



European  
University  
Institute

DEPARTMENT  
OF HISTORY  
AND  
CIVILIZATION

## Beyond the ‘Imperial Mystique’:

Empire and National Identity in the Portuguese  
*Estado Novo* (c. 1930-1951)

Márcia Gonçalves

Thesis submitted for assessment with a view to  
obtaining the degree of Doctor of History and Civilization  
of the European University Institute

Florence, March 2015 (Defence)



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## **ABSTRACT**

Whilst being a period of consolidation for the Portuguese right-wing dictatorship known as *Estado Novo*, the 1930s and 1940s were marked by geopolitical change and major redefinition of mental maps about colonial order. This dissertation explores the intertwined dynamics between imperial and national identity discourses in Portugal during these turbulent decades, departing from the idea that they were mutually constitutive in metropolitan culture and were negotiated on an everyday basis to adjust to different challenges. In order to contest the idea that the Portuguese 1930s and 1940s were marked by a monolithic imperial-based nationalism stemming from the state apparatuses, this study moves beyond the investigation of major nationalist events and colonial propaganda. Instead, it explores the interplay between Nation and Empire through the lens of the contemporary debates about the Empire and Portuguese colonial status in the world that stood out in the public discussion during this period. Therefore, it looks at representations of Portugueseness and Portuguese colonialism's exceptionalism in five main themes: 1) the question of native forced labour in the Portuguese empire around the 1930 Forced labour convention, 2) European colonial claims for a new partition of Africa on the eve of the Second World War, 3) Portugal and its empire as a united nation, 4) colonial migration and settlement and 5) the specificity of the Portuguese national character and its impact on the national methods of colonisation.



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## INTRODUCTION

On 27<sup>th</sup> January 1930, the Portuguese newspaper with the largest circulation at the time, *Diário de Notícias*, published an interview with António de Oliveira Salazar. He had not yet taken office as head of government at the time. Salazar had been at the helm of Portugal's Finances since 1928 and had recently been appointed interim minister of Colonies, which motivated the interview. Salazar's nomination for the Colonies portfolio came as surprise, even though coming out of a rough governmental crisis ignited by the deep disaffection with the effects of his national-wide austerity policies in Portuguese Africa.<sup>1</sup> When asked about his first impressions of the new ministry, the dictator-to-be cleverly evaded the question and replied:

I have been there for five days... it is too little time to be able to satisfy your curiosity. However, it is enough time to think that it is the place on Earth where a Portuguese is able to feel better the pride of being a Portuguese. Nothing is

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<sup>1</sup> Francisco Cunha Leal, the President of the Bank of Angola, openly criticised Salazar's financial policies during a speech delivered at the Commercial Association of Lisbon. See Cunha Leal, Francisco (1930), *História do conflito entre um ministro das finanças e um governador do banco de Angola*, Lisbon. See also Wheeler, Douglas (1988), *A Ditadura Militar Portuguesa, 1926-1933*, Lisbon, Edições Europa-America and Filipe Ribeiro de Meneses's biography of Salazar, Meneses, Filipe Ribeiro (2010), *Salazar. A Political Biography*, New York, Enigma Books.

small when seen from there. That is not Terreiro do Paço [i.e. Lisbon's square where the ministry was located]... – it is the head of Empire.<sup>2</sup>

Salazar's answer is noteworthy. He had never publicly expressed any interest in the Empire beyond the balance sheet of national budgets prior to his appointment to the ministry of colonies. In fact, he would never visit any of the eight Portuguese colonies in Africa and Asia whose fate he controlled for the almost forty years that followed either. Yet, in *Diário de Notícias*' interview, the idea that Empire was a key element for the self-perception as a member of the Portuguese national community and the sense of greatness of Portugal seemed to be ingrained in his mind. A few months later, this conception was inscribed in the legal body of fundamental principles of the Nation as if it was an unquestionable truth. The Colonial Act (*Acto Colonial*), which replaced the section regarding colonial affairs on the Portuguese Constitution in force since 1911, included an intriguing and purely rhetorical article:

It is of the organic essence of the Portuguese Nation to perform the historical function of possessing and colonising overseas dominions and civilising the native peoples who are contained in them, exercising also the moral influence that belongs to it [the Portuguese nation] by virtue of its Patronage of the East.<sup>3</sup>

Being a colonial power was thus proclaimed to be part of the fundamental nature of being Portuguese. From this point of view, Empire and Nation were ontologically blended, being a single harmonious entity rather than two inseparable realities.

This dissertation is about this association, trying to understand in which way the Empire was part of what being Portuguese meant to the Portuguese themselves. It seeks to bring out the ways in which the colonial empire – or, more specifically, an idea or

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<sup>2</sup> 'Estou lá há cinco dias... Muito pouco tempo para poder satisfazer a sua curiosidade. Mas o bastante para pensar que é o lugar da terra onde um português sente melhor o orgulho de sê-lo. Nada é pequeno visto dali. Aquilo não é o Terreiro do Paço... - é a cabeça do Império!' *Diário de Notícias*, 27<sup>th</sup> January 1930, p. 1. This and all the following translations are my own, except if when stated otherwise.

<sup>3</sup> 'É da essência orgânica da Nação Portuguesa desempenhar a função histórica de possuir e colonizar domínios ultramarinos e de civilizar as populações indígenas que nêles se compreendam, exercendo também a influência moral que lhes é adstrita pelo Padroado do Oriente.' *Diário do Governo*, Decree no. 18 570, 8<sup>th</sup> July 1930.

ideas of Empire – and national identity were intertwined in metropolitan Portugal’s discourses during the establishment and consolidation of a new political regime in the 1930s and 1940s and how they can be located in relation to institutional developments and their national and international context. As such, its foundation can be placed at the intersection of two main historiographical fields, tying in debates on nation, nationalism, and national identity with the study of culture of empire ‘at home’.

### **‘We will be as we have always been’: (un)changeable national identities**

We will be as we have always been: Atlantic Europeans simultaneously turned to Europe, to the sea, and to the rest of the world. With eyes on the whole world, we will grow. And we know also how precious to Europe is our Atlantic and universalist vocation. (...) Given the complexity of the problems that afflict us, given the complexity of European constraints and major changes on the way, it may appear that we are now in ‘seas never before navigated’.<sup>4</sup> But true to our noblest traditions, we say with conviction that crossing ‘seas never before navigated’ never scared the Portuguese. With commitment and imagination, competence and transparency, with the calling of our best energies, we will overcome storms and subdue old fears and new difficulties.<sup>5</sup>

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<sup>4</sup> ‘By seas never before navigated’ is the 3<sup>rd</sup> stanza from Luís Vaz de Camões’s *The Lusiads*, the Portuguese epic poem the XVI century centred on Vasco da Gama’s first voyage to India (but celebrating other “heroic” events of Portuguese history as well). Due to its overuse, it is at least vaguely familiar to most Portuguese people.

<sup>5</sup> ‘Seremos como sempre fomos: europeus atlânticos, virados simultaneamente para a Europa, para o mar e para o resto do mundo. É com os olhos postos no mundo inteiro que voltaremos a crescer. E também sabemos quão preciosa é para a Europa a nossa vocação atlântica e universalista. (...) Perante a complexidade dos problemas que nos assolam, perante a complexidade das condicionantes europeias e as grandes mudanças em curso, poderá parecer que estamos agora em «mares nunca dantes navegados». Mas fiéis às nossas mais nobres tradições dizemos convictamente que atravessar «mares nunca dantes navegados» jamais assustou os Portugueses. Com empenho e imaginação, competência e transparência,

Salazar was not the author of the previous inspired telling words nor were they written at a time Europe faced major constraints of the Second World War, as it might seem on a first reading. In fact, they date back June 2011: their author is no less a person than Pedro Passos Coelho, the Portuguese prime minister currently in office, and they are part of the speech given on the inauguration of the XIX Constitutional Government of Portugal, elected less than a month after a IMF-EU bailout package for Portugal had been approved. The powerful grip that Atlantic and universalist vocations, maritime traditions, talents to overcome figurative storms and distresses, and other myths related with the Portuguese imperial past still hold on Portuguese imagination on the twentieth-first century behoves us to explore the ways national identities take form and reflect on why and how these myths continue to play such an essential role for the definition of what a collective ‘we’ – the Portuguese – are, ‘will be and have always been’.

Scholars on nationalism and nationalist movements maintain a on-going debate on the origins of modern nations, either arguing that they were built on pre-modern communities or ‘ethnies’ or considering them as a product of modernisation, being related with industrialisation, urbanisation and state-making.<sup>6</sup> Despite their divergences, the conception that the traits that define and distinguish members of a nation are innate or transmitted without change from one generation to the next since time immemorial – in short, the idea that there is a ‘we’ that was, is and will always be invariable –, has long been refuted by both perennialist/ ethno-symbolist and modernist/constructivist

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com a convocação das nossas melhores energias transporemos as tormentas e vergaremos velhos medos e novas dificuldades.’ Pedro Passos Coelho’s discourse on 21<sup>st</sup> June 2011, available online at the Government’s official site: <http://www.portugal.gov.pt/pt/os-ministerios/primeiro-ministro/intervencoes/20110621-pm-tomada-posse.aspx> (last retrieved on 20<sup>th</sup> August 2014).

<sup>6</sup> Literature on this topic is vast. On the historical roots of modern nations, see, for instance, Smith, Anthony D. (1986), *The Ethnic Origins of Nations*, Oxford, Blackwell and Smith, Anthony D. (1991), *National Identity*, Harmondsworth, Penguin, as well as Hastings, Adrian (1997), *The Construction of Nationhood. Ethnicity, Religion, and Nationalism*, Cambridge, Cambridge University Press; on the contestation of nations’ pre-modern origins, see Gellner, Ernest (1983), *Nations and nationalism*, Oxford, Blackwell; Hobsbawm, Eric (1990), *Nations and Nationalism since 1870. Programme, Myth, Reality*, Cambridge, Cambridge University Press; Hobsbawm, Eric and Terence Ranger (1983) (eds.), *The Invention of Tradition*, Cambridge, Cambridge University Press; Anderson, Benedict (1991 [1983]), *Imagined Communities. Reflections on the Origin and the Spread of Nationalism*, London – New York, Verso.

theorists. I will not look at the debate between these major trends in detail here.<sup>7</sup> In a few words, what separate them is not only a different perspective on the timing of nations – ‘when is a nation?’<sup>8</sup> – but also whether nations rely on a political community whose members identify with norms and symbols created by the state they belong to or, quite the reverse, are led from below, being formed around a community whose members shared customs, values, myths, memories, and ancestry. However, even Anthony D. Smith, author of one of the staunchest criticisms of modernist approaches,<sup>9</sup> acknowledges the importance of modern political and intellectual elites in the translation of the pre-modern ethnic core of a nation into viable national identities with which elements of the community are able to identify. In Anthony D Smith’s words, ‘it took the labours of the intellectuals to discover this common history and, through it, to help endow their respective populations with a sense of unique identity’.<sup>10</sup> Hence, the framework set out to establish a unified nation – either one invented, imagined or with a real ancient basis – is consciously cultivated in order to promote a selected vision of national identity.

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<sup>7</sup> A comprehensive overview of different perspectives on nation and nationalism studies, its differences and similarities is itself matter for an entire doctoral thesis, as Umut Özkırmılı showed us. His thesis has initially been published by St. Martin’s Press. Özkırmılı, Umut (2000), *Theories of Nationalism. A Critical Introduction*, New York, St. Martin’s Press. See also McCrone, David (1998), *The Sociology of Nationalism*, London-New York, Routledge.

<sup>8</sup> Connor, Walker (1990), ‘When is the nation?’, *Ethnic and Racial Studies*, 13 (1), pp. 92-103. See also Ichijo, Atsuko and Gordana Uzelac (eds) (2005), *When is the Nation? Towards an understanding of theories of nationalism*, London, Routledge

<sup>9</sup> See, for instance, Smith, Anthony D. (1998), *Nationalism and modernism*, London, Routledge and Smith, Anthony D. (2000), *The Nation in History. Historiographical Debates about Ethnicity and Nationalism*, Cambridge, Polity Press.

<sup>10</sup> Smith, Anthony D. (1981), *The Ethnic Revival*, Cambridge, Cambridge University Press, p. 69. See also Smith, Anthony D. (1999), ‘The Problem of National Identity: Ancient, Medieval and Modern?’, *Myths and Memories of the Nation*, Oxford, Oxford University Press, pp. 97-123. To be sure, there is nothing original here: Smith’s statement immediately brings to mind Maurice Halbwachs’s reflections on collective memory, especially his study about the making, un-making, and re-making of Christian memory lead by elites, *La Topographie légendaire des Évangiles en Terre sainte. Étude de mémoire collective* (1941). An English translation of its conclusion can be found in Halbwachs, Maurice (1992), *On collective memory*, Chicago, The University of Chicago Press, pp. 193-235.

Portugal has usually fallen off the map of general theories about nationalism.<sup>11</sup> The topic has received limited and tardy attention in Portuguese historiography, too. Nuno Gonçalo Monteiro and António Costa Pinto have suggested that the lack of interest in the field is related to the fact that Portugal has been a political entity with roughly stable frontiers since the thirteenth century and with a very precocious linguistic homogeneity within these boundaries. As a consequence, the Portuguese nation's existence is commonly taken for granted.<sup>12</sup>

Medievalist José Mattoso suggests that Portugal was already a consolidated nation in the first half of the thirteenth century.<sup>13</sup> His claim is predicated on the fact that the Portuguese territorial boundaries had already been outlined, official Portuguese language and coins had already been defined by royal decree and some symbols – which still persist in Portuguese national culture nowadays and have made part of every Portuguese national flag until the present date – had already been associated with the Portuguese kingdom. Mattoso argues that there was also a clear 'notion of national identity' at the time, even though he acknowledges that there was no evidence of awareness of being Portuguese outside the Court society.<sup>14</sup> One could ask whether that supposed notion of national identity found in the first half of the thirteenth century within the Court was really associated with an interiorised sense of belonging to Portugal or rather stemmed from loyalty to the monarch on whom the Court members depended, being dissociated from an presumed Portuguese community.<sup>15</sup> On a later

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<sup>11</sup> In fact, Ernest Gellner has explicitly excluded 'the strong dynastic states of the Atlantic seaboard of Europe' from his theorisation on nationalism from the very first moment. See Gellner, Ernest (1964), *Thought and Change*, Chicago, Chicago University Press, p. 173.

