

Article

Basic Human Values in Portugal: Exploring the Years 2002 to 2020

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Abstract: Understanding the evolution of societal values is crucial amidst globalization and migration. This study aimed to (1) map Portugal's basic human values (BHV) profile in 2020 through comparison with six European countries (Bulgaria, France, United Kingdom, Hungary, Italy, and Norway) and (2) analyze Portugal's BHVs trajectory from 2002 to 2020. Drawing on Schwartz's theory and European Social Survey (ESS) data, we applied descriptive statistics, similarity indices, post-stratification weighting, and trend analysis after extensive data cleaning. Results indicate that in 2020, Portugal displayed high self-transcendence and relatively high openness to change, aligning most closely with the United Kingdom and Hungary. Longitudinal analysis revealed a shift after 2012, marked by rising hedonism, stimulation, and self-direction, and declining conformity. These value dynamics offer insights into future societal demands and potential tensions. Moreover, Portugal's emerging value configuration—balancing self-transcendence with growing openness—may foster economic opportunities by enhancing attractiveness for innovation ecosystems (linked to self-direction and stimulation), experience-driven tourism (hedonism), and investments aligned with sustainable and social goals (universalism and benevolence). Monitoring value changes remains essential to anticipate societal transformations and inform policy design.

Keywords: human values; Portugal; Schwartz; European countries; ESS



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1. Introduction

Comprehending the economic, social, and cultural processes of each era is essential for a nation's effective governance. Anticipating opportunities and addressing internal and external conflicts contribute to fostering national stability and the welfare of the populace. Achieving such goals does not seem feasible without the active involvement of the resident population in this process, which emphasizes the vital importance of comprehending their underlying values. A nation's values drive it towards consuming specific products, aligning with particular agendas, advocating for changes (such as mitigating climate change), or culturally resisting external influences.

In the first two decades of the 21st century, Portugal stood as an example of the transformations occurring in the West, which substantially impacted its society. The country significantly expanded its integration with the European Union due to the adoption of the euro in 1999 and access to European funds [1], which facilitated the execution of major road, rail, and logistics infrastructure projects [2] (such as those carried out on the A11 highway). Tourism solidified its position as a significant source of revenue for the nation [3,4], registering a 43% increase in the number of tourists between 2000 and 2019.

The population aged during this period [5], shifting its concentration from the 20-to-39 age group to the 40-to-59 age group, which presents challenges for the social security system and the labor market. Concurrently, the influx of immigrants increased threefold between 2008 and 2019 [6], contributing to cultural diversification and sometimes generating conflicts and public dissatisfaction. In parallel, Portugal embraced environmental causes, investing significantly in renewable energies, primarily wind and solar power [7], which expanded fourteenfold between 2000 and 2020, while coal consumption decreased sevenfold, and the consumption of petroleum derivatives decreased twofold. These transformations have exposed Portuguese society to various changes, positioning it as a fruitful stage for Western and European society analysis.

Such a comprehension of underlying values is demonstrably evident in how Portugal has aligned its national policies with the needs and aspirations of its citizens [8–10]. Examples of alignment include the following:

- **Policies of social and economic inclusion:** Portugal has implemented policies to reduce social and economic disparities. Programs such as the Social Integration Income (RSI) exemplify how the government seeks to support the most vulnerable. There is also a strong investment in education and vocational training to increase employability and promote equal opportunities [11,12].
- **Health and well-being:** The Portuguese healthcare system, based on the National Health Service (SNS), reflects the value of universal and equal access to healthcare. Recent reforms aim to enhance the efficiency and quality of healthcare services while ensuring accessibility for the entire population [13–15].
- **Sustainability and environment:** Portugal demonstrates its commitment to sustainability and environmental protection through policies focused on renewable energy, carbon emission reduction, and biodiversity conservation [16,17].
- **Culture and identity:** Investments in policies that promote the arts, the language, and the cultural heritage demonstrate the Portuguese government's appreciation for national culture and identity [18,19].
- **Democracy and civic participation:** Portugal fosters civic participation and active democracy with initiatives such as participatory budgets, emphasizing the importance of democratic participation and governmental transparency [20–22].

These policies exemplify Portugal's endeavor to align governmental strategies with the values and expectations of the population, striving to foster a more just, sustainable, and inclusive society.

Whilst subject to influences such as age [23,24], social class, and the agency of diverse social actors [25], this article does not delve into an analysis of these differences. Instead, it focuses on a broader discussion, encompassing only the nations selected for the 2020 data and, more specifically, conducting a biennial analysis of Portugal between 2002 and 2020.

This article aims to contribute to the understanding of Portuguese societal values in 2020, assessing their development over 18 years and seeking to capture the trends that will most affect the Portuguese way of life. The authors chose this period because the data for all survey rounds were available when they accessed the European Social Survey website [26].

A comparison was made with six other nations—Bulgaria, France, the UK, Hungary, Italy, and Norway—focusing specifically on 2020 to gain a broader understanding of Portugal's context. These countries were selected based on two key criteria: their consistent participation in every round of the European Social Survey since its inception in 2002 and their representation of diverse European geographical regions. This deliberate selection aimed to facilitate an analysis of how deeply the system of basic human values is intertwined with a country's historical trajectory and geographical setting.

The theoretical framework employed is Shalom Schwartz's Basic Human Values theory (2012), and the data used are from the European Social Survey [26]. According to Schwartz [27] (pp. 3–4), basic human values exhibit six characteristics: “values are beliefs linked inextricably to affect”; “values refer to desirable goals that motivate action”; “values transcend specific actions and situations”; “values serve as standards or criteria”; “values are ordered by importance relative to one another”; and “the relative importance of multiple values guides action”.

