Acceptance of the fact that the core peoples of the world-system (Wallerstein, 1974-60) also coalesce around vulnerable identity processes has been much harder to win. These processes (which may lead to endogenous or exogenous crises) are related to the reproduction and defence of historical productions of hierarchies which falter in the face of competitive or subversive groups from the point of view of “civilised” identity and/or ethnicity. Moreover, the very idea and feeling of vulnerability of the powerful<sup>8</sup> seems to be very recent, albeit increasingly frequent in the ever more numerous essays on identity and in media analyses.**

**With few exceptions, work on ethnicity and inter-ethnic relations focuses on the strategies of dominated minorities, “tribally” segmented peoples, or migrant, diaspora and transnational “communities”, while avoiding any significant analysis of the “national” ecology in which these**

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<sup>8</sup> In our analyses, racism and xenophobia are indexes of identity vulnerability, based on identity anguish, unconscious shame and reactive anger (cf. Scheff, 1994 in Calhoun, 1996).

are inserted, and of the reactions of identity panic which are the frequent response to their presence and competitive self-affirmation.

However, the growing identity unease of North American and British "patriots", for instance, in the face of the progressive alteration of demographic, political, economic, and more directly, identity relations in "their" territories, is increasingly clear in recent texts. According to Huntington, "in the 1990s Americans engaged in intense debates over immigration and assimilation, multiculturalism and diversity, race relations and affirmative action, religion in the public sphere, bilingual education, school and college curricula, school prayer and abortion, the meaning of citizenship and nationality, foreign involvement in American elections, the extraterritorial application of American law, and the increasing political role of diasporas here and abroad. Underlying all these issues is the question of national identity" (Huntington, 2004: 9).

The identity anxiety associated to the increased fragility of the North-American WASP supremacy<sup>9</sup>, a consequence of increased non-"white" migration fluxes, the high birth rate of those minorities, their weak tendencies towards assimilation and, especially, of the "*multiculturalist movement to replace America's mainstream Anglo-Protestant culture with other cultures linked primarily to racial groups*" (idem: 171), led Huntington to strategically broaden national identity towards the regressive direction of its "Eurocentric" and "Western" "roots", depending on the rhetorical convenience of seeking – or not – allies outside the American right.

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<sup>9</sup> The "objective" data in question were clear: after three centuries of white supremacy, new and concerning perceptions are on the rise: "Whites are now a statistical minority of the population in four of the five largest U. S. cities – New York, Los Angeles, Chicago and Houston – and in larger geographical areas such as New Mexico, Hawaii, and the southern parts of Florida, Texas, and California. If current migration and birth rate continue, by about the year 2002 whites will be a minority of California's population; by about 2010, a minority of Texas's population; between 2015 and 2040, a minority of the population in Arizona, New York, Nevada, Florida, New Jersey, Maryland, and some other states; and by 2055, a minority of the U.S. population (Maharidge 1996). By about 2035, a majority of youths under the age of 19 will be persons of color (...)" (Feagin, in Abu-Lughod, 1999: 201-2). On the other hand, the exponential increase of "Hispanics" threatened old military conquests which had materialised "American superiority" over Spain and its colonies. "Mexican immigration is leading to the demographic *reconquista* of areas Americans took from Mexico by force in the 1830s and 1840s, Mexicanising them in a manner comparable to, although different from, the Cubanisation that has occurred in South Florida. It is also blurring the border between Mexico and America, introducing a very different culture, while also promoting the emergence, in some areas, of a blended society and culture, half-American and half-Mexican. Along with immigration from other Latin American countries, it is advancing Hispanisation throughout America, and social, linguistic, and economic practices appropriate for an Anglo-Hispanic society" (Huntington, 2004: 225).