<sup>12</sup> Monteiro, Nuno G. and António Costa Pinto (2003), 'Cultural Myths and Portuguese National Identity' in Pinto, António Costa (2003) (ed.), *Contemporary Portugal. Politics, Society, and Culture*, New York, Columbia University Press, ch. 2, pp. 47-48

<sup>13</sup> Mattoso, José (1985), *Identificação de um país: ensaio sobre as origens de Portugal, 1096-1325*, Lisbon, Editorial Estampa.

<sup>14</sup> Mattoso, José (1985), *Identificação de um país: ensaio sobre as origens de Portugal, 1096-1325*, op. cit., 2<sup>nd</sup> volume, p. 211.

<sup>15</sup> Francisco Bethencourt has drawn attention to the fact that the fight to regain Portugal's independence from Spain in 1640, albeit undertaken in the name of the nation, was motivated by the loss of economic, political, and social privileges experienced by Portuguese nobility after the unification of the Iberian kingdoms. See Bethencourt, Francisco (1991), 'A sociogénese do sentimento nacional' in Francisco Bethencourt and Diogo Ramada Curto

essay Mattoso stressed that this lack of general national consciousness could still be observed at the end of the nineteenth century: amongst working-class members, local identities prevailed over national identification; in fact, the author went further to suggest that the awareness regarding the belonging to Portugal was at times completely non-existent within lower social class.<sup>16</sup> Also José Manuel Sobral, an anthropologist who has been working on Portuguese nationalism since the 1990s, has argued that the dissemination of a sense of Portugueseness was weak before the late 1800s.<sup>17</sup>

The reason for the late emergence of a widespread national consciousness might be related with the linguistic homogeneity and longstanding frontiers that makes the existence of the nation apparently unquestionable. As Anne-Marie Thiesse noted, the formation of national identities is a militant undertaking that involves a political project, being associated with the necessity to nationalise the members of a determined political unity.<sup>18</sup> Creating and spreading a national language is the primary step of the process, as it is essential to facilitate communication and make the inculcation of national values and myths possible. In Portugal, linguistic diversity was not an obstacle. Lest it be thought that the members of the early Portuguese political unity were a unified community and it was not necessary to nationalise the Portuguese. However, lacking the

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(eds.), *A Memória da Nação*, Lisbon, Livraria Sá da Costa, pp. 473 – 503, especially pp. 482-483. See also Silva, Ana Cristina Nogueira and António Manuel Hespanha (1993), 'A Identidade Portuguesa', in António Manuel Hespanha (ed), *O Antigo Regime*, Lisbon, Círculo de Leitores, pp. 19-37.

<sup>16</sup> Mattoso, José (1998), *A Identidade Nacional*, Lisbon, Gradiva, p. 14.

<sup>17</sup> Sobral, José Manuel (1996), 'Nações e nacionalismo: algumas teorias recentes sobre a sua génese e persistência na Europa (ocidental) e o caso português', *Inforgeo*, 11, pp. 13-41 and Sobral, José Manuel (2003), 'A formação das nações e o nacionalismo: os paradigmas explicativos e o caso português', *Análise Social*, XXXVII (165), pp. 1093-112; Sobral, José Manuel (2004), 'O Norte, o Sul, a Raça, a Nação - Representações da Identidade Nacional Portuguesa (séculos XIX-XX)', *Análise Social*, XXXIX (171), pp. 255-284; Sobral, José Manuel (2010), 'Povo, Nação, Raça: Representações da Identidade Nacional Portuguesa no Século XX' in José Neves (ed.), *Como se Faz um Povo: Ensaios em História Contemporânea de Portugal*, Lisbon, Tinta-da-China, pp. 167-181, Sobral, José Manuel (2012), *Portugal, Portugueses: Uma identidade Nacional*, Lisbon, Fundação Francisco Manuel dos Santos. See also Cabral, Manuel Villaverde (2003), 'A identidade nacional portuguesa: conteúdo e relevância', *Dados*, 46(3), pp. 513-533.

<sup>18</sup> Thiesse, Anne-Marie (1999), *La création des identités nationales: Europe XVIIIe-XXe siècle*, Paris, Editions du Seuil. See also Thiesse, Anne-Marie et al. (2007), 'La nation, une construction politique et culturelle', *Savoir/Agir*, 2, pp. 11-20.

pressing need to forge a nationally homogeneous community to affirm itself as an autonomous, united, and unique nation, hindered the creation and dissemination of a Portuguese collective 'we'. Despite the establishment of the kingdom of Portugal in 1143, Portuguese national identity was not a medieval creation.

By 'national identity', I mean an instilled and interiorised sense of self that places individuals or groups in a meaningful way in the world, construing it with reference to a nation for both internal integration and international positioning. I take 'nation' as a discursive construction, conceiving 'discourse' in a Foucauldian-inspired fashion as a particular way of speaking and thinking about reality – in other words, a particular way of representing reality – that informs and is informed by social practises.<sup>19</sup> I follow Benedict Anderson's enjoinder to think nation as a 'imagined political community'.<sup>20</sup> Anderson stressed that being imagined does not imply being imaginary: even though nations are not natural, 'communities are to be distinguished, not by their falsity/genuineness, but *by the style in which they are imagined*'.<sup>21</sup> It is exactly the *style* in which Portugal and the Portuguese were imagined that this thesis aims to capture.

Nations are reified by imbuing people with a deep sense of belonging, bonding them together around a community that recognises itself in the institution of a state of 'its own' and in opposition to other national communities or states. As Étienne Balibar notes, the reason why a nation is not a mere idea or arbitrary abstraction has to do with the fact that, 'through a network of apparatuses and daily practices, the individual is instituted as *homo nationalis* from cradle to grave'.<sup>22</sup> Discourse lies at the centre of these apparatuses and daily practices, of the continual reminding of national belonging in

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<sup>19</sup> Foucault, Michel (1981 [1971]), 'The order of discourse' in Robert Young (ed.), *Untying the text: a post-structural anthology*, Boston, Routledge & Kegan Paul, ch. 3, pp. 48- 78. See also Foucault, Michel (2002 [1969]), *The Archaeology of Knowledge*, London - New York, Routledge.

<sup>20</sup> Anderson, Benedict (1991 [1983]), *Imagined Communities. Reflections on the Origin and the Spread of Nationalism*, London - New York, Verso, p. 7.

<sup>21</sup> Idem, p.6. Emphasis added.

<sup>22</sup> Balibar, Étienne (1991), 'The Nation Form: History and Ideology' in Étienne Balibar and Immanuel Wallerstein, *Race, Nation, Class. Ambiguous Identities*, London - New York, Verso, p. 93, p. 96.

everyday life.<sup>23</sup> It is because identities ‘are constructed within, not outside, discourse’, as Stuart Hall suggest, that we need to ‘understand them as produced in their specific historical and institutional sites within specific discursive formations and practices’.<sup>24</sup> As the historical and institutional sites change, so do discourses on national identity.

Moreover, as Katherine Verdery pointed out, different social groups within a single nation-state have different interpretations of what it means to be a national member: the meaning of what the nation is and is not is the result of a balance of social forces between competing agents.<sup>25</sup> National identity discourses are thus in a continuous process of transformation, being adapted and readapted in response to different balances of forces and different political and geopolitical contexts, combining different and sometimes conflicting trends of thinking about the nation that coexist in any society at any time. While the openness to different ways of thinking might be lower in dictatorial, repressive societies like Portugal in the 1930s and 1940s, it is important to keep in mind that national identities are never unitary or coherent, changing in terms of their contents and structure.

Yet, despite not being fixed or homogeneous, national identities incorporate recurrent elements of identification. While the Empire seems to be a steady – if not the steadiest – element in discourses of Portugueseness, being a constitutive part of Portugal’s culture and national identity before, during, and after *Estado Novo*, its instrumentalisation was itself subject to transformation and adjustment. It cannot be explained in terms of internal forces only, without reference to its international context, as defining what is national is always a relational practice. It was the result of an uninterrupted and creative reconstruction constrained by the events, concerns, pressures, and fears that characterised the wider society in which this process took place. This pliability of national identity discourses, I will later argue in this introduction, is missing from the existing approaches to ideas of empire and nation in metropolitan culture in

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<sup>23</sup> Michael Billig has clarified the distinction between what he calls an everyday and somehow unconscious ‘banal nationalism’ and a more active nationalism of a flag waving variety. Billig, Michael (1995), *Banal Nationalism*, London, Sage.

<sup>24</sup> Hall, Stuart ( 1996), ‘Introduction: Who needs “Identity”?’ in Stuart Hall and Paul du Gay (eds.), *Question of Cultural identity*, London, Sage Publications, p. 4.

<sup>25</sup> Verdery, Katherine (1993), ‘Whither “Nation” and “Nationalism”?’ *Daedalus*, 122 (3), pp. 37-46.

Portugal during the 1930s and 1940s, which remain focused on official colonial ideology and the nationalist propaganda apparatus that supported it.

### **‘Empire at home’: imperialism and metropolitan culture**

In 1984, John M. Mackenzie’s *Propaganda and Empire* stirred the debate on the impact of imperialism in metropolitan cultures.<sup>26</sup> Mackenzie explored what he calls the ‘centripetal effects of Empire’, rejecting the approaches that looked at the British Empire as a metropolitan creation unilaterally radiating influence outward from the central metropole to its peripheral colonies. Studying informal imperial propaganda in Britain from the late nineteenth century to mid-twentieth century, Mackenzie turned away from the focus on high politics and economy. By doing so, he showed that colonialism’s repercussions on metropolitan societies were not only economic or political but also cultural. As John M. Mackenzie later put it, ‘Empire constituted a vital aspect of national identity and race-consciousness, even if complicated by regional, rural, urban, and class contexts’.<sup>27</sup>

*Propaganda and Empire*, together with the Studies in Imperialism series that Mackenzie edited for Manchester University Press,<sup>28</sup> was a path-breaking work, being

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<sup>26</sup> MacKenzie, John M. (1984), *Propaganda and Empire. The Manipulation of British Public Opinion, 1880 - 1960*, Manchester - New York, Manchester University Press.

<sup>27</sup> MacKenzie, John M. (1999), ‘Empire and Metropolitan Cultures’, in Wm. Roger Louis (ed.), *The Oxford History of the British Empire*, Oxford, Oxford University Press, vol. III. Andrew Porter (ed.), *The Nineteenth Century*, p. 292.

<sup>28</sup> Now co-edited by Andrew Thompson, the Studies in Imperialism series will celebrate its 100<sup>th</sup> publication with a special volume due in October 2014. Thompson, Andrew (2014), *Writing Imperial Histories*, Manchester, Manchester University Press. From the first volumes focused on particular media of promotion of imperialism (such as school, music-halls, children’s literature), the series has evolved to a more encompassing view of empire, yet still very aligned with British social history tradition and still showing little openness to theoretical framework offered by postcolonial approaches.

in the lead for contesting the ‘minimal impact thesis’.<sup>29</sup> The proponents of this thesis argue that European colonialism was the project of political, military, and trade elites only and that common people in Europe were not significantly affected by the imperial project, let alone cared about the empire. Amongst the current advocates of the minimal impact thesis, Bernard Porter is the most prominent and vocal critic of John M. Mackenzie and his followers’ work.<sup>30</sup> In Porter’s perspective, they gave rise to an exaggerated idea of the pervasiveness of Empire in British society and culture, seeing manifestations of imperial mentality everywhere. The reason for this false evidence of imperial popular culture – Bernard Porter argues – has to do with two factors: first, an excessively encompassing notion of what is imperialism, which allows the classification of non-imperial issues as imperial; second, the extraction of imperial evidences of national culture without being aware of what lied around and consequently overvaluation of their weight.

In order to avoid these shortcomings, Porter adopts a very restricted and literal definition of imperialism, which only comprises an explicit desire for domination, possession and/or control.<sup>31</sup> A similar approach had been adopted by Thomas G. August in his 1985 comparative study of the attempts to promote imperialism in Britain and France, *The Selling of the Empire*.<sup>32</sup> By imperialism, August meant an ideology based

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<sup>29</sup> On the ‘minimal impact thesis’, see Stuart Ward’s introductory essay to *British Culture and the End of Empire* in Stuart Ward (2001) (ed.), *British Culture and the End of Empire*, Manchester, Manchester University Press. While Stuart Ward argues that the ‘minimal impact thesis’ has a stronger presence in studies on the end of Empire and its aftermath, it was the dominant perspective found in historiography on the British Empire before the 1980s.

<sup>30</sup> See Porter, Bernard (2004), *The Absent-Minded Imperialists. Empire, Society, and Culture in Britain*, Oxford, Oxford University Press Porter, Bernard (2008), ‘Further Thoughts on Imperial Absent-Mindedness’, *The Journal of Imperial and Commonwealth History*, 36 (1), pp.101 – 117; Mackenzie, John M. (2008), “‘Comfort’ and Conviction: A Response to Bernard Porter”, *The Journal of Imperial and Commonwealth History*, 36 (4) pp. 659 – 668. See also David Cannadine’s *Ornamentalism*, in which the author aims to demonstrate that ‘the British Empire was first and foremost a class act’, meaning little to people that did not belong to upper social strata. Cannadine, David (2001), *Ornamentalism. How the British Saw Their Empire*, London, Penguin Books, p. 10.

