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Article

The Legacy of Portuguese Miscegenation: Race, Social Stratification, and Brazil's Path to Development Compared to the United States

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Abstract: The colonization practices of Portugal, particularly its early and continuous encouragement of miscegenation, have profoundly shaped Brazil's social and racial landscape. This resulted in a racially mixed society with intricate social hierarchies where race, skin color, and socioeconomic status are deeply interwoven. Unlike the United States, which enforced strict racial boundaries through anti-miscegenation laws and a rigid binary classification of race, Brazil developed a more fluid and complex system of racial identification. This article delves into how Portuguese miscegenation influenced Brazil's racial identity and the formation of its elite, examines societal reactions to racial mixing, and contrasts these dynamics with those of the United States. By analyzing historical contexts, incorporating census data, and reviewing contemporary studies, the discussion highlights the systemic marginalization of Afro-Brazilians—who make up over half of the country's population—and how this exclusion impedes national development. The article argues that systemic racism is a critical barrier to Brazil's progress, potentially more detrimental than economic inequality and corruption, and emphasizes that integrating Afro-Brazilians is imperative for the nation to realize its full potential.

Keywords: Portugal; miscegenation; United States; marginalization; economic development

Section 1. Introduction

The historical processes of colonization have left indelible marks on the racial and social structures of nations across the globe. Portugal, a pioneer in maritime exploration during the Age of Discovery, established an extensive empire, with Brazil emerging as its largest and most significant colony. Confronted with the challenges of administering vast territories with a relatively small European population, Portugal adopted a colonial strategy that not only permitted but actively encouraged miscegenation—the intermarriage and unions between Portuguese settlers and indigenous or African peoples. This approach was instrumental in fostering social cohesion and facilitating control over the colony, leading to the development of a racially diverse society characterized by complex social hierarchies and subtle, yet pervasive, forms of racism.

In stark contrast, the United States, another nation that heavily relied on enslaved African labor for its economic development, pursued policies that discouraged miscegenation and enforced strict racial boundaries. Anti-miscegenation laws and the “one-drop rule” codified a binary racial system, sharply delineating the Black and White populations and institutionalizing racial discrimination.

This article seeks to explore the profound impact of Portuguese miscegenation on Brazil's social and racial structures. It examines the formation of a mixed-race elite, the societal reactions to racial mixing, and the ways in which these factors have shaped contemporary Brazilian society. By contrasting Brazilian racism—which is often intertwined with class and manifests in more subtle ways—with the overt, legally codified racism historically present in the United States, the article provides a comparative perspective on how different colonial strategies have long-term implications for racial dynamics.

Furthermore, by incorporating data from the Brazilian census and drawing on scholarly research, the discussion underscores the systemic marginalization of Afro-Brazilians. Despite constituting more than 50% of the population, Afro-Brazilians continue to face significant barriers to social mobility, access to education, and representation in positions of power. This exclusion not only perpetuates social injustice but also hinders Brazil's development by wasting the potential contributions of a substantial portion of its population.

The article argues that systemic racism in Brazil may pose a more significant obstacle to national progress than corruption and economic inequality. While these issues are deeply interconnected and collectively impact development, the persistent marginalization of Afro-Brazilians has far-reaching implications that affect every facet of society. Addressing this systemic exclusion is not only a moral imperative but also a strategic necessity for Brazil to achieve sustainable development and compete effectively in the global arena.

Section 2. Discussion

Section 2.1 Portuguese Miscegenation and the Formation of a Racially Mixed Elite

Portugal's colonization strategy in Brazil was profoundly influenced by its limited demographic resources and the logistical challenges of governing an expansive territory across the Atlantic. Unlike other colonial powers that sought to transplant large populations to their colonies, Portugal relied on a relatively small number of settlers to establish and maintain control. To compensate, the Portuguese Crown encouraged miscegenation as a pragmatic solution to foster alliances, integrate indigenous populations, and strengthen social cohesion within the colony.

From the earliest days of colonization, Portuguese male settlers formed unions with indigenous women, a practice that was often formalized through marriage or informal relationships. With the introduction of African slaves into Brazil beginning in the 16th century, these unions extended to African women as well. The offspring of these relationships, referred to as "mestiços" (mixed-race individuals), became a significant demographic group within colonial society (Freyre, 1933).

Gilberto Freyre's seminal work, *Casa-Grande e Senzala* (The Masters and the Slaves), emphasizes the role of miscegenation in shaping Brazilian society (Freyre, 1933). He posits that the blending of European, African, and indigenous cultures and peoples was foundational to the development of Brazil's national identity. While this perspective has been both influential and controversial, it underscores the centrality of racial mixing in Brazil's history.