A survey for measuring human values was developed within the European Social Survey [28]. The Portrait Values Questionnaire (PVQ) comprises 21 items structured to capture the 10 Basic Human Values proposed by Schwartz [27,29]. Using a 6-point Likert scale, respondents are presented with profiles of people and asked to indicate the extent to which they identify with each one. The profiles presented vary according to the respondent's gender.

Using Schwartz's theory [29] provides a robust conceptual foundation for our investigation. Validated across various countries, it asserts that Basic Human Values remain constant over time and place. Despite variations in emphasis and significance within each society and period, the core set of 10 values remains constant. By coupling this characteristic with systematic biennial data collection across European nation-states since 2002, employing consistent Likert scales and inquiries of the ESS, we rely on a dependable and stable database for the ensuing analysis in this article.

Three chapters organize this work: the first presents Schwartz's theory of basic values [27], the second describes the data preparation methodology, and the third chapter reports the results. Three sections divide the last chapter: (1) comparing Portugal with selected countries in 2020 regarding higher-order human values; (2) assessing the evolution of basic human values in Portugal over nine rounds of data collection; and (3) analyzing perspectives on future changes in the profile of Portuguese values.

2. Schwartz's Theory of Basic Human Values

Schwartz's theory of Basic Human Values [27,29] defines Basic Human Values (BHV) as universal principles derived from fundamental human needs. According to Schwartz, these values arise from three primary necessities: (1) biological survival, (2) coordination of social interactions, and (3) collective survival and well-being. These needs are universal across societies, making the resulting values globally relevant and applicable.

Schwartz's theory is structured around ten interrelated fundamental values:

1. **Self-direction**—independent thought and action; autonomy in decision-making and creativity;
2. **Stimulation**—pursuit of excitement, novelty, and challenges;
3. **Hedonism**—pursuit of pleasure and sensory gratification;
4. **Achievement**—emphasis on personal success through demonstrating competence according to social standards;
5. **Power**—desire for social status, prestige, and dominance over people and resources;
6. **Security**—valuing security, harmony, and social and personal stability;
7. **Conformity**—restraining actions that disrupt social harmony or violate established norms;
8. **Tradition**—respect for and commitment to traditional customs and beliefs;
9. **Benevolence**—concern for the welfare of people close to oneself;
10. **Universalism**—understanding, tolerance, and protection for the welfare of all people and nature.

These values are arranged in a circular structure (Figure 1), highlighting their compatibilities and conflicts. For example, Universalism opposes Power, suggesting that

individuals prioritizing global well-being tend to emphasize personal dominance and material wealth less.

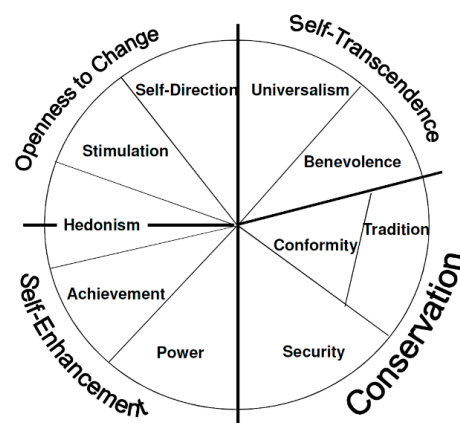


Figure 1. Theoretical model of relations among ten motivational types of values [27] (p. 9).

Additionally, these values are grouped into four higher-order dimensions:

- **Openness to Change:** Self-Direction and Stimulation;
- **Conservation:** Security, Conformity, and Tradition;
- **Self-Enhancement:** Achievement and Power;
- **Self-Transcendence:** Benevolence and Universalism.

Several other relevant models address human values, notably those of Maslow [30], Rokeach [31], and Inglehart [32–34]. Maslow’s theory organizes human needs into a sequential hierarchy; Rokeach distinguishes between terminal and instrumental values; and Inglehart categorizes values into Materialistic and Post-Materialistic types. Schwartz’s theory was selected for its consistent empirical validation, comprehensive structure, and a unique capability to map conflicts and compatibilities among values.

Numerous empirical studies demonstrate the interdisciplinary applicability of Schwartz’s theory, covering contexts such as work and organizations (Yankelovich et al. [35]; Giorgi and Marsh [36]; Rodrigues [37]; Vala [38]; Jesuino [39]; Ramos [40]), citizenship and politics (Verba and Orren [41]; Halman [42]; Almeida [43]; Freire [44]), religion (Halman and Moor [45]; Halman and Draulans [46]), prejudice and discrimination (Katz and Hass [47]; Vala et al. [48]), as well as generational and gender studies (Menezes and Campos [49]; Inglehart et al. [50]).

Results from the European Social Survey (ESS) reinforce the intercultural validity of Schwartz’s theory, utilizing a robust and empirically validated method (Portrait Values Questionnaire—PVQ). These studies indicate that Schwartz’s proposed values have broad applicability and explanatory power across diverse socioeconomic contexts (Schwartz and Sagie [51]).

The Table 1 summarizes the findings of this manuscript compared to relevant empirical studies:

Table 1. A comparison of relevant empirical studies and findings presented in this manuscript.

Study	Context	Dominant Values Identified	Similarities and Differences with the Current Study
Sagiv and Schwartz [52]	Europe	Universalism, Benevolence	Agreement on the importance of Benevolence.
Vecchione et al. [53]	Italy	Conservation, Security	Similarities in Conservation values; differences in Openness to Change.
Fischer and Schwartz [54]	International	Universalism, Security, Achievement	Divergences in economic emphasis.
Schwartz and Sagie [51]	Europe	Self-Transcendence, Openness to Change, Conservation	Confirms the relationship between economic development and values salience.

In summary, Schwartz's theory provides a widely validated framework that facilitates detailed analysis of values, cultural identities, and generational changes. These aspects make it particularly relevant for understanding value dynamics in Portugal, which is the focus of this study.