**It is clear that Huntington believes that what is at stake is that “the need of individuals for self-esteem leads to believe that their group is better than other groups. Their sense of self rises and falls with the fortunes of groups, with which they identify and with the extent to which other people are excluded from their group. Ethnocentrism (...) is the logical corollary to egocentrism” (idem: 25). This is a simplistic theory, which requires the contribution of different – and less central to the world system – identity positions; however, as a political scientist, Huntington recognises an identity dimension which tends to elude interactionist, situationist and constructionist psychologists and sociologists; a dimension which however, since the works of Freud, Erikson and Tajfel, has been clear to the theorists of identity processes: that groups can function as significant identity extensions of personal identities, thus receiving emotional investment; and that significant victories or humiliating defeats of the group – in military, political, technological terms, or even merely in sporting events – result in significant variations of identity emotions, even of personal self-esteem, in a large number of subjects, and that this even truer when these victories or defeats are, in “realistic” terms, unexpected.**

**The real or phantasmatic expectation of an imminent identity defeat of WASP supremacy within America itself leads Huntington to foresee, as one of the available reactive hypotheses, that “the various forces challenging the core American culture and Creed could generate a move by native white Americans to revive the discarded and discredited racial and ethnic concepts of American identity and to create an America that would exclude, expel, or suppress people of other racial, ethnic, and cultural groups. Historical and contemporary experience suggests that this is a highly probable reaction from a once dominant ethnic-racial group that feels threatened by the rise of other groups. It could produce a racially intolerant country with high levels of group conflict” (idem: 21). However, he also suggests a further alternative. He writes, “the dissolution of the Soviet Union eliminated one major and obvious threat to American security and hence reduced the salience of national identity compared to subnational, transnational, binational and other-national identities” and takes it as given that “historical experience and sociological analysis show that the absence of an external “other” is likely to undermine unity and**

**breed divisions within a society” (idem: 18). He believes that America will find the “enemies needed” to the survival of its supremacy, by transferring to the religious level all agonistic and confrontational tension; however, he considers that it “is problematic whether intermittent terrorist attacks and conflicts with Iraq or other ‘rogue states’ will generate the national coherence that twentieth-century war did” (idem: 18).**

## **5. On the political good and bad will of European governments in identity competition**

“The concurrent invocation, in nation-states’ rethoric and praxis, of national sovereignty and universal human rights engenders paradoxical correlations. This means, for one thing, an incongruity between the normative and the organizational bases of rights. (...) A similar disparity appears between two constitutive aspects of citizenship – identity and rights.” (Soysal, 1994: 8)

**Stating that discourse and its institutions (such as Courts) are quite different from political practices is nothing new, especially when it comes to the degrees of discrimination between “autochthonous” and the “immigrants” who are necessary to the economic development of Europe, if it is to compete with the other great socio-historical actors on the plane of identity.**

**European reports are brimming with statements on the various degrees of resistance from many national government to the implementation of “directives” which, despite their weakness, are not ratified or implemented because it is –rightly or wrongly – believed that they would shock local “public opinion”, namely the WASPs, defeated and humiliated by the most recent history that led to the creation of the great Anglo-American – or WASP –empire, the only great empire, whose power stems from the fact that it has not been publicly formalized, and therefore cannot be referenced as the main actor of the political-moral history of modern times<sup>10</sup>.**

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<sup>10</sup> The WASP Empire is invisible because so it suits both parts: it hides the current subalternity of the UK to the US – and impedes the mourning for the loss of the “Empire where the sun never sets”; while to the Americans, making the Empire they always aspired to an invisible one has enabled them to destroy the European Empires in the name of high moral principles, while setting up an Empire with indefinite and unlimited borders and subjects, announced by the social scientists who were its mouthpieces, initially under the name of “Americanization” of the planet (Lippmann, 1922, Morin, 1964). In post-modern times, also due to the resistance to such unscrupulous marketing, we have witnessed the re-launch of the Anglo-Americanization of the planet, now under the guise of “globalization”, a new, post-historical “Liberal” version (Fukuyama, 199 ) for international political marketing, translated into the idiom of light culture (a post-political WASP culture, devoid of conflicts, and focused upon morals, bodily health, and the planet’s well-being).