The mestiços occupied various roles within the colonial social structure. Those who assimilated into Portuguese culture, adopted Catholicism, and distanced themselves from indigenous or African customs were often able to attain higher social status. Some even entered the ranks of the colonial elite, holding positions in administration, commerce, and the military (Alencastro, 2000). However, this ascent was frequently contingent upon emphasizing their European ancestry and minimizing their connections to marginalized racial groups.

This emphasis on whiteness and European heritage was a response to the pervasive stigmatization of African and indigenous identities, which were associated with slavery, subjugation, and lower social status. The colonial elite cultivated an image of cultural and racial superiority, reinforcing social hierarchies that privileged European norms and aesthetics (Schwarcz, 1993).

Section 2.2 Societal Reactions and the Exacerbation of Racial Distinctions

While miscegenation was a prominent feature of Brazilian society, it did not eliminate racial prejudices or the establishment of a hierarchical social order based on race and skin color. Instead, it led to a complex stratification system where subtle gradations of skin tone and racial ancestry played significant roles in determining one's social position.

The colonial and post-colonial elite became increasingly concerned with maintaining social distinctions that favored whiteness. Lighter skin and European features were associated with higher status, education, and economic opportunity. This association reinforced societal preferences for

whiteness and perpetuated discriminatory practices against those with darker skin tones (Nogueira, 1955).

In the late 19th and early 20th centuries, Brazil underwent a series of nation-building efforts that included attempts to “whiten” the population through policies promoting European immigration. This ideology, known as *branqueamento* (whitening), was rooted in the belief that the country’s progress depended on increasing the proportion of European-descended individuals and diminishing the influence of African and indigenous cultures (Skidmore, 1974).

The intellectual and political elite embraced theories of scientific racism prevalent in Europe and the United States, which posited a hierarchy of races with whites at the top. These ideas were disseminated through academic institutions, literature, and public policy, further entrenching racial biases (Schwarcz, 1993).

Despite the promotion of racial mixing as a means of cultural integration, the underlying goal was often the assimilation and eventual disappearance of non-white characteristics within the population. This paradox highlights the contradictory nature of Brazilian racial dynamics, where miscegenation was both celebrated as a national characteristic and utilized as a tool for reinforcing white dominance.

Section 2.3 Contrasting Racial Classifications in Brazil and the United States

The divergent approaches to race and miscegenation in Brazil and the United States have led to markedly different systems of racial classification and manifestations of racism. In the United States, anti-miscegenation laws were enacted as early as the 17th century, prohibiting marriage and sexual relations between whites and non-whites. *The “one-drop rule,” a social and legal principle asserting that any person with even one ancestor of African descent is considered Black, reinforced a strict binary racial system* (Davis, 1991).

This rigid classification facilitated the institutionalization of racism through laws such as the Jim Crow laws, which enforced racial segregation and discrimination. The clear delineation between Black and white populations made racism overt, codified, and legally sanctioned.

In contrast, Brazil’s history of miscegenation led to a more fluid and ambiguous system of racial classification. Racial identity in Brazil is often determined by a combination of skin color, physical features, socioeconomic status, and cultural practices. The Brazilian census includes multiple categories for race and color, such as “branco” (white), “preto” (Black), “pardo” (brown or mixed), “amarelo” (yellow), and “indígena” (indigenous) (IBGE, 2011).

This multiplicity of categories has contributed to the partial myth of “racial democracy,” a concept popularized by Freyre (1933), which suggests that Brazil is free of racial prejudice and discrimination due to its history of racial mixing. However, scholars have critiqued this notion, arguing that it obscures the persistent inequalities and racism faced by Afro-Brazilians (Nascimento, 1978).

The subtlety of Brazilian racism, often manifested through social exclusion and economic disparities rather than overt legal discrimination, makes it more challenging to identify and address. *The lack of clear racial boundaries allows for the denial of racism’s existence, hindering efforts to implement policies aimed at promoting racial equality.*

Section 2.4 The Nuanced Nature of Brazilian Racism

According to data from the 2010 Brazilian Census, 50.7% of the population identified as Black (“preto”) or brown (“pardo”), reflecting the extensive racial mixing that characterizes the nation’s demographic composition (IBGE, 2011). Despite this numerical majority, Afro-Brazilians are disproportionately represented among the lower socioeconomic strata and face systemic barriers to advancement.