3. Materials and Methods

We obtained data focusing on variables from the "human values scale" theme from the ESS data portal [26]. For Portugal, we collected data across all nine rounds between 2002 and 2020. For Bulgaria, France, the United Kingdom, Hungary, Italy, and Norway, data were collected only for the 2020 round. These countries were selected based on data availability during our search and for representing diverse European regions, each with a distinct political and religious history. Data pre-processing followed the procedures established by Schwartz [55], incorporating an additional step to convert the final scores into percentages, according to Silva [25].

Firstly, cleaning the ESS data involved deleting questionnaires with more than five codes of "refusal" (7), "don't know" (8), or "no response" (9). Questionnaires with over 16 identical responses on the 1–6 Likert scale were also removed, suggesting that respondents invalidated the questionnaire. We implemented these exclusions to align with the methodology of the European Social Survey, our data source. This data cleaning ensures that the resulting set of valid questionnaires accurately reflects the characteristics of the population we are studying. While evaluating the questionnaire's administration would require using all responses, we aimed to investigate substantive issues, such as the relationships between values or how they relate to behaviors. Therefore, this cleaning step is necessary. For the questionnaires utilized in this study, we treated scores of "refusal" (7), "don't know" (8), or "no response" (9) as null values.

The second stage involved reversing the Likert scale codes, whereby a score of 6 came to represent "very much like me" (indicating the strongest agreement), and a score of 1 came to represent "not at all like me". Thus, scores with code 1 were changed to 6, those with code 2 were converted to 5, and so on.

In the third stage, we calculated each respondent's average score across the 21 basic human values (BHV) questionnaire items. Subsequently, Cronbach's alpha was computed for each BHV to assess data reliability.

In the fourth stage, we performed a centralization step that subtracted each respondent's mean score from their ratings for the 21 questionnaire items. This adjustment is necessary to facilitate comparisons between respondents, as individual response styles can introduce bias towards the extremes of the Likert scale.

In the following stage, we calibrated the data using post-stratification weights (including the design weight) provided by the ESS to address sampling errors. These weights account for imbalances in the sample distribution of age, gender, years of education, and region [56].

Later, national averages were computed for each of the 10 BHVs based on all responses aggregated by country for 2020. For Portugal specifically, we also calculated averages for previous even years up to 2002. To ease interpretation, we converted these averages into percentages using the methodology described by Silva [25] (p. 329).

In the final stage, the BHVs percentages (by country and year) were aggregated to reflect the "Higher Order Values" (HOVs) presented in Figure 1. As Hedonism contributes to two HOVs, its percentage was divided, with 0.75 attributed to Openness to Change and 0.25 to Self-Enhancement, as described by Schwartz [57].

A similarity index, based on Silva's [25], was adopted to compare Portugal with the six selected countries. Two stages were necessary to calculate the index. Initially, the scores for

each of Portugal's Basic Human Values were subtracted from the equivalent scores of the other countries, producing a difference score between Portugal and the selected countries for each Basic Human Value according to the subsequent formula:

$$d_{ij} = V_{p_j} - V_{o_{ij}}$$

where

d_{ij} constitutes the Difference score between Portugal and the selected countries for each basic human value;

V_{p_j} is the score of the j -th value in the Portuguese BHVs system;

$V_{o_{ij}}$ is the score of the j -th value in the BHV system of country i .d.

In the second stage, the similarity index is calculated by subtracting the smallest value of the differences found from the largest value of the differences found in the country's BHVs concerning Portugal. The formula for generating the index is as follows:

$$S_i = \max(d_{ij_1} + d_{ij_2} + d_{ij_{\dots}} + d_{ij_{10}}) - \min(d_{ij_1} + d_{ij_2} + d_{ij_{\dots}} + d_{ij_{10}})$$

where S_i is the similarity index identifying countries most similar to Portugal. According to this index, a lower value indicates a higher degree of similarity between a country's BHVs system and that of Portugal.

Microsoft® Excel® to Microsoft 365 MSO (Version 2504 Build 16.0.18730.20122) 64 bits software was employed for all previously mentioned processes.

4. Results

4.1. Variation in Higher-Order Values (HOVs) Subsection

When examining Higher-Order Values (HOVs) in Portugal between 2002 and 2020, Figure 2 reveals two distinct phases in Portuguese society. The first decade of research demonstrates a more conservative nation, culminating in 2008, when the global economic crisis severely impacted numerous countries, including Portugal [58]. In that year, the percentage of Conservation exceeded that of Openness to Change by 2.1 times, marking the highest percentage in the series until 2020.

The second period began in 2014, the year the European economic bailout program for Portugal ended, which imposed strict measures to control public spending [59]. This period marked a notable shift towards emphasizing Openness to Change compared to the preceding years. In 2016, the difference between Conservation and Openness to Change reached its minimum in the series (only 1.1 times), as depicted in Figure 2. It is worth noting that 2016 coincided with Portugal's victory in the UEFA European Football Championship and the appointment of António Guterres as the Secretary-General of the UN [60]. In 2020, the year of the COVID-19 pandemic, we observe a return towards Conservation values, although these remain below the levels observed in 2014.

The analysis of the Openness to Change–Conservation axis, considering historical events, aligns with findings from other studies [23], showing that in times of socioeconomic hardship, conservative values gain more acceptance due to a societal pursuit of Security and Tradition. Conversely, during prosperous periods and high national self-esteem, Openness to Change values becomes prominent as society faces fewer risks and is more open to experimenting with novelties.

Upon analysis of the Self-Enhancement–Self-Transcendence axis, we observe that, in general, Portuguese society prioritizes values such as the well-being of family and friends, society as a whole, and nature, 2.4 times more than those related to power and self-interests. The years 2006 and 2020 were atypical, with this difference reaching 3.4 and 3.0 times higher, respectively. This advantage of Self-Transcendence is commonly observed in Western or

highly developed countries, which is likely associated with social and economic stability that allows individuals to focus more on the well-being of others than themselves [23,24].