<sup>31</sup> Porter, Bernard (2004), *The Absent-Minded Imperialists. Empire, Society, and Culture in Britain*, op. cit., pp. 7-24.

<sup>32</sup> August, Thomas G. (1985), *The Selling of the Empire. British and French Imperialist Propaganda, 1890 - 1940*, Westport - London, Greenwood Press

on the concept of empire as a ‘way of life’ that presupposes a consciousness of its economic, military, and political importance and an active search for a tighter connection between all its components in a spirit of national unity.<sup>33</sup> As a consequence, he concludes that, notwithstanding the increase of the information about the colonies from 1890 to 1940 in both metropolises, imperialist ideology failed to win widespread acceptance and an imperial mentality was not developed neither in France or Britain. In contrast, in Mackenzie’s *Propaganda and Empire*, imperialism is understood as a ‘way of seeing’ the world, embracing a unique imperial status and cultural and racial superiority of the British, rather than a formal and sophisticated conceptualisation of Empire and colonial order.<sup>34</sup>

This conceptual question is critical here. In my approach to the interplay between empire and national identity in Portugal, I share Mackenzie’s view that ‘empire’ as a category of analysis of metropolitan culture must be understood in its broadest sense. That is to say, both abstract ideas about what the empire was (even if completely detached from colonial realities) and elaborated conceptions that circulated only amongst Portuguese colonial intelligentsia are valuable displays of the ways in which the empire and Portugal as a colonial power were imagined by their contemporaries. From this perspective, disseminated imperial ideas that obeyed the dynamics of myth were not less significant than the ones that obeyed the logic of colonial reality. In fact, I will try to show that they could coexist in the mind of the same individual, being mixed and mingled to create and disseminate representations of a particular Portuguese way of being an imperial people that were suitable for the specific context encountered at the time.

The work of Edward Said has also been of great importance for study of the interconnectedness of imperialism and metropolitan culture. The publication of his *Orientalism* marked a turning point, paving the way for the penetration of a range of postcolonial, feminist, and cultural studies influences into historical research.<sup>35</sup> Influenced by the work of Frantz Fanon and drawing on Foucault’s notion of discourse

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<sup>33</sup> August, Thomas G. (1985), *The Selling of the Empire*, op. cit. p. 50-51.

<sup>34</sup> Mackenzie, John M. (2003 [1984]), *Propaganda and Empire*, p. 149.

<sup>35</sup> Said, Edward (1979), *Orientalism*, New York, Vintage Books – Random House

and Gramsci's notion of hegemonic power and 'subaltern' resistance, Said brought to light the way in which colonial discourse constructed the colonial subject, i.e. the way in which the Orient and its peoples were actually produced by Western Europeans. His argument on the link between culture and colonialism was consolidated with a pioneering analysis of 'narratives of empire' in fictional and historical texts in *Culture and Imperialism*.<sup>36</sup> By doing so, he aimed to disclose 'the formation and meaning of Western cultural practices themselves'.<sup>37</sup> In other words, colonial discourse did not only construct the colonised but also influenced culture in the imperial centre, constructing the coloniser as well. Empire was, thus, at the heart of European culture.

Edward Said's has informed a novel generation of scholars concerned with the connected national and imperial past, giving an important impulse to both the field of cultural studies and a new imperial and postcolonial history.<sup>38</sup> While John M. Mackenzie's seminal work continues to influence the study of the relationship between imperial and metropolitan cultures,<sup>39</sup> there is now a vast and continuously growing

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<sup>36</sup> Said, Edward (1993), *Culture and Imperialism*, New York, Alfred A. Knoff

<sup>37</sup> Idem, p. 191.

<sup>38</sup> For a overview on the evolution of these new trends, see Hall, Catherine (2000), 'Introduction: Thinking the postcolonial, thinking the empire' in Idem (ed), *Cultures of Empire*, pp. 1-33; Colley, Linda (2002), 'What Is Imperial History Now?' in David Cannadine (ed.), *What Is History Now*, Basingstoke, Palgrave Macmillan, pp. 132-147; Wilson, Kathleen (2004), 'Introduction: histories, empires, modernities', in Idem (ed.), *A New Imperial History: Culture, Identity, and Modernity in Britain and the Empire, 1660-1840*, Cambridge, Cambridge University Press, pp. 1-27; Cooper, Frederick (2005), 'Postcolonial Studies and the Study of History' in Loomba, Ania, Suvir Kaul, Matti Bunzi, Antoinette Burton and Jed Esty (eds.), *Postcolonial Studies and Beyond*, Durham and London, Duke University Press, pp. 401-422; Bush, Barbara (2006), *Imperialism and Postcolonialism*, Harlow, Person Education; Howe, Stephen (2010), 'Introduction. New Imperial Histories', in Stephen Howe (ed.), *The New Imperial Histories Reader*, London, Routledge. For a criticism of the postmodern and postcolonial approaches originated in literary and cultural studies, see Washbrook, D. A. (1999), 'Orient and Occident: Colonial Discourse Theory and the Historiography of the British Empire' in Wm. Roger Louis (ed.), *The Oxford History of the British Empire*, vol. V, *Historiography*, Oxford, Oxford University Press, ch. 38, pp. 596-611.

<sup>39</sup> On Britain, Webster, Wendy (2005), *Englishness and Empire. 1939-1965*, Oxford, Oxford University Press, Thompson, Andrew (2005), *The Empire Strikes Back? The Impact of Imperialism on Britain from the Mid-Nineteenth Century*, Harlow, Person Longman Kaul, Chandrika (2006)(ed.), *Media and the British Empire*, Basingstoke, Palgrave; on France, Chafer, Tony e Amanda Sackur (2002) (eds.), *Promoting the Colonial Idea. Propaganda and Visions of Empire in France*, Basingstoke, Palgrave, Evans, Martin (2004) (ed.), *Empire and Culture. The French Experience, 1830 - 1940*, Basingstoke, Palgrave; on Italy, Finaldi, Giuseppe (2002), *Italy's "culture of colonialism" and the Prima Guerra d'Africa*, Florence, European University Institute (Unpublished Dissertation); on Belgium, Stanard, Matthew (2011),

literature exploring the repercussions of the Empire ‘at home’ that moved beyond the study of formal or informal imperial propaganda. Even though almost entirely focused on Britain, these approaches have shown that from the late eighteenth century, national identity and race, class, and gender identification and differentiation in metropolitan society were all formulated and articulated in reference to colonised subjects.

Noteworthy is Antoinette Burton's *Burdens of History*, which explored the ways feminists constructed and exploited a stereotype of Indian womanhood to reinforce their own efforts of emancipation in Victorian and Edwardian Britain.<sup>40</sup> While instrumentalising the contemporary notion of women's moral authority to fuel the consolidation of feminism as a political movement, British feminists also outlined women's historic achievements in the British past and reclaimed the responsibility for colonised women as a ‘white women’s burden’. The Empire – or the idea of Empire – was, thus, the ‘door’ through which women could enter public sphere, claiming for themselves an important role as members of the nation and affirming their national identity and national pride.

Also of note is Catherine Hall’s acclaimed *Civilising Subjects*.<sup>41</sup> Hall explores the representations of Jamaica and Jamaican black population in the mid-nineteenth century and the ways in which they shaped the English political, social and racial thought, being focused on Baptist Church. The main argument is that being a coloniser played a central role in the construction of Englishness. The transformations of the attitudes on race, from the missionary idealist visions in the 1820s and 1830s to the disenchantment in the following decade, cannot be understood separately. In both cases, the belief of sameness

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*Selling the Congo, A History of European pro-empire propaganda and the making of Belgian imperialism*, Lincoln and London, University of Nebraska Press. See also the collective volume: Mackenzie, John M. (2011) (ed.), *European empires and the people. Popular responses to imperialism in France, Britain, the Netherlands, Belgium, Germany and Italy*, Manchester, Manchester University Press.

<sup>40</sup> Burton, Antoinette (1994), *Burdens History. British Feminists, Indian Women, and Imperial Culture, 1865-1915*, Chapel Hill, The University of North Carolina Press. See also Burton, Antoinette (1990), ‘The White Women’s Burden: British Feminism and the Indian Woman, 1865-1915,’ *Women’s Studies International Forum*, 13(4), pp. 295-308.

<sup>41</sup> Hall, Catherine (2002), *Civilising Subjects. Metropole and Colony in the English Imagination, 1830-1867*, Cambridge, Polity Press. More recently, Catherine Hall co-edited with Sonya O. Rose a collective volume about the ways Empire’s presence within the metropole shaped people’s identities and their daily lives in Britain. Hall, Catherine and Sonya O. Rose (2006) (eds.), *At Home with the Empire. Metropolitan Culture and the Imperial World*, Cambridge, Cambridge University Press

of human nature, which guide antislavery activities, was replaced with the reinforcement of a white nationalism. Hence, the Empire was a screen where the merits of English culture and the role of England as the most civilised nation in the world could be projected, fomenting and disseminating ideas about national superiority.

The relevance of Antoinette Burton's study on imperial feminism in Britain in the late nineteenth and early twentieth centuries and Catherine Hall's research on Baptist missionary discourse in Jamaica and England between 1830 and 1867 for a research project about 1930s and 1940s Portugal might not be obvious at first. Nevertheless, they have much influenced my approach to the ways in which nationalism, imperialism, and patterns of thought about and perception of the Portuguese Empire were entangled, inducing me to look more carefully at the diversity of *loci* where this multifarious entanglement could be found. Unlike Linda Colley's groundbreaking *Britons*<sup>42</sup> or Kathleen Wilson's also inventive *The Sense of the People*,<sup>43</sup> which attested the close interdependence of national and imperial identities in Britain by focusing on metropolitan political culture, Burton's *Burdens of History* and Hall's *Civilising Subjects* unveiled this same interdependence by exploring feminist anxieties regarding Indian women's condition or missionary concerns with abolitionism. To put it simplistically, they both made evident that the empire does not merely appear as a key dimension of national identity when social actors think and discuss what the nation is; thinking and discussing the empire was *per se* a prolific field for developing and creating new ideas about the nation, impelling and affirming national identity.

This question of focus is determinative in my approach to the interconnectedness of empire and nation during Portuguese *Estado Novo*. Conceptions of nation and national identities are not the starting point of my research but rather the final destination and the Empire is the vehicle to reach it.

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<sup>42</sup> Colley, Linda (2003 [1992]), *Britons. Forging the Nation, 1707-1837*, London, Pimlico.

<sup>43</sup> Wilson, Kathleen (1995), *The Sense of the People. Politics, Culture and Imperialism in England, 1715-1785*, Cambridge, Cambridge University Press

## Estado Novo and the *Imperial Mystique*: historiography and contexts

Research on the Portuguese *Estado Novo* is now a consolidated academic field. Having gained momentum in the 1980s, its initial focus was mainly on the nature of the Portuguese regime and its place on the typology of European right-wing authoritarianism in the interwar period. The central question was whether *Estado Novo* was a fascist regime: was Salazar's Portugal similar to Mussolini's Italy? The answer to this question still remains controversial: for some, there were no substantial differences between Salazar's and Mussolini's political systems and *Estado Novo* was a fascist regime;<sup>44</sup> others argue that, albeit being inspired in the corporatist structure of Mussolini's fascism and sharing its hyper-nationalism, anti-parlamentarism, populism, and paramilitarism, *Estado Novo* lacked some of its totalitarian and expansionist features, making it a distinct political regime.<sup>45</sup>

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<sup>44</sup> Cabral, Manuel Villaverde (1976), 'Sobre o fascismo e o seu advento em Portugal: ensaio de interpretação a pretexto de alguns livros recentes', *Análise Social*, 48, pp. 873-915; Cabral, Manuel Villaverde (1982), 'O Fascismo português em perspectiva comparada', in AAVV, *O Fascismo em Portugal*, Lisbon, A Regra do Jogo, pp. 19-30; Nunes, João Arsénio (1987), 'A formação do Estado fascista em Portugal à luz da correspondência diplomática britânica (1926-1933)', in AAVV, *O Estado Novo. Das Origens ao fim da autarcia. 1926-1959*, Lisbon, Fragmentos, volume I, pp. 189-198; Loff, Manuel (1996), *Salazarismo e Franquismo na época de Hitler (1936-1942)*, Oporto, Campo das Letras; Loff, Manuel (2008), "*O Nosso século é fascista!*" *O mundo visto por Salazar e Franco (1936-1945)*, Oporto, Campo das Letras.

<sup>45</sup> See, for instance, Lucena, Manuel (1984), 'Interpretações do salazarismo: notas de leitura crítica I', *Análise Social*, 83, pp. 423-451; Payne, Stanley (1986), 'Fascism and Right Authoritarianism in the Iberian World: the last Twenty Years', *Journal of Contemporary History*, 21 (2), pp. 163-177; Gallagher, Tom (1990), 'Conservatism, Dictatorship and Fascism in Portugal' in Martin Blinkhor (ed.), *Fascists and Conservatives*, London, Routledge, ch. 9, pp.157-175; Lucena, Manuel (1994), 'Notas para uma teoria dos regimes fascistas', *Análise Social*, 125-126, pp. 9-32; Pinto, António Costa (1995), *Salazar's Dictatorship and European Fascism. Problems of interpretation*, New York, Columbia University Press; Levy, Carl (1999), 'Fascism, National Socialism and Conservatives in Europe, 1914-1945: Issues for Comparativists', *Contemporary European History*, 8 (1), pp. 97-126. Torgal, Luís Reis (2003), 'Estado Novo Português - Estado Totalitário?' in Christiane Marques Szesz et al (eds),

António de Oliveira Salazar would have aligned with the latter trend, obviously defending the uniqueness of his regime. During the opening session of the first congress of *União Nacional* (the ‘National Union’, which was the only legal political party) in 1934, he addressed the distinction between the Portuguese dictatorship, on the one hand, and other conservative authoritarian regimes in Europe, on the other. He recognised there were some similarities but argued that they were limited to the establishment of a corporatist model in these societies, as well as the nationalist and patriotic commitment with the betterment and regeneration of their nations. He stressed that there was a particular aspect that made all the difference between Portugal and the rest. Nor surprisingly, this key element was the colonial empire. Still, it is worth quoting:

Among the dominant features of our nationalism that clear distinguish it from all other adopted by authoritarian regimes in Europe, it is *the Portuguese colonial potential*. It is not something improvised in recent times, being rather rooted in the nation's soul by centuries. It is (...) one of the largest components of our collective forces, [being] linked to the humanitarian purpose of evangelisation and to our independence in the [Iberian] peninsula. *It is and has always been like this*: the difference is that today we have a redoubled love that leads us to work for the sake of the Empire bequeathed by our greatest ancestors.<sup>46</sup>

His words are self-explanatory.