**Table 1 – The MIPEX rankings (2007)**

<b>RANK</b>	<b>COUNTRY</b>	<b>TOT</b>	<b>AD</b>	<b>RANK</b>	<b>COUNTRY</b>	<b>TOT</b>	<b>AD</b>
1 [1]	<b>Sweden</b>	<b>88</b>	<b>+ 6</b>	14 [13]	<b>Ireland</b>	53	+ 5
2 [2]	<b>Portugal</b>	79	+ 8	[17]	<b>Germany</b>		- 3
3 [9]	<b>Belgium</b>	69	+ 6	16 [24]	Switzerland	50	- 17
4 [5]	<b>Netherlands</b>	68	+ 13	17 [3]	<b>Hungary</b>	48	+ 37
5 [9]	<b>Finland</b>	67	+ 8	[27]	<b>Czech Republic</b>		- 21
6 [3]	Canada	65	+ 20	19 [28]	<b>Estonia</b>	46	- 23
[11]	<b>Italy</b>		+ 4	20 [19]	<b>Lithuania</b>	45	+ 3
8 [16]	Norway	64	- 10	21 [20]	<b>Poland</b>	44	+ 2
9 [5]	<b>United Kingdom</b>	63	+ 18	[24]	<b>Denmark</b>		- 11
10 [17]	<b>Spain</b>	61	- 11	23 [23]	<b>Malta</b>	41	- 3
11 [5]	<b>France</b>	55	+ 26	24 [13]	<b>Slovakia</b>	40	+ 18
[5]	<b>Slovenia</b>		+ 23	[21]	<b>Greece</b>		+ 4
[15]	<b>Luxembourg</b>		+ 1	26 [12]	<b>Cyprus</b>	39	+ 21
<b>MIPEX-28</b>		<b>54</b>	<b>+ 5</b>	27 [22]	<b>Austria</b>	39	+ 3
<b>EU - 25</b>		<b>53</b>	<b>+ 5</b>	28 [24]	<b>Latvia</b>	<b>30</b>	<b>+ 3</b>

This is not the place to write a history of the European Union, or to analyze the resistances registered in reports. We can however make use of an instrument that is as desirable for scientists, as it is vexing – and even threatening – to “national prides”, because it subverts the politico-scientific hierarchies taken as a given by “neo-evolutionists” and the “globalized”: the recently-published Migrant Integration Policy Index (MIPEX, 2007).

Gypsies or Romani peoples are the target of generalized discrimination in Europe, and as has been noted are rendered invisible by such a strategy of categorical differentiation between “immigrants” and “ethnic minorities” (something the largest groups or migrants are or will be). Portugal is one of the countries in which gypsies receive the worst treatment; despite this, MIPEX awards it second place, among 27 European countries and Canada, 19 points (out of a hundred) above the average of the

**15 Western countries of the EU, and 26 points above the average of EU-25 (before the entry of Romania and Bulgaria), 18 points above Spain and well before other much richer countries: 29 points above Switzerland (16<sup>th</sup>), 35 above Denmark (21<sup>st</sup>), 39 above Greece (24<sup>th</sup>) and 40 above Austria (26<sup>th</sup> out of 28).**

**However we are not questioning the fact that Sweden and Portugal having such a clear advantage over the remaining countries makes it clear that identity processes associated to immigration and inter-ethnicity are a favourable alternative arena for “small” countries in their competition with the “great”, independently of economic or educational rankings. Since the defeat of the Spanish colonial empire and of the projected German colonial empire, Portuguese identity competition, other than with Spain, is with the United Kingdom. This competition has resulted in enlightening identity debates between immigrants of Indian origin from Eastern Africa, who currently live out their identity competition in the ethnic suburbs of London and Leicester (Bastos and Bastos, 2005, 2007). This ranking awards Portugal one more rhetorical victory. Despite its lack of a colonial empire, Sweden competes by becoming the European champion of anti-discrimination of immigrants or, more precisely, of anti-racism. So much so, that it voluntarily imports thousands of political refugees and gypsies — the latter no doubt in repentance of the former extermination attempt through forced sterilization (Westin, forthcoming). And it thus imparts a “civilizational” lesson to the Germans, forever embroiled in their identity contradictions, as well as to all other former colonizers.**