France strongly emphasized Self-Transcendence among the compared countries in 2020, with scores more than 4.5 times higher than Self-Enhancement. Bulgaria presented a contrasting case, with a ratio of only 1.9 times. Interestingly, Portugal's value distribution in 2020 diverged from Italy's, a country with similar Catholic-Mediterranean roots. Italian society appeared more conservative and focused on Self-Enhancement compared to Portugal.

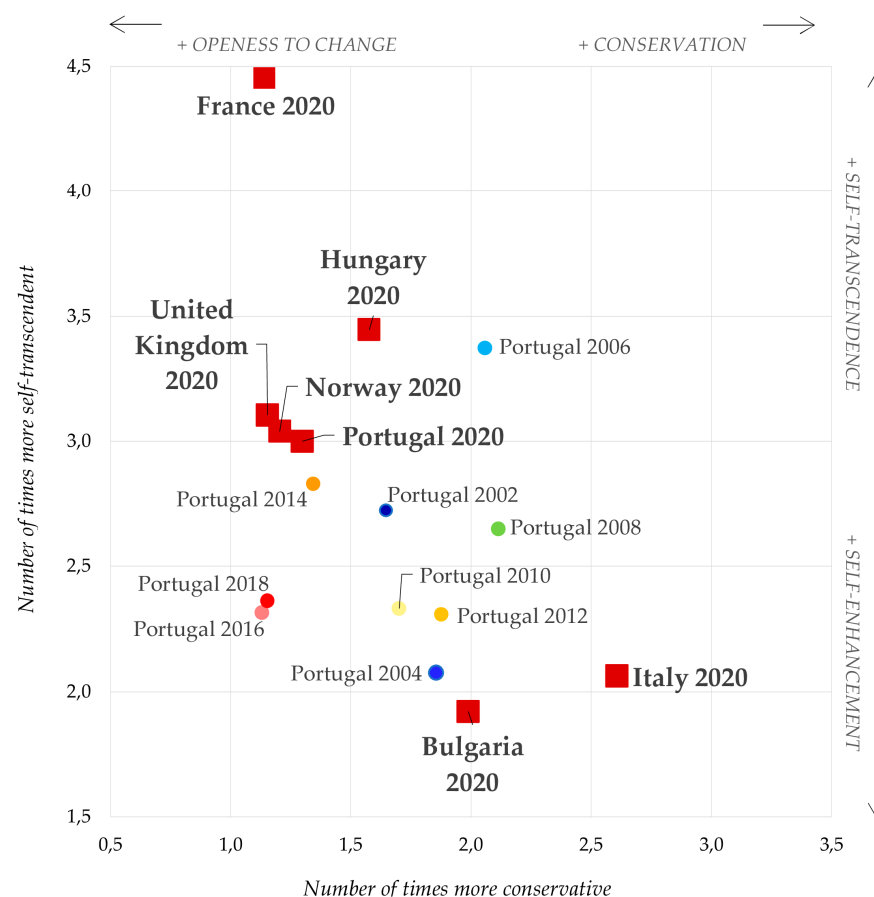


Figure 2. Dynamics of HigherOrder Values in Portugal from 2002 to 2020 and cross-national comparison in 2020.

4.2. Comparison of Basic Human Values Among Countries

To evaluate the resemblance of Basic Human Values (BHV) systems, we utilized a similarity index (Table 2) based on Silva's [25] proposal. Two measures are extracted: (1) the amplitude of the differences between each Portuguese BHV score and those of other countries and (2) the closest country to Portugal considering BHVs.

Before cross-national comparisons, it is important to highlight common characteristics in the value systems of European countries, such as high scores for Benevolence and Universalism (Table 2) and low interest in issues related to Power. The percentage discrepancies between Portugal's scores and those of other countries are generally modest. Therefore, we should focus on variations greater than 2.5%, as they can reveal distinct social profiles that significantly shape the future trajectory of each nation.

The analysis of HigherOrder Values (Figure 2) suggests a greater similarity between Portugal, the United Kingdom, and Norway. However, a closer examination of all ten Basic Human Values reveals a different pattern, with Portugal's value system aligning more closely with those of the United Kingdom and Hungary. Looking at Table 2, we notice that Norway is further away from Portugal than Hungary in terms of Power and

Achievement values. Furthermore, there is a significant difference between Portugal and Norway regarding the acceptance of laws and social norms, with Portuguese society valuing Conformity 6.2% less.

Table 2. Similarities between the value system of Portugal and selected countries—2020.

Human Basic Values	Difference Score Between Portugal and the Selected Countries							Similarity Index by BHV
	Portugal	Bulgaria	France	UK	Hungary	Italy	Norway	
Universalism	15.7%	2.1%	−0.4%	−0.3%	−0.5%	0.3%	1.0%	2.6%
Benevolence	17.8%	1.0%	0.7%	0.9%	0.4%	1.6%	0.2%	1.4%
Conformity	5.3%	−4.9%	−2.2%	−2.3%	−2.3%	−4.5%	−6.2%	4.0%
Tradition	11.2%	2.4%	−0.2%	1.4%	2.8%	−1.3%	2.5%	4.1%
Security	14.7%	−2.1%	2.1%	1.9%	−4.0%	−1.4%	3.8%	7.8%
Power	0.5%	−1.7%	−0.5%	−1.4%	0.5%	−3.2%	−2.3%	3.7%
Achievement	8.3%	−4.0%	4.9%	1.6%	1.3%	−2.7%	2.8%	8.9%
Hedonism	9.4%	4.0%	−2.7%	1.4%	−1.1%	7.3%	0.3%	10.0%
Stimulation	1.8%	−1.5%	−4.0%	−4.7%	1.2%	0.8%	−4.4%	5.8%
Self-Direction	15.3%	4.7%	2.6%	1.6%	1.8%	3.2%	2.4%	3.1%
Similarity Index by Country		9.6%	9.0%	6.6%	6.8%	11.7%	10.0%	-
Sum of the Absolute Differences		28.2%	20.3%	17.3%	15.7%	26.2%	25.8%	-