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*Portugal-Brasil no século XX. Sociedade, Cultura e ideologia*, Bauru, São Paulo, EDUSC, pp. 127-164; Torgal, Luís Reis (2009), ‘Estado Novo e “fascismo”’ in Idem, *Estados Novos, Estado Novo. Ensaios de História Política e Cultural*, Coimbra, Imprensa da Universidade de Coimbra, vol. 1, ch. VI, pp. 289-367. For an overview of the relationship between Portuguese fascists and *Estado Novo*, including their attempts to overthrow Salazar’s regime, see Medina, João (1978), *Salazar e os Fascistas. Salazarismo e Nacional-sindicalismo, a história de um conflito 1932-1935*, Lisbon, Livraria Bertrand and Pinto, António Costa (2000), *The Blue Shirts. Portuguese Fascists and the New State*, New York, Columbia University Press.

<sup>46</sup> ‘Entre as características dominantes do nosso nacionalismo e que bem o distinguem de todos os outros adoptados pelos regimes autoritários da Europa, está a potencialidade colonial dos portugueses, não improvisada em tempos recentes mas radicada pelos séculos na alma da Nação. Ela constitui (...) uma das maiores forças componentes do nosso ideal colectivo, ligada, demais, ao fim humanitário da evangelização e à nossa independência peninsular- Foi sempre assim: a mais só temos hoje o redobrado amor que nos leva a trabalhar pela causa do Império legado pelos nossos maiores.’ Salazar on the First National Union Congress’ inaugural speech on 26<sup>th</sup> May 1934, collected in Salazar, António de Oliveira (1934), *Discursos. 1928-1934*, Coimbra, Coimbra Editora, p. 335. Emphasis added.

The relationship between nationalism and colonialism did not go unnoticed in historiography about the *Estado Novo*. While Portuguese colonial historiography showed no interest in this period until the 1990s, even the less comprehensive studies on *Estado Novo* revealed the centrality of the Empire for the establishment and consolidation of the new regime, as Valentim Alexandre accurately remarked.<sup>47</sup> These studies allude to two common assumptions that would be reproduced in the first approaches on colonial ideas disseminated in metropolitan culture, which were centred in official colonial ideology.<sup>48</sup> First of all, nationalist discourses predicated on Portugal's colonial status were essential for *Estado Novo*, being especially exacerbated during the first decades of the regime; second, official attempts were made to influence and manipulate the way the Portuguese perceived their empire and, subsequently, perceived Portugal's geopolitical status in order to foment collective pride and national and nationalist awareness. As such, they failed to go beyond what the most famous and widely disseminated image of Portuguese colonial propaganda of that period made evident at the first sight.

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<sup>47</sup> Alexandre, Valentim (1993), 'Ideologia, Economia e Política: a Questão Colonial na Implantação do Estado Novo', *Análise Social*, XXVIII (123-124), pp. 1117-1136

<sup>48</sup> Alexandre, Valentim (2000), *Velho Brasil, Novas Áfricas – Portugal e o Império (1808-1975)*, Oporto, Edições Afrontamento; Fortuna, Carlos (1987), 'O tempo e o modo de dominação colonial do Estado Novo' in *O Estado Novo. Das origens ao fim da autarcia, 1926- 1959*, Lisbon, Fragmentos, vol. II, pp. 81-88; Gomes, Ana Calapez (1989), 'Aspectos da ideologia colonial de Salazar na época das descolonizações. A questão colonial na identidade nacional portuguesa' in *Vértice*, II, 13, pp. 70-75; Ramos, L. F. Palma (1988), 'Estado Novo e discurso colonial – o exemplo de Armindo Monteiro', *Vértice*, II, 3, pp. 53-64; Rosas, Fernando (1995), 'Estado Novo, Império e Ideologia Imperial' in *Revista de História das Ideias*, 17, pp.19-32; Silva, A. E. Duarte (1989), 'Salazar e a Política colonial do Estado Novo: o Acto Colonial (1930-1951)' in AAVV, *Salazar e o Salazarismo*, Lisbon, Publicações Dom Quixote, pp. 101-152 Silva, Rui Ferreira (1992), 'Sob o signo do Império' in Fernando Rosas (coord.), *Portugal e o Estado Novo (1930-1960)*, vol. XII de Serrão, Joel e A.H. Oliveira Marques (dirs.) *Nova História de Portugal*, cap. VIII, pp. 355- 387; Wheeler, Douglas (1998), 'Aqui é Portugal!: The politics of the colonial idea during the Estado Novo, 1926-1974' in *Portugal na Transição do Milénio. Colóquio Internacional*, Lisbon, Fim de Século, pp. 375-405.

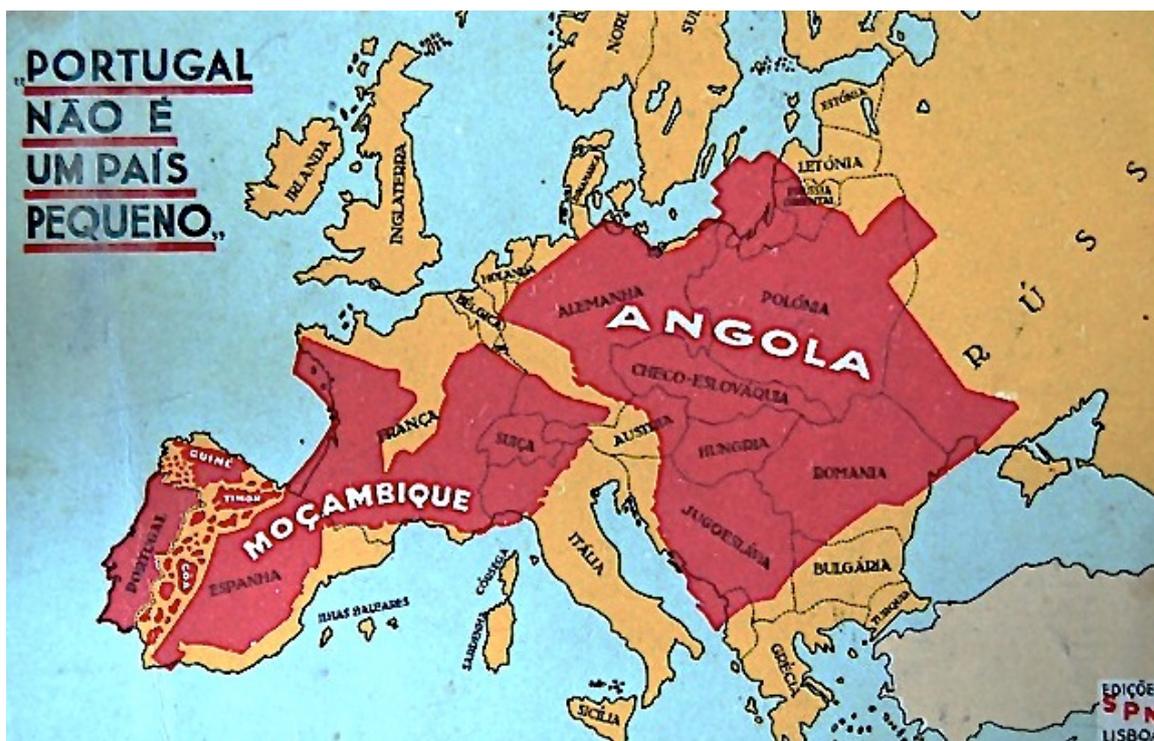


Figure 0.1. Postcard attesting Portugal’s dimension issued by *Sociedade de Propaganda Nacional*, which was *Estado Novo*’s government propaganda agency. (Private collection)

The postcard teamed up with a poster in which the overlap of the Portuguese colonies to the European continent is complemented with the indication of their areas, showing that all these territories together added up to an area larger than Spain, France, the United Kingdom (mislabelled as England, as customary in Portugal at the time), Italy, and Germany all together. By ignoring the distortion that results from map projection, the size of the Portuguese colonies in the picture is significantly inflated.<sup>49</sup>

Both the postcard and the poster are undated but they are likely from late 1934.<sup>50</sup>

<sup>49</sup> A non-distorted version can be seen in Marques, A. H. de Oliveira e João José Alves Dias (eds.) (2003), *Atlas Histórico de Portugal e do Ultramar Português*, Lisbon, Centro de Estudos Históricos, p. 577. On strategies to manipulate public perceptions with maps, see Monmonier, Mark (1996), *How to Lie with Maps*, Chicago, Chicago University Press.

<sup>50</sup> The picture is an adaptation of a similar map – though in green and gold – exhibited during the First Portuguese Colonial Exhibition, held in Oporto during the summer of 1934. Since Germany’s area remains exactly the same in this second version, it must have preceded Saarland’s reunification with Germany in early 1935, an event that did not go unnoticed in Portugal.

As a consequence of the ever asserted constitutive role of colonial ideology in national identity discourses during the first decades of the regime, this period has been dubbed the *Estado Novo's imperial mystique* phase. Its periodisation is variable: while some authors limited the imperial mystique phase to 1945 (i.e. until the end of the Second World War and the blow of wind of change for decolonisation), others extend it to 1951 (i.e. until the revocation of the aforementioned Colonial Act in which the 'organic essence' of the nation was defined).<sup>51</sup> The starting point is the same, though: 1930.

In truth, Salazar took office as prime minister, becoming the first civilian head of government since the 1926 coup d'état that had overthrown the First Republic's democratic regime, only in 1932. *Estado Novo* was officially proclaimed only in 1933, with the promulgation of the new Constitution. However, the early 1930 crisis that led to Salazar's abovementioned nomination as interim minister of Colonies was the turning point that clarified the future direction of the military dictatorship. Salazar provoked both the dismissal of the President of the Bank of Angola who publicly criticised his policies and the resignation of Prime Minister Ivens Ferraz, who was aligned with a more moderate faction of the regime. By bringing Ivens Ferraz's cabinet down with the support of the President of the Republic, General Óscar Carmona, Salazar reinforced his power within the government and became in actual control of Portugal's government. The necessary conditions to set about the new regime were gathered from 1930 onwards. *Estado Novo* was on the way.<sup>52</sup>

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<sup>51</sup> See, for instance, Ramos, L. F. Palma (1988), 'Estado Novo e discurso colonial – o exemplo de Armindo Monteiro', *Vértice*, II, 3, pp. 53-64; Alexandre, Valentim (1996), 'Ideologia Colonial' in Fernando Rosas and J. M. Brandão de Brito (eds), *Dicionário de História do Estado Novo*, Lisbon, Bertrand Editora, vol. I, pp. 432-434; Castelo, Cláudia (1998), '*O Modo Português de Estar no Mundo*'. *O luso-tropicalismo e a ideologia colonial portuguesa (1933-1961)*, Oporto, Edições Afrontamento; Léonard, Yves (1999), 'O Império Colonial Salazarista' in Francisco Bethencourt and Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, Lisbon, Círculo de Leitores, vol. 5, pp. 10-30.

<sup>52</sup> On the early 1930 crisis and its importance for the consolidation of Salazar's power, see for instance Rosas, Fernando (2013), 'Tomar o Poder' in Idem, *Salazar e o Poder. A arte de saber durar*, Lisbon, Tinta da China, ch. 2, pp. 47-182. See also Oliveira, César (1988), *Ascensão de Salazar: Memórias de Ivens Ferraz*, Lisbon, O Jornal; Wheeler, Douglas (1988), *A Ditadura Militar Portuguesa, 1926-1933*, Lisbon, Edições Europa-America; Pinto, António Costa (2003), 'Twentieth-Century Portugal: An Introduction' in Idem, Pinto, António Costa (2003) (ed.), *Contemporary Portugal. Politics, Society, and Culture*, New York, Columbia University Press, pp.

The reasons for choosing *Estado Novo* as the time frame for this study are twofold. First, my choice owes much to the nature of the regime established by Salazar. Like in other twentieth century dictatorships at the age of authoritarian nationalisms, state strengthened not only its despotic power but also its infrastructural power, to use Michael Mann's terms.<sup>53</sup> As state institutions were developed, apparatuses and daily practices to shape a specific Portuguese *homo nationalis* – to recall Balibar's aforementioned terminology – were unprecedented in Portugal. It is important to keep in mind that state power in civil society was very weak in the country prior to the implantation of *Estado Novo*. Moreover, *Estado Novo* operated a finely tuned colonial propaganda machine. At this point, it is important to clarify that this project is neither about propaganda nor about colonial ideology promoted by the propaganda apparatus.<sup>54</sup> However, the propaganda machine was not only a repressive mechanism but also a facilitator and promoter of discussion – albeit controlled – on the topics that were considered convenient.<sup>55</sup> In this sense, it also opened new channels of communication to

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1-45. See Meneses, Filipe Ribeiro (2010), *Salazar. A Political Biography*, New York, Enigma Books as well.