**We are however not questioning the work of our colleagues, politicians, lawmakers and scientists, who have constructed the MIPEX. To the contrary, it seems like a very well devised scientific project, which makes it possible for us to understand the utility of scientific work, when conceived in this fashion<sup>11</sup>.**

**Three things can be inferred from an analysis of the MIPEX results. Firstly, MIPEX makes it clear that, independently of official discourses (Universal Declarations of Rights, etc.) and the institutions that, for the lack of other powers, uphold them (international organizations as the UN, the**

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<sup>11</sup> As well known since the 20s, conceptual “framing” is fundamental to ideological positioning, since the construction of any “figure” hides all other variables and facts, which become indistinct and irrelevant in an invisible “ground”.

central institutions of the European Union, the world of Law and Courts, etc.), huge strategic and behavioural differences exist between European countries in the matter of discrimination, racism and xenophobia (i.e., intolerance towards non-Whites, even when "nationals" as is the case with "ethnic minorities", namely "gypsies"). And that such variations do not correspond to "civilizational" rankings that structure the world system around the centrality of Anglo-American elites, to the dimensions of each country, or their more or less recent entry into the European Union, or yet to their being in the North or South, East or West; rather, their explanation may be found in the History of inter-national identity competition, with multi-item rivalries (among which rivalry between neighbours factors heavily, one that Freud called the "narcissism of small differences" or the cleavage we detected between instrumental and moral rivalries).

Secondly, we shall note the efficiency with which categories are manipulated in order to disguise "vexing situations"<sup>12</sup> that markedly contrast with these data, in the case of countries with a more favourable ranking. The distinction between "immigrants" and "ethnic minorities" and their thematic treatment is entirely artificial, and perpetuates the early-20<sup>th</sup> century American discourse at its roots. The many thousands or millions who constitute, in each country, the largest groups of ethnic (non-White) migrants<sup>13</sup> are already multi-generational settlers, and are already— or are rapidly becoming – actual "ethnic minorities". This fact paralyzes European governments, confronted with the "vexing" evidence that the European

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<sup>12</sup> The pre-concept of "vexing" is an index of rationalist positions and their impasses. Max Weber introduces the pre-concept concerning "nationality" and "ethnicity", but he is incapable of incorporating it theoretically because it falls outside the premises of his intellectual system ("which can then be delirante", as Freud 1913 recalls, as historical forms of social organization. "The concept of the 'ethnic group', which dissolves if we define our terms exactly, corresponds in this regard to one of the most vexing, since emotionally charged concepts: the nation, as soon as we attempt a sociological definition." (Guibernau and Rex, 1997: 24). The impotence of (rationalist) sociology to analyse historical, inter-ethnic, social and political identity processes could not be better exposed; thus a new analytical space is opened, for a new sociology which connects emotions, identity processes and inter-ethnic relations (Scheff, 1994).

<sup>13</sup> Such issues have been concealed to a lesser degree by both the British and the Americans, who have appropriated theories of "race relations", i.e., between "Whites" and "non-whites" (initially, "Masters" and "former slaves", "Whites" and "Blacks". As to "Gypsies", categories were manipulated in order to make them disappear in the amorphous and naturalist mass of "travellers" (Okely, 1983); or an attempt was made to demonstrate that they never existed, at least in the Anglo-American world (Belton, 2005). Since they are neither Black nor White, they have no place in a world where races are binary; they never were subjects of Her British Majesty, like the "browns" of India and the Antilles (Hall, 1992) or the "yellows" defeated in the Opium Wars, or the "reds" such as "Native Americans". All these disappeared from the world of those who suffer from selective ethnic colour blindness to those who have an undefined colour, and thus escape the definition promoted by colour lines and/or struggle to fit in the rankings of competing religions.