Analysis of the similarity index by country reveals that the United Kingdom exhibits the smallest percentage (6.6%) compared to Portugal, suggesting a high degree of similarity in Basic Human Values between the two countries. Hungary follows closely with a slightly larger percentage (6.8%). However, upon examining the sum of the absolute differences, Hungary emerges as the nation most similar to Portugal, with 15.7%, followed by the UK (17.3%).

This study considered the similarity index by country as the main source of similarity between Portugal and the selected countries. This index shows how the differences are closest to Portugal's scores since the maximum and minimum values are closest. So, there is no risk of large differences being masked when calculating averages or sums.

In the United Kingdom, Benevolence and Universalism emerge as the Basic Human Values (BHVs) most similar to those in Portugal, with score discrepancies of only 0.3% and 0.9%, respectively (Table 2). Conversely, Portugal exhibits a 4.7% lower value for Stimulation (pursuit of novelty and challenges) than the UK. Conformity also shows a significant difference, with Portuguese society demonstrating a 2.3% weaker endorsement of laws and social norms in 2020. Notably, Portugal recorded the lowest score for Conformity among the analyzed countries, potentially indicating dissatisfaction with current norms and suggesting that changes will likely occur in the coming years. Consequently, Portugal also exhibits the highest score for Self-Direction.

Hungary exhibits a value system closely resembling Portugal's, particularly Benevolence (caring for and showing kindness to those close to you), with a difference of only 0.4% favoring Portugal. A similar emphasis is observed between the two nations in Universalism (−0.5%) and Power (0.5%). Security emerges as the most divergent value, with Hungarians scoring 4.0% higher. Additionally, Portugal demonstrates a stronger orientation towards traditions (2.8% higher) and a weaker emphasis on Conformity (−2.8%) than Hungary.

When comparing Portugal with other countries, we observe some significant differences in societies' Basic Human Values (BHV) systems. For instance, the emphasis on issues related to Hedonism (pursuit of pleasure and personal gratification) is 7.3% lower in Italy. In contrast, Achievement (the need for social recognition of personal success achieved) is

4.9% less valued in France, while Self-Direction (independence of thought and action) is 4.7% less valued in Bulgaria.

Analysis of individual BHVs and their variations across the selected countries reveals the highest magnitude of differences (10%) for Hedonism, followed by Security (7.8%). Such evidence suggests a significant influence of socio-political economic contexts on value systems, potentially reflecting European countries' diverse historical and cultural backgrounds.

4.3. Changes in the Portuguese Basic Human Values System

Understanding Portuguese society's Basic Human Values (BHVs) in 2020 and comparing them with those of other countries offers valuable information for planning Portugal's future. However, a complementary analysis of the evolution of the importance of each BHV in Portugal between 2002 and 2020 is also crucial to better understand the Portuguese internal context.

Examining Figure 3 reveals three groups of BHVs to which the Portuguese attributed varying levels of importance over the years. The first group comprises Benevolence, Universalism, Security, Tradition, and Self-Direction. The second group includes Achievement, Hedonism, and Conformity. Lastly, the third group consists of the least valued BHVs by the Portuguese: Power and Stimulation.