<sup>53</sup> Shortly, Michael Mann made a distinction between state power over a society and state power through the society, i.e. creating infrastructures (such as schools, a system of communication) that allows the state to permeate and control civil society in a more direct way to implement their decisions. Both powers are combined to different extents in different regimes. Whilst in democracy despotic power is weaker, authoritarian regimes intensify both their despotic and infrastructural power. Mann, Michael (1984), 'The Autonomous Power of the State: its Origins, Mechanisms, and Results' in *European Journal of Sociology / Archives Européennes de Sociologie*, 25 (2), pp. 185-213. Mann, Michael (1993), *The Sources of Social Power*, Cambridge, Cambridge University Press, vol. II, pp. 54-75.

<sup>54</sup> For such study, see Garcia, José Lima (2011), *Ideologia e Propaganda Colonial no Estado Novo: Da Agência geral das Colónias à Agência do Ultramar, 1924-1974*, Coimbra, Unpublished Doctoral Dissertation. On colonial propaganda in other European countries, see Schneider, William H. (1982), *An Empire for the Masses. The French Popular Image of Africa, 1870-1900*, Westport - London, Greenwood Press; MacKenzie, John M. (1984), *Propaganda and Empire. The Manipulation of British Public Opinion, 1880 - 1960*, Manchester - New York, Manchester University Press; August, Thomas G. (1985), *The Selling of the Empire. British and French Imperialist Propaganda, 1890 - 1940*, Westport - London, Greenwood Press; Lemaire, Sandrine (2000), *L'Agence économique des Colonies: instrument de propagande ou creuset de l'idéologie coloniale en France (1870-1960)?*, Florence, European University Institute (Unpublished Dissertation); Blanchard, Pascal e Sandrine Lemaire (2003) (dirs.), *Culture coloniale. La France conquise par son empire, 1871 - 1931*, Paris, Éditions Autrement; Blanchard, Pascal e Sandrine Lemaire (2004) (dirs.), *Culture impériale. Les colonies au cœur de la République, 1931- 1961*, Paris, Éditions Autrement.

<sup>55</sup> On *Estado Novo's* politics of culture, see Ramos do Ó, Jorge (1999), *Os anos de Ferro. O dispositivo cultural durante a 'Política do Espírito'. 1933-1949*, Lisbon, Editorial Estampa. See also the introductory chapter of Melo, Daniel (2001), *Salazarismo e Cultura Popular (1933-*

be explored by non-official media, making the empire more and more present in the public sphere. Remarkably, despite censorship, periodicals focused on colonial issues multiplied during the 1930s and 1940s, and so did the number of conferences, talks, and other events on imperial-related subjects.

The decision to focus on the first decades of *Estado Novo* only – the imperial mystique phase – was related to the need to limit my research scope. Since I am most interested in discourses that gained extensive circulation, periodicals and other published primary sources were central for my research. Considering the amount of available publications, it would have been impossible to cover the almost fifty years of the dictatorship without critically limiting the body of sources. However, by focusing on this time frame, my aim is not to reify the idea of *imperial mystique* as it is usually understood on Portuguese historiography, i.e. as an ideological discursive formation based on the nationalist exaltation of the empire promoted by colonial propaganda during the 1930s and 1940s and boosted mainly by Armindo Monteiro, minister of Colonies from 1931 to 1935.<sup>56</sup> Rather, I will seek to highlight the transformation of discourses within this period, revealing their inner contradictions and inconsistencies and contesting the idea of ‘imperial mystique’ as a well-defined block of myths, as well as pointing out the continuities with the previous political regimes.<sup>57</sup>

The second reason for choosing *Estado Novo* as the time frame for this study came from a puzzling observation: if the set of ideas and representations about the Empire were so central for national identity discourses in the 1930s and 1940s, why has

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1958), Lisbon, Imprensa de Ciências Sociais, pp.23-42; Paulo, Heloísa (1994), *Estado Novo e Propaganda em Portugal e no Brasil. O SPN/SNI e o DIP*, Coimbra, Minerva.

<sup>56</sup> In this sense, the *imperial mystique* was something that could be transmitted, which differs from what *imperial mystique* meant to *Estado Novo*'s contemporaries themselves. For them, imperial mystique was something the Portuguese were born with: notwithstanding it could be stimulated, it was an innate – though sometimes dormant – way of feeling or an attitude *affectively* based on devotion to the empire that all genuinely Portuguese men and women shared. See Azevedo, F. Alves de (1939), *A Mística Imperial*, Lisbon, Edições Cosmos.

<sup>57</sup> I am not original in stressing this continuity. See Léonard, Yves (1998), 'I. A ideia colonial, olhares cruzados (1890- 1930)' in Francisco Bethencourt and Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, Lisbon, Círculo de Leitores, vol. 4, pp. 521-535; Léonard, Yves (1998), 'II. A ideia colonial, olhares cruzados (1890- 1930)' in Francisco Bethencourt and Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, Lisbon, Círculo de Leitores, vol. 4, pp. 536-553; Paulo, João Carlos (2001), 'Cultura e ideologia colonial' in António. H. Oliveira Marques (ed.), *O império africano, 1890-1930*. Lisbon: Editorial Estampa, pp. 87-88. See also Jerónimo, Miguel Bandeira (2009), *Livros Brancos, Almas Negras. A "missão civilizadora" do colonialismo português, c. 1870-1930*, Lisbon, ICS, especially pp. 251-268.

it been only partially explored in studies of related themes, being a marginal topic in Portuguese historiography on *Estado Novo*? In his study on the colonial educational policies implemented by the Portuguese authorities from the 1926 military coup to 1946, João Carlos Paulo noted the increasing concern with the conciliation between the transmission of colonial knowledge and nationalist ideology.<sup>58</sup> Yet, he has not explored how the two were intersected beyond the myth-symbol complex of the *imperial mystique*.

Cláudia Castelo's pioneering study on the reception of Gilberto Freyre's lusotropicalism documented the extent in which Freyre's ideas on Portuguese colonisation and the character of the Portuguese people was disregarded in the 1930s and 1940s, being later appropriated by official rhetoric and becoming a cornerstone of representation of Portugueseness from the 1950s.<sup>59</sup> However, Castelo looks at the role of Empire in national identity discourses in a Manichean fashion, opposing the imperial mystique phase to the lusotropicalist phase; even though she acknowledges the transference of ideas from the former to the later, Castelo pays little attention to the evolution of ideas within each phase.

Anthropologist Luís Cunha briefly and superficially approached the idea of civilising vocation in representations of national identity during *Estado Novo*.<sup>60</sup> Patrícia Ferraz de Matos's analysis of racial representations produced in the Portuguese Colonial Empire during *Estado Novo* explored the official attempts to embed metropolitan culture with racial theories developed by colonial anthropology, which legitimised colonial domination and, consequently, national galvanisation.<sup>61</sup> Both Luís Cunha and Patrícia Ferraz de Matos bring to light important ideas on what it meant to be a Portuguese coloniser for the Portuguese at the time. However, they end up being

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<sup>58</sup> Paulo, João Carlos (1992), "A Honra da Bandeira". *A Educação Colonial no Sistema de Ensino Português (1926-1946)*, Lisbon, Faculdade de Ciências Sociais e Humanas – Universidade Nova de Lisboa (unpublished dissertation)

<sup>59</sup> Castelo, Cláudia (1998), «O Modo Português de Estar no Mundo». *O luso-tropicalismo e a ideologia colonial portuguesa (1933-1961)*, Oporto, Edições Afrontamento

<sup>60</sup> Cunha, Luís (2001), *A Nação nas Malhas da sua Identidade. O Estado Novo e a construção da identidade nacional*, Oporto, Edições Afrontamento, pp. 97-126.

<sup>61</sup> Matos, Patrícia Ferraz de (2006), *As Côres do Império. Representações Raciais no Império Colonial Português*, Lisbon, Imprensa de Ciências Sociais

captives of the *imperial mystique*: by taking the ideological discursive formation based on the nationalist exaltation of the empire promoted by colonial propaganda during the 1930s and 1940s (as outlined by the early historiographical approaches to colonialism during this period) for granted, Luís Cunha and Patrícia Ferraz de Matos do not go deeper in their approach to civilising vocation and racial theorisation as constitutive elements of Portugueseeness. As a consequence, my levels of skepticism regarding the value of the ‘imperial mystique’ as an analytic concept have increased.

In turn, Maria Isabel João explored the centennial commemorations of the Portuguese discoveries and expansion from 1880 to 1960, a topic that had already been lightly broached by Fernando Catroga.<sup>62</sup> Despite the vast chronological period involved and the many transformations in Portuguese society, Maria Isabel João successfully unveils a connection between the commemorations from the construction of the Third Empire to the beginning of the colonial war: she argues that the affirmation of an imperial-based nationalism increased since the end of the nineteenth century until reached its peak in the political and ideological presentation of the *Estado Novo*. Very informative about the organisation of those commemorations, the actors involved and their diverse activities, Maria Isabel João’s approach is limited to great events and officially organised ceremonies to celebrate the empire. My approach to the interconnectedness of empire and nation is informed by the central hypothesis that empire and nation were knitted together beyond celebratory events promoted by nationalist propaganda as the ones studied by Maria Isabel João. For that reason, I will not explore great events such as the colonial exhibitions or the 1940 Exhibition of the Portuguese World, even though they are obvious sites for the reaffirmation of Portugal as an imperial nation.

Lastly, two other doctoral dissertations have been entirely devoted to the study of association between empire and national identity during the first decades of the *Estado Novo* thus far. In his doctoral dissertation at the University of São Paulo, Brazil, Omar Ribeiro Thomaz Thomaz built his research around specific media that promoted imaginings of Empire, such as colonial literature, colonial exhibitions, and scientific

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<sup>62</sup> João, Maria Isabel (2002), *Memória e Império. Comemorações em Portugal (1880-1960)*, Lisbon, Fundação Calouste Gulbenkian – FCT; Catroga, Fernando (1998), ‘Ritualizações da História’ in Torgal, Luís *et al.* (eds.), *História da História em Portugal. Séc. XIX-XX*, vol. II, *Da historiografia à memória histórica*, Lisbon, Temas e Debates, ch. 5, pp. 221-364

congresses and conferences.<sup>63</sup> In his turn, Paulo Polanah organised his research around key themes that he identified as central to national identity discourses: the greatness of the Discoveries, the sanitisation of Portugal's involvement with slavery, the fear of loss of the empire and questions of race.<sup>64</sup> Both Omar Ribeiro Thomaz and Paulo Polanah have focused on the ideas and representations of Empire that were connected with narratives of national identity propagated at the time but have failed to analyse their findings in their wider context of production, paying little attention to the discourses in which they emerged.

In short, Omar Ribeiro Thomaz and Paulo Polanah extracted nationalist evidences of imperial discourses without being aware of what laid around them, neglecting the evolution of the Portuguese colonial project within a broader international context and how it affected the way the idea of empire and the set of virtues associated with Portuguese colonisation was instrumentalised in national identity narratives. By doing so, they missed why determined ideas of Portugueseness associated with the nation's status as a colonial power were evoked in a particular time and not in other. They missed also why different and sometimes contradictory ideas were articulated in a different time or by a different individual, conveying the idea that being a imperial nation and a Portuguese coloniser meant the same for everybody in Portugal during the 1930s and 1940s rather than being ambivalent and endlessly subject to renegotiation. To sum up, neither Thomaz nor Polanah captured the flexibility and complexity of national identity discourses because they focused their research on nationalist discourses on the nation but ignored imperial thinking.

It is by dislocating the focus from *Estado Novo's* nationalist discourses to the imperial thinking that took place at the time that this dissertation aims to add a new

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<sup>63</sup> Thomaz, Omar Ribeiro (2002), *Ecos do Atlântico Sul: representações sobre o terceiro império português*, Rio de Janeiro, Editora UFRJ. See also Thomaz, Omar Ribeiro (2001), 'O bom povo português: usos e costumes d'aquém e d'além mar', *Mana - Estudos de Antropologia Social*, 7 (1), pp. 55-88

<sup>64</sup> Polanah, Paulo (2004), *Exceptionalism and the Imperial Mystique: National and Colonial Discourse and the forging of a Portuguese Imperial identity, 1928-1945*, University of California - Santa Barbara (Unpublished doctoral dissertation). See also Polanah, Paulo (2008), 'An Imperial Mystique: Colonial discourse and National Identity in Portugal, 1930-1945', *Portuguese Studies Review*, 16 (1), pp. 61-86; Polanah, Paulo (2011), "'The Zenith of our National History!'" National Identity, Colonialism, and the Promotion of the Portuguese Discoveries: Portugal 1930', *e-Journal of Portuguese History*, Vol. 9 (1), pp. 39-62.

perspective to the existing historiography on its imperial-based nationalism, contributing for a better understanding of the complex relationship between empire and national identity in metropolitan Portugal.

Therefore, in order to implement my research agenda, the outlines of this study are intentionally broad. They open out from a point that is very specific, though: the *topos* of Portugueseeness pervaded the way the Portuguese thought the empire in the metropole and, therefore, it is to be found in the discussion of an array of imperial themes. These imperial themes work as case studies to capture different ideas that shaped and were shaped by national identity.

### **On Sources and Archives**

The selection of the imperial themes explored in this dissertation was not made *a priori*. Instead, I let the sources ‘talk’ for themselves in order to have a clearer idea of which topics were the most significant for the 1930s and 1940s Portuguese *in public debates*.