Brazilian racism operates through mechanisms that are often subtle and entrenched within social institutions. Discrimination manifests in limited access to quality education, healthcare disparities, discriminatory hiring practices, and underrepresentation in positions of power and influence (Silva

& Hasenbalg, 2000). The association of whiteness with wealth, education, and modernity reinforces social hierarchies that marginalize Afro-Brazilians.

One of the challenges in addressing racism in Brazil is the pervasive denial of its existence, fueled by the ideology of “racial democracy.” This belief posits that Brazil, unlike other societies, is free from racial prejudice due to its history of miscegenation and cultural syncretism (Fry et al., 2007). However, empirical studies have demonstrated significant racial inequalities across various indicators, debunking this myth.

Afro-Brazilians often experience what has been termed “cordial racism,” where discriminatory attitudes and practices are masked by politeness and the absence of overt hostility (Guimarães, 1999). This form of racism is insidious, as it perpetuates inequality while avoiding direct confrontation, making it difficult to challenge and dismantle.

Section 2.5 Impact on Afro-Brazilian Rights and Social Mobility

The systemic marginalization of Afro-Brazilians has profound implications for their rights and opportunities, as well as for Brazil’s broader social and economic development. Afro-Brazilians face significant disparities in income, education, employment, and health outcomes, which perpetuate cycles of poverty and exclusion.

Data from the Pesquisa Nacional por Amostra de Domicílios Contínua (PNAD Contínua) or, *National Sample Continuous Research*, indicates that, in 2018, the average monthly income of white Brazilians was approximately 73.9% higher than that of Black and brown Brazilians (IBGE, 2019). This income gap reflects structural inequalities in access to well-paying jobs and career advancement opportunities.

Educational attainment among Afro-Brazilians lags behind that of white Brazilians. In 2016, only 12.8% of Black and brown individuals aged 25 or older had completed higher education, compared to 26.5% of whites (IBGE, 2018). Barriers to quality education include underfunded schools in predominantly Black neighborhoods, racial biases in educational institutions, and socioeconomic constraints.

Afro-Brazilians are underrepresented in professional and managerial positions and overrepresented in low-wage, informal employment sectors. They often face discrimination in hiring and promotion practices, which limits career progression and exacerbates income disparities (Heringer, 2002).

Afro-Brazilians also experience poorer health outcomes, with higher rates of chronic diseases and lower life expectancy compared to whites. Access to healthcare services is hindered by socioeconomic factors and systemic discrimination within the healthcare system (Paixão & Carvano, 2008).

The cumulative effect of these disparities *is a significant underutilization of human capital*. By excluding a substantial portion of its population from full participation in economic, political, and social life, *Brazil undermines its own development potential*.

Section 2.6 Racism as a Barrier to Development

The exclusion of Afro-Brazilians from quality education and employment opportunities results in a loss of potential productivity and innovation. A diverse workforce enhances creativity, problem-solving, and competitiveness, which are essential for economic development in a globalized economy (Hunt et al., 2015). By not fully integrating Afro-Brazilians into the economy, Brazil is forgoing the talents and perspectives that could drive growth.

Persistent racial discrimination undermines social cohesion, leading to social tensions, unrest, and instability. Societies that embrace inclusivity and diversity are better positioned to pursue long-term development goals and maintain social harmony (Putnam, 2007). The marginalization of Afro-Brazilians contributes to divisions that can hinder collective efforts towards national progress.

Health disparities and limited access to healthcare services for Afro-Brazilians affect overall human development indices. Lower life expectancy and higher morbidity rates among marginalized

populations reduce the average human development outcomes for the nation (UNDP, 2019). Addressing these disparities is crucial for improving the quality of life for all citizens.

Brazil's reputation on the international stage can be influenced by its human rights record and commitment to equality. Persistent racial inequalities may deter foreign investment and affect diplomatic relations, as global partners increasingly prioritize corporate social responsibility and ethical considerations (World Bank, 2013).

In this context, combating racism is *not only a moral imperative but also an economic necessity*. Policies aimed at promoting racial equality can have a multiplier effect, enhancing economic performance, social stability, and international standing.

Section 2.7 Comparative Opportunities in the United States

In the United States, despite a history marked by slavery, segregation, and systemic racism, deliberate efforts to address racial inequalities have led to significant progress in integrating African Americans into various sectors of society. Landmark civil rights legislation, affirmative action policies, and social movements have contributed to increased representation of African Americans in education, politics, business, and the professions.

The percentage of African Americans aged 25 and older who held a bachelor's degree or higher increased from 11.3% in 1990 to approximately 29% in 2019 (U.S. Census Bureau, 2020). This rise reflects the impact of policies aimed at expanding access to higher education and reducing educational disparities.