**states of today are plural states — regardless of whether this fact is recognized by scientists and politicians. Between the promotion of multiculturalism and its current disappearance in the Netherlands, Denmark, and the UK, it is high time for those voters who buy into the WASP discourse to react coherently to the ideas of identity superiority instilled by previous generations (the engines “of the infernal machine” mentioned by Scheff), to create anti-(non-White) immigration parties, and to promote current social conflicts (“triggers”, according to the same theory) to increase their own electoral power. The recent disappearance of the Communist framework for workers has made new identity banners available to many of them, in blatant contradiction to their former internationalisms; the latter have thus been revealed as merely rhetorical and strategic.**

**Thirdly, MIPEX exposes the economy of separation between the political governance that solves social issues, and that which conceals and postpones the social problems it does not intend to resolve because they are in conflict with the identity beliefs of “racial”, civilizational, and national superiority” and rather, displaces them to rhetorical arenas and those of juridical and “moral” competence<sup>14</sup>. MIPEX may therefore offer convenient parameters (which enables us to analyze the failures of this approach, and what it hides) and highlight “good practices”<sup>15</sup> that others will only adopt if they wish to compete on the same identity board (as is the case of Hungary, whose “bad practices” towards Romanis are well known, and who takes 17<sup>th</sup> place in the general ranking, but ranks 3<sup>rd</sup> when only anti-discrimination measures are considered<sup>16</sup>. This shows that “declarations of rights” and the drafting of laws do not alter cultural patterns that “express” a view of the value of “national identity” in the ranking of the History of Identity**

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<sup>14</sup> That is, to Justice which, as well known, owes its existence to the creation of Justice Ministries and courts which should be merely supplementary, and become instead the best disguise of racism and political ill-will to resolve issues which are still governed by the old rationalist pride of the past.

<sup>15</sup> The ideology of “good practices” is the result of a combination of religious discourse with that of the civilizing Enlightenment discourse, upon which the missionary and “educational” practices of colonialism were based. As such, it also is highly gratifying to the “WASP” or “merely White” identity discourse, since it expects two contradictory effects to take place: to prove that “exemplary peoples” exist, whose “Good practices” must be followed (North Americans are specialists of this strategy, and capable of introducing 180-degree changes in their discourse to maintain the illusion that they are the moral leaders of the world – be it by attacking the “Axis of Evil”, or by becoming – on their own – the “Axis of Good” as due to the Obama effect).

<sup>16</sup> Hungary, together with the Czech Republic and Slovakia, are currently under trial for cases of forced sterilization; moreover, Hungary has recorded multiple cases of attacks to gypsy villages and homes, targeted with Molotov cocktails; when their inhabitants flee, they are shot at with machine guns. The Courts do nothing.

**Competition. This is a branch of Political History and Science that should be created anew, despite all "scientific" resistance to all that is not 'objective', cannot be "defined operationally" in order to be "measured" and "factorialized", and therefore exceeds the narrow barriers of positivist cognition as formulated by Popper, and individualist<sup>17</sup>.**

**MIPEX is a good example of the work of current post-modern sociologists (Giddens); the economy of the decision to separate recent and long-term immigration becomes easily comprehensible. The latter led to the formation of "ethnic minorities", such as the Romani/gypsies. The perception of governmental "good practices" is thus greatly enhanced. Should the same countries be classified in a ranking relating to these "long-term immigrants", with pertinent indicators and in comparison with the ranking on "immigrants"; or if this ranking had included gypsy Europeans as (long-term) immigrants, all scores would have been markedly lower. We can therefore hypothesize that such rankings have lost contact with reality, and that they attempt to construct a convenient juridical-scientific fiction.**

**A number of countries have very good practices (with Sweden and Portugal in evidence); if their example is followed – namely by the ten recently-admitted countries, who have on average 16 points less than the 15 initial countries – Europe can become exemplary (a legitimate identity aspiration). It is of course desirable that Germany, Ireland, Switzerland, Denmark, Greece, and Austria should alter their standards; however, the report gives no pertinent ("Scientific") information as to the socio-historical or cultural causes of such "lag". On the other hand, these countries can ignore the ranking since, according to Weber and Popper, the study could only be truly sociological and really scientific if it had been carried out at the level of individuals (no-one is sure how, but "experimental" suggestions are**