Therefore, the first stage of research began with the consultation of a wide range of periodicals on colonial issues, covering every issue published between 1930 and 1951. The selection included official publications, namely the colonial propaganda agency’s *Boletim da Agência Geral das Colónias* (which preceded *Estado Novo*, being published since 1925) and its *O Mundo Português* (target for a non-specialised public, 1934-1947). It included also journals from organisations devoted to colonial studies, namely *Anuário da Escola Superior Colonial* (from the Higher Colonial School), *Boletim da Sociedade de Geografia de Lisboa*, and missionary *Portugal em África* (from 1944 until 1951). Private-owned periodicals of colonial propaganda were not forgotten: even though they were submitted to both censorship control and editorial control and contributions were often manipulated or ‘corrected’ prior to publication, they give me access to a different range of voices. My selection included *Acção Colonial* (1930-1934), *Império Português* (1930-1934), *Portugal d’Aquem e d’além*

*mar* (1937-1951), *Portugal Colonial* (1931-1936), *Revista do Ultramar* (1948-1949), *Vida Colonial* (1935-1936), *Voz das Colónias* (1933-1936) and *Ultramar* (1941). Amongst the private-owned periodicals included in the selection at this first stage were also *Mocidade Africana* (1930-1931) and *Humanidade* (1935-1939), both run by African or race-mixed individuals living in the metropole, in an attempt to capture a different perspective. The focus of this dissertation is on the cultures of the colonisers, not on those of the colonised, though.

The results of this first analysis were then crossed with a limited number of cultural and nationalist periodicals in order to identify which themes strayed beyond publications that only a person interested in colonialism would read in the first place. Mostly monthly publications, they included both conservative publications, such as *Nação Portuguesa* (1930-1938) or *Alma Nacional* (1934-1951), and more progressive ones, such as *Seara Nova* (1930-1951) and *Vida Contemporânea* (1934-1936), to name a few.<sup>65</sup>

Only after the identification of the themes arisen from the sources, it was conducted research on each of them. Although contemporary published sources were the main focus since debates that the contemporaries brought for the public sphere are at the heart of this dissertation, they were complemented with archival research at *Arquivo Histórico Ultramarino*, Salazar's archive at the *Arquivo Nacional da Torre do Tombo*, *Arquivo Histórico-Diplomático*, *Arquivo Histórico Parlamentar*, and the *National Archives* in London in order to situate and better understand these debates. In addition, selected daily mainstream newspapers, both national and international, were consulted in brief and well-defined periods on occasions of relevance for each of the main topics.

At this point, it is important to clarify two aspects. First, this dissertation is not about any of the selected themes: they are examples selected for the assessment of the interplay of notions of empire and nation in the discourses of the contemporaries. Therefore, individual chapters deal with different themes but my approach to them is evidently far from resulting into a complete, exhaustive investigation of any of them.

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<sup>65</sup> The full list can obviously be found on the bibliographical references.

They are, I reiterate, seen as sites for the projection of ideas on Portuguese national identity.

Second, since the themes have arisen from the sources instead of the other way round, this dissertation is organised around what was said to be important by the contemporaries in public debates. For that reason, the choice of central themes reflects the importance that was assigned to these themes and how they were discussed at a given time rather than their actual importance for the Portuguese colonial project and the life of the nation. That explains why, for instance, the construction of racial differentiation between colonisers and colonised, which was so obviously central to colonial domination, is not one of the selected themes in this dissertation. Nevertheless, it crosses my analysis in every of the following chapters.

## **Chapters overview**

This dissertation comprises five non-chronological chapters.

The first two chapters explore moments of perceived international peril for the nation and the Portuguese empire, which were also privileged periods of national exaltation and national unity against the common foreign enemy. Chapter 1 is focused on one of the first international challenges faced after Salazar's power consolidation: the 1930 Forced Labour Convention of the International Labour Organisation. It roots the Portuguese reaction in a long discussion about the existence of forms of native forced labour in the Portuguese empire and aims to show how the trope of exceptionality of Portuguese colonialism played an important role in the rejection of foreign accusations.

In turn, Chapter 2 attempts to place Portugal in context of emergency of rumours of a second repartition for Africa on the eve of the Second World War. In this chapter, my analysis will be centred on the ways international threats stimulated the representation of Portugal as the European nation that was more deserving of colonies

than any other global power. It will explore a discourse on Portuguese historical unfair treatment in international colonial order and Portuguese moral superiority in a context of continuous global covetousness.

Chapter 3 turns inward. This chapter is centred on the discussion on national unity between metropolitan Portugal and its empire. It explores the debates on the conception of unity in the light of the designations given to the colonies – colonies or overseas provinces. It is aimed to address the multiple inconsistencies and contradictions in the rhetoric of Portugal as a multi-continental united nation.

The chapter that follows explores the debates on colonial migration and settlement. In chapter 4, I will attempt to show how this debate became central from the 1930s onwards. I will argue that different trends of thought about migration to the colonies and settlement were predicated on competing ideas about what the Portuguese empire should be, stressing the tension between modernity and tradition in the contemporaries' envisioning of a Greater Portugal.

Finally, chapter 5 will be focused on a well-ingrained trope that crosses the multiple debates on the empire and generations. In this chapter, I will contest the representation of the Portuguese as natural colonisers – different and innately better than any other. My approach will be based on the circulating myths that Portuguese colonialism was neither economically driven nor violent, exposing their pervasiveness and uncovering the argumentative line on which they were predicated.



# 1. INTERNATIONAL CAMPAIGNS AGAINST PORTUGAL: FORCED LABOUR, FALSE HUMANITARIANISM, AND THE LEAGUE OF NATIONS

On 5<sup>th</sup> September 1930 the Portuguese government issued a brief press release after a memorandum of the British Anti-Slavery and Aborigines Protection Society had raised doubts about the subsistence of a system of forced labour analogous to slavery in Portuguese West Africa.<sup>1</sup> In the memorandum, which was signed by Joseph Burt, William A. Cadbury, John H. Harris, and Henry W. Nevinson, it was claimed that Portuguese colonial authorities were not merely closing their eyes to incidents of forced labour in Angola; they were in fact supporting and encouraging the maintenance of such appalling form of labour.

At the origin of the memorandum was the report on economic conditions in Angola sent to the British Department of Overseas Trade by the British Consul General in Luanda, Robert Townsend Smallbones, in February 1929.<sup>2</sup> Despite being only a small part of the report, the section on labour conditions caused a stir. According to the signatories of the British Anti-Slavery and Aborigines Protection Society's

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<sup>1</sup> Consulted in *Diário de Notícias*, 5<sup>th</sup> September 1930, p. 1. The press release could be found in the front page of all daily newspapers at the time in accordance with the policy of control of the press that was in force at the time.

<sup>2</sup> Smallbones, Robert T. (1929), *Economic conditions in Angola (Portuguese West Africa) - Report*, London, His Majesty's Stationery Office

memorandum, Smallbones's report contained clear evidence of the intervention of the Portuguese colonial authorities in order to provide forced native labour for private profit.<sup>3</sup>

Robert Smallbones reported that the minimum wage payable to African labourers, which was fixed by the Portuguese authorities, was too low in comparison with the tax levied on them and the price of trade goods. The hut tax corresponded to the salary of four months at the minimum wage. Since Africans could obtain the necessary income to pay it and buy essential goods by selling their produce to traders, they lacked economic incentives to employ themselves at the service of European-owned estates. According to Smallbones, given that Angolans were not interested in working for the low salaries that they were being offered, governmental agents were using their authority to facilitate the supply of the necessary workforce to plantations. It was a win-win situation for both planters and administrators responsible for tax collection with disregard of the recruited workers' will. Since tax collectors in Angola were entitled to keep a percentage of the collected value as a compensation for the service – a value corresponding to 15% or up, as stated by Smallbones –, they had personal gains in facilitating the labour recruitment process themselves. Once Africans were employed, their taxes were deducted from their wages and paid directly by the employers to the government officials. For the signatories of the British Anti-Slavery and Aborigines Protection Society's memorandum, who transcribed the paragraphs of Smallbones's description on labour recruitment, there was no doubt: 'Thus is the yoke of slavery completed'.<sup>4</sup>

Additionally, the memorandum mentioned that witnesses had reported seeing 1172 Angolans entering two ships in direction to São Tomé and Príncipe's plantations in August 1929. The exactness of the number contrasted with the lack of further detail on the recruitment of these more than a thousand labourers: taking into account the preceding considerations, an image similar to the embark on slave trade ships could

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<sup>3</sup> The memorandum was later reprinted in the official periodical of the Anti-Slavery and Aborigines Protection Society in October 1930. Burt, Cadbury, Harris, and Nevinson (1930), 'Labour in Portuguese West Africa', *The Anti-Slavery Reporter and Aborigines' Friend*, 20 (3), pp. 111-113.

<sup>4</sup> *Idem*, pp. 112-113.

have come to mind of the readers of the memorandum. Making reference to Lord Cromer's seminal 1914 essay on the meaning of slavery, which laid down the principles defended by British diplomacy, it was emphasised that forced labour for private profit was no different from slavery.<sup>5</sup>

Meanwhile, the memorandum received wide publicity in the press in the United Kingdom and in the United States and provoked a chorus of protest in both Angola and Portugal. The timing of its publication, just a few months after the International Labour Organisation's Forced Labour Convention, could hardly have been more inconvenient for Portugal. The Portuguese government obviously denied the severe accusations. In the press release, it was assured that instructions had already been given to Angola's governor in order to appease the 'unreasonably excited' public opinion in the colony.<sup>6</sup> As predicted by the British Foreign Office, which had advised the Organising Secretary of British Anti-Slavery and Aborigines Protection Society's, John Harris, against the publication of the memorandum, Consul General Smallbones was blamed for the accusations as if he was the author of the memorandum and the promoter of its dissemination in the press.<sup>7</sup>

In Luanda, the Association of Commercial Employees, self-defined as proudly composed by 'Portuguese who are worthy of that name' and who 'feel the blows which the Fatherland receives as if they received them in their own faces', asked for Robert Smallbones's expulsion of the Angola in its *Bulletin*. The Association promoted a petition to that effect amongst its members – but open to everybody –, which could be signed in two commercial establishments in the city centre. Smallbones was accused of publicly disseminating unproven ignominies against the Portuguese nation 'on behalf of hidden interests pulled by fantastic strings'. He had, it was argued, made 'an insult to

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<sup>5</sup> Idem, p. 113. See also Evelyn Barin, Earl of Cromer (1914), 'What is slavery?' in *Political and Literary Essays, 2nd Series*, London, Macmillan, pp. 271-275

<sup>6</sup> *Diário de Notícias*, 5<sup>th</sup> September 1930, p. 1.

<sup>7</sup> See the Foreign Office's reply to John Harris inquest about the existence of objections to issuing the memorandum for publication in The National Archives (henceforth TNA), FO 371/15034/W11426/9695/36.

the Nation's honour' motivated by the desire to weaken Portugal's place in the international arena and undermine Portuguese role as a colonial power.<sup>8</sup>

Also driven by an extreme indignation, *Notícias de Benguela*, a weekly newspaper recently created to support commercial interests in Angola's second largest city at the time and its province, collected a set of written testimonies of foreign settlers. As non-members of the Portuguese national community, their national belonging was instrumentalised as a guarantee of their impartiality. From missionaries to farmers and chartered companies' administrators of different nationalities, their testimonies were similar: unlike the 'so-called humanitarians' speaking from London, none of the men who lived and worked in Angola had ever witness any episode of mistreatment of indigenous peoples in the colonies under the Portuguese administration and the accusations were groundless.<sup>9</sup> The opening testimony was from a British Army's major, H. de Laessoe, established in Bié, in the Central Plateau of Angola, as a farmer for seven years. Major de Laessoe maintained that forced labour was inexistent, any suspicion in this regard was competently investigated, and any attempted abuse was quickly punished. He also added that, in his opinion as a former Native Commissioner's Officer in Southern Rhodesia, the Portuguese government's conduct was sometimes ultra-benevolent with the natives, which was delaying African's progress in the colony. Protesting against 'the shocking statements' reproduced in the British press, the managers of Cassandola Estates and Angola Estates Ltd. (both companies owned by foreign capital, mainly British) stressed that, if there was any fault in the treatment of Africans in Angola, it was the fact that they 'were treated with too much consideration' by the Portuguese authorities.<sup>10</sup>

In the metropole, *Diário de Lisboa* interviewed the Minister of Colonies at the time, Brigadier Eduardo Marques, who deconstructed the accusations after an analysis of both the British Anti-Slavery and Aborigines Protection Society's memorandum and

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<sup>8</sup> *Boletim da Associação Beneficente dos Empregados do Comércio de Luanda*, 20<sup>th</sup> September 1930. A translation into English can be found in TNA/FO 371/15034/ W11426/9695/36, fols. 332-335.

<sup>9</sup> The colonial propaganda agency later reproduced them in its *Boletim*, amplifying their readership to a great extent. *Boletim Geral das Colónias*, 69 (March 1931), pp. 158-161

<sup>10</sup> *Idem*, p. 161.

Consul Smallbones's report.<sup>11</sup> The minister insisted that the minimum wage established by the Portuguese government was reasonable, claiming that many Africans spontaneously headed for the plantations or other agricultural and industrial enterprises to offer their work. This initiative confirmed that 'even the minimum wage is considered worthwhile by many natives who seek work for this payment without any kind of pressure'. Readers of the minister of Colonies' words would be convinced that, although in some parts of the colony Africans were not enough civilised to spontaneously seek work, even they would gladly accept a job at the wages defined by the Code of Indigenous Labour.<sup>12</sup> Moreover, according to the minister, the percentage received by the Portuguese officers who collected Africans' taxes was only about 5% and was in accordance with the official budget of the colony. On a final note, the minister of Colonies added that there was nothing objectionable about the transport of more than a thousand Africans from Angola to São Tomé and Príncipe since Portuguese authorities supervised the entire process and assured that everything was done freely and in fair conditions.

Yet, despite showing confidence in the lack of truth in the accusations of slavery made by the British Anti-Slavery and Aborigines Protection Society, the minister of Colonies showed little surprise at the controversy during the interview. Instead, Brigadier Eduardo Marques seemed to be expecting the materialisation of what was classified as a campaign against Portugal, raising doubts about its origin. The moment was critical for Portugal: the memorandum appeared in the press months after the

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<sup>11</sup> *Diário de Lisboa*, 16<sup>th</sup> September 1930, p. 1. The interview was praised by other mainstream newspapers and reprinted in *Boletim Geral das Colónias*, which also reported that the *União dos Interesses Económicos* [Union of Economic Interests], an influential association of patronage, translated the interview into English and French, distributing the leaflets by similar organisations across Europe. See *Boletim Geral das Colónias*, 64 (October 1930), pp. 142-144.