African Americans have made strides in entering high-status professions. They serve as neurosurgeons, lawyers, corporate executives, and hold significant political offices, including the presidency. The visibility of African Americans in leadership roles contributes to changing societal perceptions and provides role models for younger generations.

Greater inclusion in the workforce has boosted economic productivity and innovation. Diverse teams have been shown to outperform homogeneous ones due to a wider range of perspectives and problem-solving approaches (Hunt et al., 2015).

While challenges and disparities obviously persist, the United States' experience illustrates how targeted efforts to address racial inequalities can lead to increased social and economic inclusion of marginalized populations. These efforts have involved not only legal reforms but also initiatives in education, employment, and cultural representation.

Section 2.8 The Intersection of Race, Class, and Social Mobility

In Brazil, the intersectionality of race and class creates compounded barriers to social mobility for Afro-Brazilians. Economic policies aimed at reducing poverty and inequality are insufficient if they do not simultaneously address the underlying racial discrimination that limits opportunities for a significant portion of the population. There were significant improvements like the criminalization of racism (something uncommon around the world), quotas for public university positions and *Estatuto da Igualdade Racial*, and we are starting to see its results. Access to quality education is critical for breaking the cycle of poverty and marginalization. The *Lei de Cotas* (Law of Quotas) of 2012 mandates that federal universities reserve a percentage of admissions for students from public schools, low-income backgrounds, and racial minorities (Brasil, 2012).

Studies have shown that these policies have improved educational outcomes for Afro-Brazilian students. For example, Francis and Tannuri-Pianto (2012) found that racial quotas at the University of Brasília led to increased enrollment and academic performance among Afro-Brazilian students.

Strengthening and enforcing laws against racial discrimination in employment, housing, and public services is essential. The adoption of the *Estatuto da Igualdade Racial* (Statute of Racial Equality) in 2010 represents a legal framework for promoting racial equality (Brasil, 2010).

Nevertheless, Afro-Brazilians often face a double burden of racial prejudice and economic disadvantage. The historical legacy of slavery and exclusion has resulted in generational poverty, with limited access to resources that facilitate upward mobility. This includes quality education, professional networks, and capital for entrepreneurship.

Section 2.9 Education as a Catalyst for Inclusion

Education policies must be accompanied by broader social reforms to address systemic inequalities. Promoting entrepreneurship and access to capital for Afro-Brazilian businesses can foster economic empowerment. Microcredit programs, business incubators, and mentorship initiatives can support the development of Afro-Brazilian enterprises. Increasing the inclusion of Afro-Brazilians in media, politics, and leadership roles challenges stereotypes and influences policy. Representation can shift societal attitudes and provide role models for marginalized communities.

Section 2.10 Cultural Recognition and Valuation

Valuing Afro-Brazilian culture and contributions is essential for combating racism. Celebrating African heritage through education, media, and public discourse can shift societal attitudes and reduce prejudice. Initiatives such as Black Awareness Day (Dia da Consciência Negra) promote recognition of Afro-Brazilian history and culture.

Section 3. Conclusion

The integration of Afro-Brazilians, who constitute over half of Brazil's population, is not only a matter of social justice but also a strategic imperative for the nation's development. Systemic racism perpetuates inequalities that hinder economic growth, weaken social cohesion, and diminish human development outcomes. The exclusion of Afro-Brazilians from full participation in society results in the underutilization of talents and resources that are essential for Brazil to realize its full potential.

Addressing racism requires comprehensive policies that tackle discrimination at structural and institutional levels. This includes enforcing anti-discrimination laws, promoting equitable access to education and economic opportunities, and fostering cultural recognition of Afro-Brazilian contributions. Efforts to increase representation in leadership positions and challenge societal stereotypes are critical for shifting attitudes and driving change.

The experiences of the United States demonstrate that deliberate and sustained efforts to address racial inequalities can lead to significant progress. While Brazil's context is unique, the fundamental principle remains: *inclusivity enhances national development*.

Racism may indeed pose a more significant barrier to Brazil's progress than corruption and economic inequality alone. The interconnectedness of these issues necessitates a multifaceted approach that prioritizes racial equality as a cornerstone of development strategies. By embracing diversity and fostering an inclusive society, Brazil can harness the full potential of its citizens, strengthen its economy, and enhance its standing in the global community.

In conclusion, the legacy of Portuguese miscegenation has created a complex social fabric in Brazil, but it is the responsibility of contemporary society to address the inequalities that persist. Integrating Afro-Brazilians into all facets of national life is essential for achieving sustainable development, social justice, and prosperity.

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