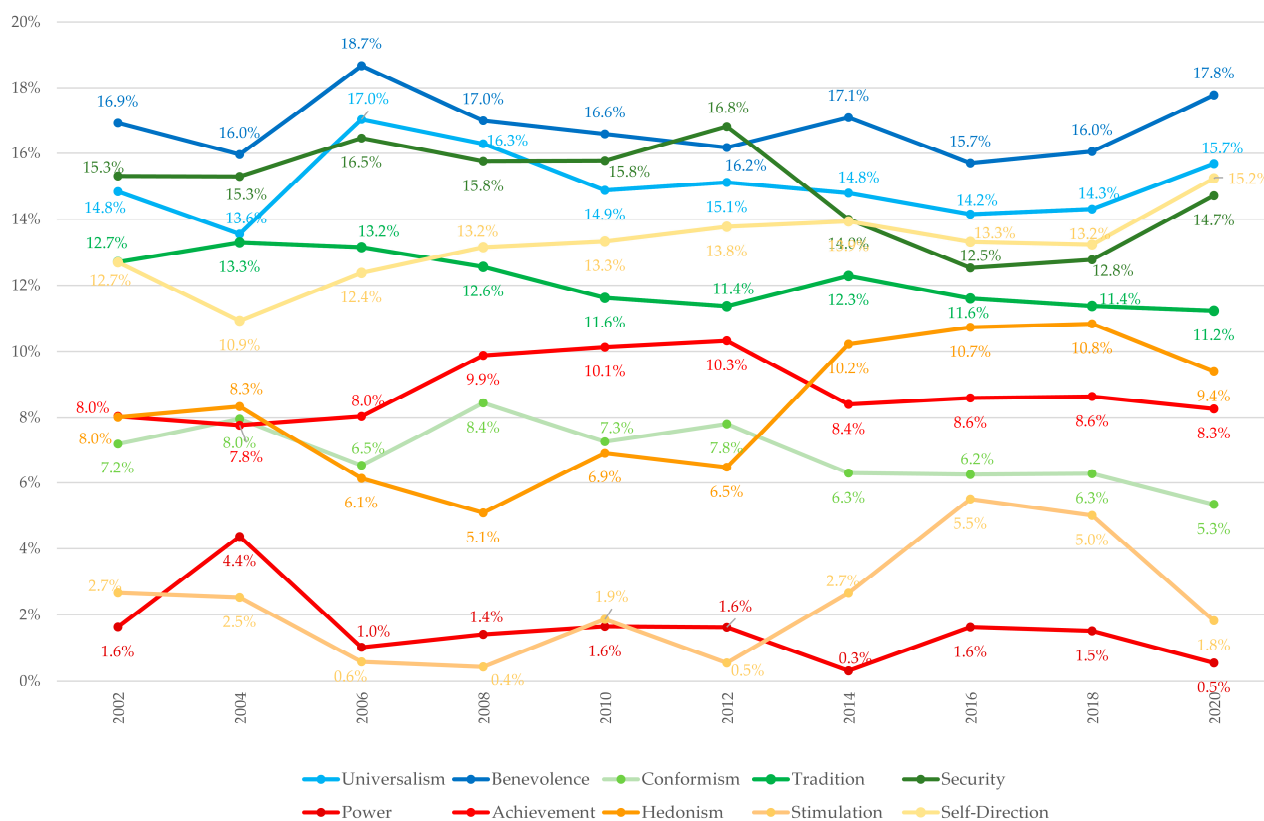


Figure 3. Evolution of the 10 Basic Human Values (BHVs) in Portugal between 2002 and 2020.

Historically, Benevolence has been the most valued BHV in Portugal, holding its position except for 2012, when Security surpassed it. With approval ratings consistently high, ranging between 16 and 19%, Benevolence (care for family and close ones) showed minimal variation (3%) over the 2002–2020 period, indicating its solid presence in Portuguese society, with an average of 16.8%.

Universalism has been the second most significant BHV for the Portuguese since 2014, although its peak occurred in 2006, reaching 17%. Interestingly, its lowest acceptance was in 2004, at 13.6%, marking the largest variation within a two-year period (between 2004

and 2006). In 2020, Universalism (tolerance and concern for the welfare of all and nature) recorded 16% importance for the Portuguese, with its historical average being 15.1%.

Self-Direction ranks as the third most valued Basic Human Value (BHV) in Portuguese society (2020), constituting 15% of the societal value system. However, its importance has fluctuated, ranking fifth in 2004 and 2006, fourth in 2008, and achieving its current position in 2016. The historical average for Self-Direction is 13.2%, with a variation of 4.3% across the analyzed period.

The third position of Self-Direction in 2020 is also related to the significant decrease in Portuguese interest in security-related issues. Security was once the second most important BHV, peaking at the top spot in 2012 with a 17% share. However, it dropped by four percentage points by 2016, now ranking fourth in 2020 at 14.7%. Despite a historically high average score of 14.9%, Security no longer exhibits the same level of importance within Portuguese society.

Occupying an intermediate position within the Portuguese value system, Tradition exhibits a remarkable degree of stability over the 18-year study period, demonstrating the smallest variation (2.1%) among the ten BHVs. This stability has been particularly pronounced in the last twelve years, with variations not exceeding 1.4%. Respect for and commitment to maintaining customs and traditions have remained around 12% interest. However, the most recent measurement in 2020 reveals the lowest score in the series (11.2%), suggesting the need for continued monitoring in future surveys to understand this decline.

Hedonism also holds an intermediate position on the Basic Human Values (BHVs) scale in Portugal, mainly influenced by the past 8 years when the population's interest in pleasure and personal gratification increased. It is noteworthy that the two periods of decline "coincided" with the years 2008 (the global financial crisis) and 2020 (the COVID-19 pandemic). In the historical series, Hedonism showed the highest variation (5.7%) among all 10 BHVs, with the lowest recorded in 2008 (5.1%) and the highest in 2018 (10.8%). In the latest measurement, it reached 9.4%.

The sixth most valued Basic Human Value in Portuguese society is Achievement, where individuals seek social recognition for their personal accomplishments. From 2002 to 2020, it experienced minimal fluctuations in percentages, only 2.6%, with recent measurements showing a mere 0.3% variation. Its average over the entire data period was 8.8%, with a performance of 8.3% in 2020.

The Basic Human Value (BHV) of Conformity declined in Portugal, especially over the last four years, reaching its lowest level (5.3%) in 2020. This suggests growing discomfort within Portuguese society regarding adherence to societal laws and norms. This trend aligns with the rise in Hedonism, indicating a shift towards prioritizing personal achievements over societal expectations.

Stimulation (desire for novelty, challenges) ranked second to last in Portugal's value system in 2020, with an interest level of 1.8%. It consistently held the last position between 2002 and 2012, reaching its lowest score in 2008 at 0.4%. However, interest increased from 2014, peaking at 5.5% in 2016. Among the 10 Basic Human Values, this was the second with the highest variation over the 18 years of data tracking, second only to Hedonism.

The BHV of Power has consistently shown little prestige and interest in Portuguese society. Variations have been minimal from 2002 to 2020, with only one peak recorded in 2004 (4.4%). Excluding this score, the average interest in Power remained at 1.3%, reaching its lowest point in 2014 (0.3%). In 2020, interest remained very low, at only 0.5%. This BHV suggests a lack of interest among Portuguese individuals in accumulating wealth or exerting control over others.

4.4. Trends in the Basic Human Values System in Portugal

After examining the linear trends in basic human values (BHVs) over the past three series years (2016, 2018, and 2020), three distinct patterns emerge. In the first set, those declining in value, Stimulation, Hedonism, Power, and Conformity, stand out. In the second group, which remains stable, we find Tradition and Achievement. In the third group, the BHVs gaining more influence are Universalism, Self-Determination, Benevolence, and Security. Figure 4 shows the behavior of each BHV in the period.