<sup>12</sup> In an international context of labour shortage in Africa as colonising countries intensified production demands and African colonies were vital for reconstructing metropolitan economies, Portuguese generosity had been rewarded. Abundance of indigenous labour in Angola was stressed in the official propaganda adverts in international press. By the time the memorandum was being discussed, the Colonial Propaganda Agency had bought a one eighth page ad in *The African World and Cape Cairo Express* in which Angola was adverted as 'the Land of Unlimited Scope for Settlers', offering 'unrivalled opportunities for farmers with either large or small capital' and, in bold letters, 'abundant native labour'. See, for instance, *The African World and Cape Cairo Express*, 30<sup>th</sup> August 1930, p. 232.

International Labour Organisation's Convention on forced labour. In his opinion, public opinion should keep in mind that the origin of the accusations was not trustworthy.

These three examples of Portuguese reactions against the British Anti-Slavery and Aborigines Protection Society's memorandum put the accent on the existence of an international campaign against Portugal and attacks to the 'honour of the nation' and stressed the ultra-benevolence or consideration of the Portuguese colonisers towards the natives when approaching the native labour problem, devaluing it in the public sphere. In the following, I will attempt to show how the International Labour Organisation's 1930 Convention on Forced Labour became a moment for the construction and affirmation of Portugal's exceptional colonialism – in the double sense of being unusual/unique and extremely good – around 1930.

To begin with, this chapter will situate the Portuguese reaction to the British Anti-Slavery and Aborigines Protection Society's memorandum controversy and Portugal's self-representation as a colonial nation in the international debate on forced labour and slavery at the International Labour Organisation's convention in its context by showing its long roots.

## **1.1. Slave Cocoa in São Tomé and Príncipe: a bitter imbroglio**

In spite of enjoying a great prestige in the English-speaking world, the British Anti-Slavery and Aborigines Protection Society was viewed with distrust in Portugal. The clash between the signatories of the 1930 memorandum and Portuguese colonialists was not a recent one. By the time the British Anti-Slavery and Aborigines Protection Society's memorandum was published, Joseph Burt, William A. Cadbury, John H. Harris, and Henry W. Nevins were all already well-known – and very well disliked – figures in Portugal and its colonies, especially in Angola and in São Tomé e Príncipe.

Joseph Burt, the first signatory of the British Anti-Slavery and Aborigines Protection Society's memorandum, had spent almost two years visiting Portugal's West

African colonies in order to observe labour conditions of natives working in cocoa plantations in São Tomé and Príncipe and the recruitment system in Angola, as well as the recruitment system of Mozambicans for Transvaal mines. The trip, which occurred between June 1905 and April 1907, was commissioned by William A. Cadbury on the behalf of Cadbury Brothers, the cocoa and chocolate market leader and one of the largest manufacturing companies in Britain at the time.

William Cadbury had first heard about the use of slave labour in São Tomé and Príncipe's cocoa plantations during a visit to Trinidad, in the West Indies, in 1901, after becoming the buying manager for the company. Shortly after, he came across a notice of sale of an agricultural estate in São Tomé, in which the Africans labourers were included along buildings, machinery, and cattle, which reinforced the idea that the existence of a labour system analogous to slavery in the Portuguese colony was not mere rumour.<sup>13</sup>

São Tomé and Príncipe was the source of about a half of the cocoa imported by Cadbury Brothers,<sup>14</sup> which posed a serious moral – and also commercial – problem to the company and to Cadbury family alike. Owned by a family with a strong Quaker ethos and active members of the Society of Friends, Cadbury Brothers Limited's brand image, as well as the family's social status amongst their religious peers, was connected to a reputation of philanthropy and to a public manifestation of hatred of every kind of

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<sup>13</sup> See Clarence-Smith, W. Gervase (1990) 'The hidden costs of labour on the cocoa plantations of São Tomé and Príncipe, 1875–1914', *Portuguese Studies*, 6, pp. 152–172, Clarence-Smith, W. Gervase (1993) 'Labour conditions in the plantations of São Tomé and Príncipe, 1875–1914', *Slavery and Abolition*, 14 (1), pp. 149–167. Satre, Lowell (2005), *Chocolate on Trial. Slavery, Politics and the Ethics of Business*, Athens: Ohio, Ohio University Press, p. 18. On the involvement of Cadbury family in the slave cocoa controversy, see also Grant, Kevin (2005), 'Calculating Virtue: Cadbury Brothers and Slavery in Portuguese West Africa, 1901-1913' in Idem, *A civilised savagery: Britain and the new slaveries in Africa, 1884-1926*, New York, Routledge, chapter 4, pp. 109-134; Jerónimo, Miguel Bandeira (2010), *Livros Brancos, Almas Negras. A 'missão civilizadora' do colonialismo português, c. 1870-1930*, Lisbon, ICS, pp. 89-109; Higgs, Catherine (2012), *Chocolate Islands. Cocoa, Slavery, and Colonial Africa*, Athens-Ohio, Ohio University Press; Robins, Jonathan (2012), 'Slave Cocoa and Red Rubber: E. D. Morel and the Problem of Ethical Consumption', *Comparative Studies in Society and History*, 54 (3), pp. 592-611. James Duffy's first approach to Portuguese labour policies in the colonies remains an important reference: Duffy, James (1967), *A Question of Slavery. Labour policies in Portuguese Africa and the British protest, 1850-1920*, Oxford, Clarendon Press.

<sup>14</sup> 45% or 55%, according to Lowell Satre and Catherine Higgs, respectively. Satre, Lowell (2005), *Chocolate on Trial. Slavery, Politics and the Ethics of Business*, Op. cit., p.19. Higgs, Catherine (2012), *Chocolate Islands. Cocoa, Slavery, and Colonial Africa*, Op. Cit. p. 9.

human exploitation.<sup>15</sup> William Cadbury himself and his uncle and director of the family's firm, George Cadbury, were associated with both the Anti-Slavery Society and the Aborigines' Protection Society, long before the two organisations were merged in June 1910.<sup>16</sup> Supporting a labour system that was virtually slavery was not compatible with their ethical concerns.

From 1901 to 1902, William Cadbury gathered information in Britain, intensifying contacts with Travers Buxton, secretary of the Anti-Slavery Society, and Fox Bourne, secretary of the Aborigines' Protection Society, who both brought to him diverse accounts on forced labour for private profit in the Portuguese colonies. Cadbury attempted to persuade other companies trading in cacao to pressure Portugal to reform the labour conditions in the colonies or to boycott São Tomé and Príncipe's production in 1903.<sup>17</sup> However, seeking to reconcile commercial interests with ethical concerns proved a difficult task. Despite the small dimension of the islands, São Tomé and Príncipe was the third most important cocoa producer in the world. New plantations of cacao tree take about ten years to fully produce commercial crops:<sup>18</sup> an immediate boycott would have left the companies without raw materials from an alternative origin. At the end, Cadbury only obtained the support of Fry and Sons and Rowntree & Company (both British chocolate makers of Quaker origin) and Gebrüder Stollwerck (Stollwerck Brothers, the German company where William Cadbury had made an eight-months internship before joining his family's company) but further information about the labour conditions of Africans was required. Since William Cadbury's recent visit to

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<sup>15</sup> On the way Quaker beliefs shaped the ethic of Cadbury Brothers, Ltd., see Dellheim, Charles (1987), 'The Creation of a Company Culture: Cadburys, 1861-1931', *American Historical Review*, 92 (1), pp. 13-14.

<sup>16</sup> Satre, Lowell (2005), *Chocolate on Trial. Slavery, Politics and the Ethics of Business*, Athens: Ohio, Ohio University Press, pp. 21-22. Grant, Kevin (2005), 'Calculating Virtue: Cadbury Brothers and Slavery in Portuguese West Africa, 1901-1913' in Idem, *A civilised savagery: Britain and the new slaveries in Africa, 1884-1926*, New York, Routledge, p. 110.

<sup>17</sup> According to a William Cadbury's letter send to Fry & Sons, a chocolate manufacturer from Bristol, also hold by Quaker family, mentioned in Robins, Jonathan (2012), 'Slave Cocoa and Red Rubber: E. D. Morel and the Problem of Ethical Consumption', *Comparative Studies in Society and History*, 54 (3), p. 600.

<sup>18</sup> Macedo, Marta (2012), 'Império de Cacau: ciência agrícola e regimes de trabalho em São Tomé no início do século XX' in Jerónimo, Miguel Bandeira (ed.), *O Império Colonial em Questão (Sécs. XIX-XX): Poderes, Saberes e Instituições*, Lisbon, Edições 70, p. 295.

Lisbon and the newly adopted regulations about labour recruitment in São Tomé and Príncipe adopted in Portugal<sup>19</sup> were not enough to appease the existing doubts, the search for a special envoy who could impartially observe labour conditions *in loco* began. Joseph Burt, who had recently turned down an offer to become the Anti-Slavery Society's assistant secretary, was suggested by Travers Buxton.

After studying the Portuguese language in Oporto for nine months, Joseph Burt began his tour in Portuguese Africa.<sup>20</sup> In São Tomé and Príncipe, where he spent five months and a half, Burt visited more than forty *roças* (agricultural estates). He observed that Africans generally looked well-fed and there was a concern in improving their accommodations and creating hospitals to assist them. Nevertheless, the wages were low and mortality rate amongst African labours was overly high. Also, physical punishment, notwithstanding being condemned by law, was still in use. Foremen made use of the paddle and whip, a situation that was difficult to report to the Curator for the Indigenous People because of the difficulty of reaching the city. Moreover, labourers made frequent attempts to escape the agricultural estates, which was an indicator that they were being forced and would rather prefer to return to Angola. According to Burt, the return never happened.<sup>21</sup>

In Angola, Joseph Burt reported multiple situations of slavery. According to Burt, selling and buying people as slaves was still a common practise amongst Africans and some Europeans also took advantage of the weak control of the Portuguese

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<sup>19</sup> New legislation regulating labour in São Tomé and Príncipe had been promulgated on 29<sup>th</sup> January 1903. It increased wages, the limited working hours and the duration of contracts to 5 years and introduced obligations regarding assistance. It also established a fund for the repatriation of Africans after the completion of their contracts, consisting of the retention of 3/5 of the wages and reverting to the labourer in case of contract renewal. The recruitment process was also regulated and the recruitment agent had to be licenced. See *Serviço da emigração de operários, serviços e trabalhadores para a província de S. Tomé e Príncipe: Decreto de 29 de Janeiro de 1903*, Lisbon, Imprensa Nacional.

<sup>20</sup> Making an exhaustive use of the regular correspondence between Joseph Burt and William Cadbury, Catherine Higgs provides a very complete reconstruction of Burt's journey and the evolution of his perception of labour in a colonial context. Higgs, Catherine (2012), *Chocolate Islands. Cocoa, Slavery, and Colonial Africa*, Athens-Ohio, Ohio University Press.

<sup>21</sup> Burt's report was included in Cadbury, William A. (1910), *Os Serviços de S. Thomé*, Oporto, Typographia Mendonça, pp. 83-104. The original version, in English, had been published on the year before. Burt, Joseph (1910[1909]), 'Report - On the Conditions of Coloured Labour on the Cocoa Plantations of S. Thomé and Príncipe, and the methods of procuring it in Angola' in William Cadbury, *Labour in Portuguese West Africa*, London, Routledge (2<sup>nd</sup> edition).

authorities. Burt was also convinced that the number of Angolans sent to São Tomé and Príncipe could be much higher than what was known because the bays in Angolan coast were poorly guarded. Together with W. Claude Horton, a British medicine doctor, Burt initiated a five-months trip from Benguela to Angola's eastern border in order to explore the commercial route also traversed by the workforce recruited for São Tomé and Príncipe's cocoa plantations. The reported sight of abandoned shackles, human skeletons, and a corpse composed a grim picture of a modern slave route. Burt was convinced that, unlike Mozambican workers in the Transvaal's mines, who were 'free and happy' to go the British colony and return to their home country, Angolans were recruited by force and 'in circumstances of great cruelty'. He concluded: 'If this is not slavery, I know of no word in the English language which correctly characterizes it.'<sup>22</sup>

Joseph Burt returned to São Tomé and Príncipe and Angola in 1908, acting as a translator to William A. Cadbury. This trip, which was much shorter, revealed that the situation remained virtually unchanged. By the time William Cadbury and Burt returned to the United Kingdom, new and improved legislation regulating labour in São Tomé and Príncipe had already been approved.<sup>23</sup> However, for Cadbury, the problem was not on the Portuguese legislation in itself: although he maintained that current repatriation laws did not facilitate the return to Angola, the major setback was that colonial authorities did not ensure compliance with the law.<sup>24</sup> As a consequence, Cadbury Brothers, Fry and Sons, Rowntree & Company, and Gebrüder Stollwerck refused to buy cocoa from the São Tomé and Príncipe. The boycott lasted until 1916, when the British consul in Luanda reported that the reforms since 1908 had finally produced results of 'such a magnitude that it is not an exaggeration to say that they constitute a revolution.'<sup>25</sup>

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<sup>22</sup> Burt, Joseph (1910[1909]), 'Report - On the Conditions of Coloured Labour on the Cocoa Plantations of S. Thomé and Príncipe, and the methods of procuring it in Angola', op cit., p. 131.

<sup>23</sup> Serviço da emigração de operários, serviços e trabalhadores para a província de S. Tomé e Príncipe: Decreto de 31 de Dezembro de 1908, Lisbon, Imprensa Nacional

<sup>24</sup> Cadbury, William A. (1910), *Os Serviços de S. Thomé*, Oporto, Typographia Mendonça, p. 73, p. 69.