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<sup>17</sup> The greater political advantage of the positivist strategy is not the construction of "knowledge", but rather the way in which it blocks or destroys the "knowledge" that threatens WASP identity policies. Should MIPEX data prove to be "vexing", there is the possibility of discrediting the ranking with the support of Anglo-Austrian rationalist epistemology (Gellner, 1985) since, according to Weber and Popper, the study could only be truly sociological and really scientific if it had been carried out at the level of individuals (no-one is sure how, but "experimental" suggestions are welcome), while this study incurs in the grave fallacy of "methodological nationalism" (Wimmer). Methodological nationalism actually is the political contradiction at the root of the UE; however, no one has yet been capable of inventing a Europe made of 450 million "individuals", not even through political instruments such as "methodological individualism", "situationism", or "constructivism", or by dreaming of "borderless" transnational models or "liquid societies" (Baumann). The history of identifications and historical identifications are neither easily not rapidly erased, and only a handful of optimistic and mentally omnipotent sociologists (namely, North American), who take models and ideals for realities, think otherwise.

welcome), while this study incurs in the grave fallacy of "methodological nationalism" (Wimmer).

**6 Promoting a Better World, politically organized, that is not merely constituted of "individuals": from ethnic rankings, to positive discrimination as a form to obtain Justice and increase social cohesion**

"(...) social theory – and indeed several humanistic disciplines such as anthropology, geography, and literary criticism – became extremely self-reflexive and sceptical about their disciplines, or any other disciplines, could say about one's own or another's society. Concerns were increasingly expressed about how any such analysis invariably involved particularistic and sometimes oppressive assumptions, masquerading as universalistic truths about human nature, reason or modernity." (May, Modood and Squires, 2004: 2)

**We can advance, as a general cognitive principle, the political hypothesis (unacceptable to Popper) that the countries who do not recognize their historical mistake cannot correct them. As its corollary, those who wish to make the world a better place by detecting the model of "good practices", while avoiding the recognition of their own mistakes, are merely attempting to "forget their questionable past" and increase their asymmetrical power. In other words, those who promote policies which are "non-refutable" is attempting to deceive someone (and we know who, and why); this is particularly true when we consider the hypothesis that unconscious shame is the dynamic foundation of the social violence of the dominant, or aspiring to be so (Scheff, 1994).**

**On the other hand, there are politicians and social scientists who aspire to improve social reality instead of idealizing ideals and judicial devices associated to liberal individualist concepts. And this marks the passage from negative discrimination to a different form of "unequal treatment": positive discrimination.**

**Policies of positive discrimination have been a tool of the UE under construction to reduce economic and social asymmetries between richer and poorer countries. At the national level, they have been used to overcome regional asymmetries and excessive social asymmetries at the level of the poorer or more "civilizationally backward"<sup>18</sup> families and individuals; they**

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<sup>18</sup> The concept of excessive asymmetry is operative, although it may be defined as a function of different parameters in different times, "cultures", and places.

have worked both as a corrective of the "category" system, and to compensate these people and their families.

In a different context – namely, India – they have also been used to overcome multi-secular cultural discrimination against "untouchables" and "tribals", forbidding their discrimination in the access to public places and setting up quotas for these "categories" of "nationals", with dazzling and still-evolving results.

Following the impact of the identity politics of the New Left, and the monitorization of situations of negative discrimination, processes of positive discrimination have also been promoted in certain US states (e.g., California), in favour of African-Americans, "woman", and other gender minorities (gays and lesbians), all considered to be historically disadvantaged "categories". The election of Barack Obama as President can be considered as the main consequence of this process.

#### **6.1 Positive discrimination as a form of political action within the UE to increase inter-ethnic social cohesion**

In our post-rationalist perspective, what really matters is increasing inter-ethnic social cohesion, in order to gain ground against "white" nationalisms, racism, and xenophobia. And the first means to increasing inter-ethnic social cohesion rests in an alteration of the category system, through campaigns to discourage discrimination between "autochtones" or locals, "foreigners", "immigrants", "ethnic", "religious", and other "minorities". This requires the surmounting of centuries-long "categorization" devices at their roots, which frequently inflamed them into confrontations or genocides. This is only possible through the acquisition of a post-classical vision of the world (post-Aristotelian, post-Platonic, and post-Roman); therefore, through a profound revision of political, judicial, philosophical, ideological, and moral discourses, and the critical revision – or the critical abandonment – of many of the identity "concepts" accumulated in the refuse of intellectual History, since these support – openly or indirectly – the "Politics of superiority" which create epidemics of identity subalternity and marginalization which still lack effective vaccines. Policies of respect, historical repentance, reconciliation and integration are – paradoxically – the pre-condition and the result of the destruction of the

vicious circle of historical superiority ambitions that hold back the civilizational process (in a post-WASP sense, totally unconnected to the concept of "Western civilization" as the emblem of White Pride).