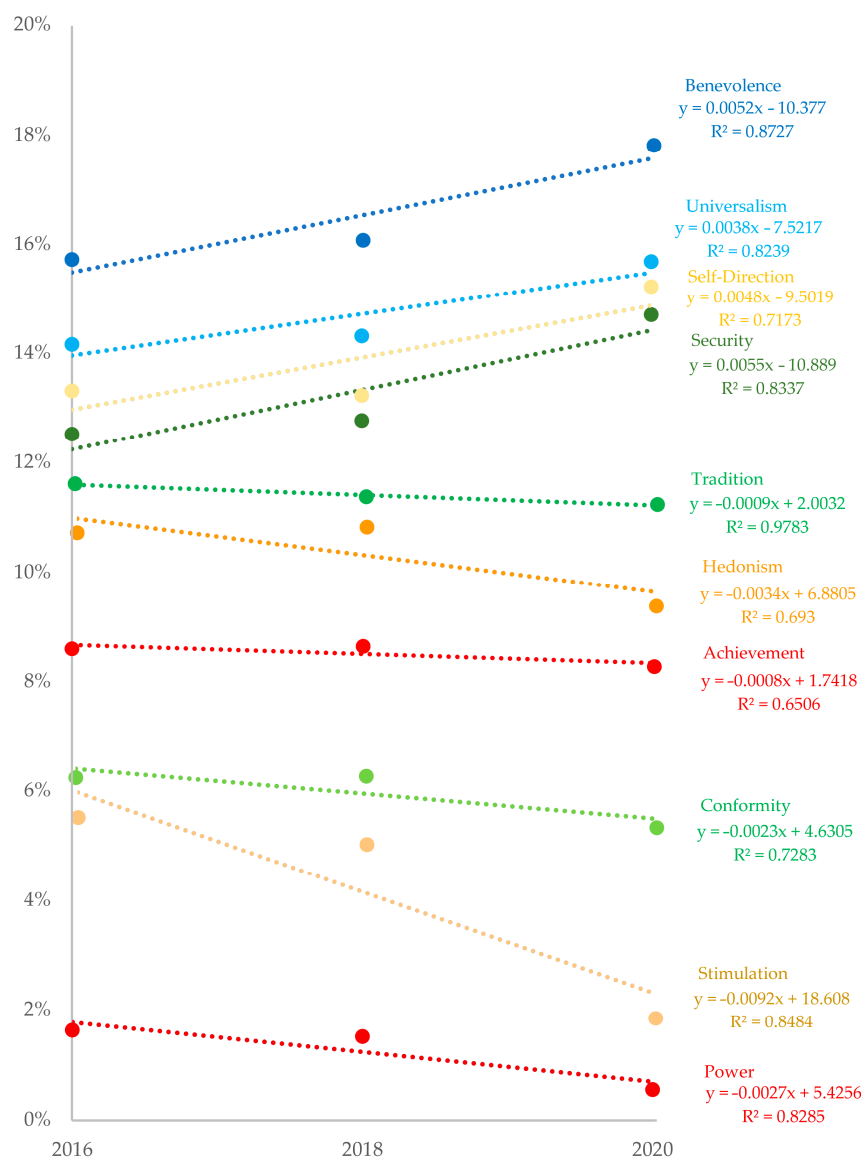


Figure 4. Linear trends for BHVs in Portugal.

Among all BHVs, Achievement exhibits the greatest stability, and there is no expectation that it will undergo significant changes in its behavior, like Tradition. Interestingly, Portugal demonstrates a rising value placed on Self-Determination (freedom of thought and action). However, this impact is not evident in Tradition but rather in Conformity (adherence to social norms), which shows a decrease in value and appears to be undergoing a continuing decline.

The most significant changes in the Portuguese value system are observed on the Stimulation—Security axis. While Stimulation (trying new things in life) was sharply declining, Security showed a strong increase in interest. The COVID-19 pandemic, which has profoundly shaken people worldwide, may be related to this. As Security involves

valuing social stability and considering that the State should protect citizens, the pandemic has confronted us with personal powerlessness. Additionally, it is worth examining how the intense immigration flows into Portugal influence these value system changes.

Assuming the COVID-19 pandemic is the primary driver, security scores will decrease in the 2022 survey. Conversely, if immigration is the dominant factor, security scores will likely remain elevated. Notably, Portugal introduced Law No. 18/2022 [61], which streamlines entry procedures for digital nomad workers and grants visas for job seekers from the CPLP (Community of Portuguese Language Countries).

Universalism and Benevolence continue to increase; however, they are likely nearing the upper plausible limit, as they are already among the highest in Europe. On the other hand, Power seems to be reaching stability or a turning point for the same reason. Lastly, despite a decline, Hedonism may undergo a turning point and see increased interest in the coming years because before the pandemic this BHV was experiencing a rise in value.

5. Discussion

An analysis of the Portuguese value system in 2020, based on the European Social Survey data, reveals a distinctive profile characterized by elevated levels of Self-Transcendence (Benevolence, Universalism) and a comparatively lower emphasis on Conservation (Tradition, Conformity, Security), relative to the patterns observed in the preceding decade (Figures 2 and 3). Despite cultural proximities rooted in a shared Mediterranean and religious heritage, Portugal's value configuration demonstrates greater affinities with the United Kingdom and Hungary than with Italy, underscoring national specificities within the universal structure proposed by Schwartz [27,29]. The prominence of Self-Transcendence values, particularly Benevolence and Universalism, aligns with broader European trends, where these values consistently occupy top positions in the societal hierarchy [51,52].

Between 2012 and 2018, coinciding with the country's recovery following the European debt crisis and the conclusion of the bailout program [59], Portuguese society exhibited a notable rise in the appreciation of Hedonism and Stimulation (Figure 3). This tendency corroborates theoretical perspectives suggesting that greater societal well-being fosters openness to experiences and self-gratification [23,24]. However, the emergence of the COVID-19 pandemic marked a substantial reversal: Benevolence, Universalism, and especially Security values intensified, while Power and Stimulation declined (Figure 4). This reorientation reflects theoretical expectations that external threats heighten societal demands for safety and solidarity [23,24]. Simultaneously, the continued devaluation of Power aligns with broader patterns across Western Europe, where dominance and status seeking are generally less prioritized [51,52].

The observed dynamics suggest that cultural evolution in Portugal cannot be fully explained by traditional alignments based on religious or geographical proximity. Rather, factors such as European integration [1], intensified migratory movements (notably the threefold increase in immigration between 2008 and 2019 [6]), and the dissemination of globalized sociopolitical ideals appear to have significantly shaped the Portuguese value landscape. These trends highlight the non-deterministic character of cultural transformation, indicating that shared historical anchors do not necessarily entail parallel developmental trajectories [43], reinforcing the need to consider the selective processes emphasized in modernization theories [23,34].

At the same time, the strengthening of Universalism, Benevolence, and Security suggests a broader recalibration of societal priorities toward collective well-being, tolerance, and stability. These shifts likely result from the interplay of global and national phenomena, such as the pandemic crisis [13,15], ongoing globalization pressures, and the sociocultural implications of growing immigration [6]. The pattern confirms that periods of external

stress tend to amplify the need for security and reinforce prosocial orientations [23,24,48]. Notably, the decline in Conformity to its lowest historical level in 2020 (Figure 3, Table 2), coupled with the rise of Self-Direction, points to a growing questioning of traditional norms and a possible future intensification of societal tensions or adaptations [9,10].

The evolution of Portuguese values also reflects broader European sociocultural trends, marked by a strengthening of Self-Transcendence and oscillations along the axis between Openness to Change and Conservation [38,42]. However, national specificities remain evident, particularly when considering Portugal's historical trajectories of social and political change, extensively documented by authors such as Ramos [40] and Vala [38,48]. These developments carry significant implications for policymaking, as emerging societal expectations increasingly demand reforms in governance, social protection systems [5,11,12], environmental sustainability [7,16,17], and international cooperation [1]. Adapting national policies to these shifting value structures will be crucial for promoting sustainable development and enhancing social resilience [8–10].

For a deeper and more precise understanding of these dynamics, it will be essential for future research to disaggregate national-level trends by key sociodemographic variables. Differentiating value profiles across age cohorts [23,24,49,50], regions, educational levels, and occupational statuses—potentially using classifications such as those proposed by the ILO—is indispensable for unveiling intra-societal heterogeneities and latent tensions [25,44]. A nuanced view of these dimensions is crucial for anticipating societal transformations with greater accuracy.

Finally, maintaining an empirically grounded and theoretically robust debate around the evolution of human values, informed by frameworks such as Schwartz's [27,29] and datasets like the European Social Survey [26,28], remains vital. Continuous monitoring is fundamental for guiding public policies, fostering national development, and strengthening Portugal's strategic positioning within an increasingly complex and dynamic European and global environment [40,43].

6. Conclusions

This study provided an in-depth longitudinal analysis of the evolution of basic human values in Portugal between 2002 and 2020, grounded in the European Social Survey data and Schwartz's theoretical framework of Basic Human Values. The findings reveal that Portuguese society, in 2020, is characterized by a strong emphasis on Self-Transcendence values (Benevolence and Universalism) and a relative decline in Conservation values (Tradition, Conformity, and Security). This configuration suggests an adaptive societal response to profound socio-economic transformations over the past two decades, prioritizing social cohesion and solidarity over traditional stability and conformity.

The observed convergence with the value profiles of the United Kingdom and Hungary reinforces that Portugal's societal evolution is increasingly shaped by broader European and global cultural currents rather than remaining confined to Mediterranean traditions. The strengthening of Security, Universalism, and Benevolence values likely reflects the cumulative impacts of economic recovery, demographic shifts, globalization, and critical events such as the COVID-19 pandemic. Within Schwartz's circular structure of values, Portugal's movement indicates a dynamic repositioning towards Self-Transcendence and Openness to Change, accompanied by a weakening of values traditionally associated with Conservation and Self-Enhancement.

These findings underline the strategic importance of systematically monitoring human values in national policymaking processes. However, while the results provide valuable insights, the correlational nature of the ESS data limits the ability to infer causality. Future research should, therefore, prioritize the implementation of longitudinal mixed-

method designs—combining quantitative surveys with qualitative interviews—to capture the causal mechanisms underlying value shifts. Moreover, the disaggregation of trends by demographic variables such as age, education, income level, and region will be essential to unveil internal heterogeneities and anticipate potential societal tensions.

Particularly, the decline in Conformity alongside the strengthening of Self-Direction may signal emerging frictions between individual autonomy and collective norms, potentially affecting social cohesion. Understanding these dynamics will be critical for designing interventions that balance personal freedom with societal stability.

Thus, continuous and methodologically diverse monitoring of Basic Human Values, anchored in robust theoretical frameworks and attentive to internal differentiations, is indispensable for fostering a resilient, inclusive, and future-oriented Portuguese society in an increasingly interconnected global environment.

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Informed Consent Statement: Not applicable.

Data Availability Statement: Original Data are available at <https://ess.sikt.no/en/data-builder/> (accessed on 22 April 2025).

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Abbreviations

The following abbreviations are used in this manuscript:

BHVs	Basic Human Values
COVID-19	Coronavirus disease 2019
CPLP	Community of Portuguese Language Countries
ESS	European Social Survey
HOV	Higher-Order Values
PVQ	Portrait Values Questionnaire
RSI	Social Integration Income
UEFA	Union of European Football Associations
UK	United Kingdom

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