As Roosens recalls, "being taken seriously or being respected is a social value, that has equal or even more standing in matters of ethnicity, and the claim for material goods runs through this channel of recognition and respect" (1989: 159). And we would add that this social value is a basic identity value that can't be granted by tribunals, a social value that links personal identity to ethnic or ethnicized identity in the arena of inter-ethnic relations.

A second means to congruent positive discrimination rests in the public clarification of the hierarchies of historical degradation, inter-ethnic impoverishment and marginalization, and in the promotion of corrective policies. These should begin with those who are the target of the most serious ethnic discriminations, both because of their condition, and because the policies of exclusion can only be stopped by a political and moral break with the identity beliefs that underlie them.

It so happens that in Europe, the most excluded and impoverished are neither "foreigners" nor "immigrants"; rather, they are an ethnic segment of European citizens – the Romani or "gypsies" of Europe (approximately 2% of European nationals). They are the target of a contradictory mixture of ethnic invisibilization – or reduction to the status of "individuals", projects of assimilation, processes of romantic folklorization, processes of accumulation of media and popular accusations (with great responsibility of the bureaucrats who "work in the field"), and more or less discreet genocidal projects (Bastos, 2007; Bastos, forthcoming).

#### **6.2 Positive discrimination associated to projects of affirmative action and empowerment of marginalized and/or excluded "minorities"**

Gypsies (Romani) were taken *manu militari* from North-eastern India, were enslaved under the Ottoman Empire and its vassal principalities (namely, Romenia), and constituted the bulk of European slaves since the 14<sup>th</sup> century (Hanckok, 1987). Thus they became the (mainly Eastern) European equivalent of black North-Americans, albeit for a much longer time

span (Bastos, forthcoming)<sup>19</sup>. This may help us to understand that, in the USA, the WASP vs. blacks conflict has been opened and politically and/or morally thought, while the inter-ethnic conflict between (white) Europeans and (Romani) gypsies still is relatively unrevealed, even within the European Union.

Their exclusion from the category of «migrants» (using the same categorical strategy of the Governments referred in the MIPEX) do not allow that IMISCOE as a collective of researchers in social sciences can be aware of the discrimination collectively acted upon them in the long term and in actuality and use this extreme case to the advance of theory.

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<sup>19</sup> Recent data reveal that gypsies were (1) repeatedly kidnapped from North-East India by “Turkish” (Ghaznavid) military expeditions at least since the winter of 1019-1020, when over 50,000 inhabitants of the holy city of Knnauj were defeated and sold as slaves in the Khorasan (Persia) market, an event recorded that same year by a participant in the military *razzia* (Clanet dit Lamanit, 2007); (2) in Romania, where the highest demographic concentration is still present (25% of all gypsies), they were enslaved since 1330, a situation that was only altered in the second half of the 19<sup>th</sup> century; (3) In Western Europe, where few took refuge since about 1400, and after a period when they were treated as foreign nationals on a pilgrimage to Santiago de Compostela, they became – for three hundred years – the target of combined attempt to forced assimilation and genocide, the worst such examples in European history together with the horrors of Jesuit Inquisition against the Jews (Hanckock, 1987; Bastos *et alii*, 2006; Bastos, 2007; Bastos, forthcoming); (4) currently, all opinion polls and reports on racism and xenophobia show that gypsies are the target of serious crimes, concealed by national governments; they are also the most serious case of racism and xenophobia all over Europe, in proportions that are at least double those of aversion to “blacks” (in Portugal, in a recent study, under 30% vs. more than 60%).

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