<sup>25</sup> The report was translated to Portuguese in the following year. Hall, H. Hall (1917), Relatório oficial do Consul Geral Britânico em Loanda tratando das condições da mão d'obra em S.

Cadbury's and Burt's reports became an important piece for the British Anti-Slavery and Aborigines' Protection Society's campaign against the mistreatment of natives and precarious labour conditions in Portuguese colonies. The interest dated back 1900 but gained momentum after the amalgamation of the British Anti-Slavery Society and Aborigines' Protection Society. The man behind the new and more aggressive campaigns of the Society was the energetic Reverend John H. Harris, the third signatory of the 1930 memorandum. John H. Harris was a former Baptist missionary in the Congo Free-State and, together with his wife, Alice, an important voice against labour conditions in the territory.<sup>26</sup> After seven years in the Congo-Balolo Mission, John and Alice Harris returned to Britain and intensified their involvement with the Congo Reform Association – which also counted with William Cadbury amongst its sponsors – until the annexation of Congo by the Belgian state in 1908. After the campaign against Congo's blood-stained 'Red Rubber' – to use the expression popularised by E.D. Morel –, São Tomé and Príncipe's 'Slave Cocoa' grew to be a central concern of John Harris. The portrait outlined in *Portuguese Slavery: Britain's Dilemma*, which was written after Harris's visit to São Tomé in 1912, depicted a gloomier reality than Burt's and Cadbury's one.<sup>27</sup> Furthermore, unlike Cadbury, who initially attempted to keep the situation out of the public eye and preferred the contact with the Foreign Office, John Harris cultivated a closer relationship with the press. For instance, a letter sent by John Harris from São Tomé and Príncipe was explored in an article in *The Spectator*, one of the most influential London's weekly magazine: the idea that labourers, despite recruited in cruel conditions, were well treated upon the islands was contested; instead, it was stressed that their actual condition was akin to slavery, being characterised by 'all

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Tomé e Príncipe e do engajamento e repatriação dos trabalhadores indígenas, Lisbon, Tipografia do Anuário Commercial, p. 1

<sup>26</sup> Alice Harris's shocking photographs, which sometimes are attributed to her husband, were widely circulated to illustrate and strengthen publications and lectures during the Congo reform campaign in Britain. See Grant, Kevin (2001), 'Christian critics of empire: Missionaries, lantern lectures, and the Congo reform campaign in Britain', *Journal of Imperial and Commonwealth History*, 29(2), pp. 27-58. Thompson, T. Jack (2002), 'Light on the dark continent: The photography of Alice Seely Harris and the Congo atrocities of the early twentieth century', *International Bulletin of Missionary Research*, 26(4), pp. 146-149; Sliwinski, Sharon (2006), 'The childhood of human rights: The Kodak on the Congo', *Journal of Visual Culture*, 5(3), pp. 333-363.

<sup>27</sup> Harris, John (1913), *Portuguese Slavery: Britain's Dilemma*, London, Methuen

the horrors that go with predial slavery – imprisonments, floggings, the separation of husbands and wives, of parents and children, misery, shame and cruelty’.<sup>28</sup>

Yet, despite Cadbury’s discretion, the controversy of São Tomé and Príncipe’s slave cocoa had been in the agenda of press in Britain and the United States since 1905. In fact, Cadbury Brothers had been overtly accused of indirectly supporting slavery in West Africa in the in the pages of the *Standard*, a Londoner conservative newspaper. The accusations, which resulted in a process for libel, were primarily drawn on the work of Henry Nevinson, the last signatory of the 1930 British Anti-Slavery Society and Aborigines’ Protection Society.<sup>29</sup> Henry Nevinson, who John Harris would latter classify as a ‘prince of journalists, that twentieth century knight-errant’ due to his efforts to expose slavery, had visited Portuguese Africa supported by *Harper’s Monthly Magazine* in late 1904 and 1905.<sup>30</sup> Nevinson’s adventures and shocking discoveries regarding the treatment of native population in Angola and São Tomé and Príncipe first appeared in Harper’s in August 1905, i.e. a couple of months after Joseph Burt had began his tour on the behalf of Cadbury Brothers.<sup>31</sup>

Henry Nevinson started his tour in Angola, visiting the same towns and making the same expedition to Angola’s interior that Joseph Burt would make a year later. Only after Angola he visited São Tomé and Príncipe, where he met Joseph Burt. The findings of the two men did not diverge in their essence but the way they expose them was significantly different. Besides the prose style, the most significant difference was

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<sup>28</sup> *The Spectator*, 23<sup>rd</sup> March 1912, p. 465. Quoted in Stone, Glyn (2009), ‘The Foreign Office and Forced Labour in Portuguese West Africa, 1894-1914’, in Keith Hamilton and Patrick Salmon (eds.), *Slavery, Diplomacy and Empire. Britain and the Suppression of the Slave Trade, 1807-1975*, Brighton, Sussex Academic Press, chap. 8, p. 180.

<sup>29</sup> Details on Cadbury’s process for libel can be found in Satre, Lowell (2005), *Chocolate on Trial. Slavery, Politics and the Ethics of Business*, Athens: Ohio, Ohio University Press, ch. 8.

<sup>30</sup> Harris, John (1913), *Portuguese Slavery: Britain’s Dilemma*, London, Methuen, p. 23. For an historical biography of Henry Nevinson, see John, Angela (2006), *War, Journalism, and the Shaping of the Twentieth Century: the life and times of Henry W. Nevinson*, London – New York, I.B.Tauris.

<sup>31</sup> See *Harper’s Monthly Magazine* from August 1905 to February 1906. The articles were later collected and expanded in an impressive and very acclaimed book. Nevinson, Henry (1906), *A Modern Slavery*, London - New York, Harper & Brothers. On Nevinson’s *A Modern Slavery* see also Burroughs, Roberts (2011), *Travel writing and atrocities: eyewitness accounts of colonialism in the Congo, Angola, and the Putumayo*, New York, Routledge, chapter 4, pp. 98-121

in the terminology used in itself: although, as aforementioned, Burt concluded that the system of labour in use was no different from slavery, he referred to the workers in São Tomé and Príncipe by *serviçaes* (the Portuguese word in use at the time that meant ‘contracted labourers’); on the contrary, Nevinson profusely used expressions such as ‘slave’ and ‘slavery’,<sup>32</sup> never forgetting the inverted commons when writing ‘contract labourer’, ‘contracted laboured’ or any of the corresponding Portuguese expressions. He argued that the labour system in use was ‘only a dodge to delude the antislavery people’. In his sharp and sensational style, which much displeased William Cadbury, he compared the free will of an Angolan going to São Tomé and Príncipe to the ‘free will of a sheep going to the butcher’s’.<sup>33</sup>

Nevinson continued involved in the campaign against ‘slave cocoa’ after his return to the United Kingdom. In late 1910, he joined Joseph Burt and John Harris as part of a delegation to Lisbon of the Anti-Slavery and Aborigines’ Protection Society. The Society had been approached by the new Republican government, which aimed to appease public opinion on the question of colonial labour while obtaining international recognition in order to facilitate its legitimacy in a Europe still dominated by monarchic regimes.<sup>34</sup> Together with members of the Portuguese Anti-Slavery Society, which included Alfredo da Silva, a personal friend of William Cadbury, they met the new minister of Foreign Affairs. During the meeting, they obtained a verbal compromise to change labour recruitment policies and repatriate Angolan labourers who had been forcibly displaced to São Tomé and Príncipe. However, subsequent visits to Angola and São Tomé and Príncipe revealed that the situation persisted. The slow pace of reforms in Portugal raised doubts about the ability of the Portuguese to govern their colonies. Portugal was not effectively rescuing Africans from barbarism. Tolerate slavery – or

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<sup>32</sup> He even openly referred to the commercial route to Angola’s interior as ‘the main slave route’. *Harper’s Montly Magazine*, Nov. 1905, p. 849.

<sup>33</sup> *Harper’s Montly Magazine*, October 1905, p. 677; p. 670. On Cadbury’s concerns about the negative effects of Nevinson’s articles in his own campaign against forced labour in the Portuguese cocoa plantations, see Higgs, Catherine (2012), *Chocolate Islands. Cocoa, Slavery, and Colonial Africa*, Athens-Ohio, Ohio University Press, p. 23, p. 55.

<sup>34</sup> See Teixeira, Nuno Severiano (2002), ‘Política Externa da 1ª República, 1910 a 1926’ in Nuno Severiano Teixeira e António Costa Pinto, (eds) *A Primeira República Portuguesa – Entre o Liberalismo e o Autoritarismo*, Lisbon, Edições Colibri, pp. 169-177.

forms of forced labour comparable to slavery – was not only unacceptable on economic and moral grounds but was also contrary to the mission of colonisers.

The question of African labourers in Portuguese colonies became increasingly politicised. Pressed by the British and Foreign Anti-Slavery Society, Cadbury Brothers, and also by public opinion, which had been aroused by the multiplication of accounts regarding the labour abuses associated with cacao production in São Tomé and Príncipe, the British Foreign Office exercised diplomatic pressure on the Portuguese government. As Edward Grey, Foreign Secretary in office, confessed to the Francis Villiers, the British minister in Lisbon, the agitation around the ‘Slave cocoa’ controversy was ‘embarrassing both to His Majesty’s Government and the Portuguese Government’.<sup>35</sup> As a consequence of the intensification of the campaign for the reform of the labour system in São Tomé and Príncipe and the accusations of governmental inertia both in the press and in the parliament, the British government initiated the publication of White Papers on the Contract Labour in Portuguese West Africa assembling the diplomatic correspondence exchanged on the topic, as well as legislation and reports, which was first laid before the House of Commons in August 1912.

The Portuguese government also felt obliged to get involved in the debate that was taking place in the United Kingdom, using informal channels as the press to appease public opinion abroad. Speaking to Reuters during a visit to London for a meeting with the British Colonial Office in late July 1911, Alfredo Augusto Freire de Andrade, who was the Director-General of the Portuguese Colonial Office at the time,<sup>36</sup> seized the opportunity to claim that much of the foreign criticism directed against the labour conditions in Portuguese East Africa was ‘ill-informed’. Despite recognising that some mistakes could have taken place in the past, he assured that the new Republican government had ‘made a clean sweep of the old culpable officials and possesses in the

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<sup>35</sup> Edward Grey to Francis Villiers on 17<sup>th</sup> October 1907. Quoted in Stone, Glyn (2009), ‘The Foreign Office and Forced Labour in Portuguese West Africa, 1894-1914’, in Keith Hamilton and Patrick Salmon (eds.), *Slavery, Diplomacy and Empire. Britain and the Suppression of the Slave Trade, 1807-1975*, Brighton, Sussex Academic Press, chap. 8, p. 173.

<sup>36</sup> There was not an autonomous ministry of the Colonies in the Republican provisional government after the overthrow of the constitutional monarchy before 23<sup>rd</sup> August 1911. In practice, Freire de Andrade was in charge of the Colonies’ portfolio since, which might explain why the newspaper *The Scotsman* refers to him as Minister. *The Scotsman*, 31<sup>st</sup> July 1911. Transcribed in Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians: The case for S. Thomé*, Lisbon, Redação da Reforma, pp. 84-85.

new labour law an admirable check against abuses in recruiting'.<sup>37</sup> He was referring to the new Native Labour Code (*Regulamento Geral do trabalho dos indígenas nas Colónias Portuguesas*) enacted about two months earlier, on 27<sup>th</sup> May. Labour contracts had been limited to a maximum of two years, though a remark stating that this measure was temporary and that duration could be increased was made. The violent treatment, any form of incarceration (not only through the use of chains and shackles but also through any other mean that affected African labourers' freedom of movement) and the deprivation of food and deduction of the fines from their wages as forms of punishment were repudiated. In addition to these prohibitions, the obligations of the employer regarding labourers' assistance were reinforced.<sup>38</sup>

In reality, the new Native Labour Code had little effect in combating abuses. As the campaign against the so-called modern Portuguese slavery grew, so did the Portuguese attempt to use the British Press as a mean to clarify public opinion. The general director of the Colonies was not alone in his crusade against defamation inside the Portuguese Colonial Office.<sup>39</sup> One year after Freire de Andrade's statements to Reuters, the First Secretary in the Portuguese Colonial Office, José de Almada, sent a letter to *The Times*. Almada aimed to correct the 'misstatements' regarding labour in São Tomé and Príncipe that 'are spread all over England', making himself available to personally provide any further information to interested *The Times*' readers.<sup>40</sup> José de Almada made a vigorous defence of the Portuguese labour system in the islands, providing statistical data about mortality and praising the conditions offered to the labourers and their families. For José de Almada, offering such conditions was fundamental to facilitate the fixation of Angolans to São Tomé and Príncipe: in his opinion, 'to induce immigrant to settle in countries where the population is so sparse is a condition of prosperity and must be encouraged.' Nevertheless, labourers were

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<sup>37</sup> Transcribed in Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians: The case for S. Thomé*, Lisbon, Redação da Reforma, pp. 84-85.

<sup>38</sup> Decree of 27<sup>th</sup> May 1911, *Diário do Governo*, 29<sup>th</sup> May 1911, p. 2285 and ff.

<sup>39</sup> He gave an account about his efforts in the report on John Harris' Portuguese Slavery. See Andrade, Augusto Freire de (1913), *Relatório Feito pelo director-Geral das Colónias acerca do Livro Portuguese Slavery Escrito pelo Sr. John H. Harris*, Lisbon, Imprensa Nacional.

<sup>40</sup> *The Times*, 2<sup>nd</sup> July 1912, p. 5.

completely free to return home and, in fact, the ‘perfectly well-organized repatriation fund’ prevented them of spending their entire wages and going back without savings, i.e. regressing to their initial backward stage.<sup>41</sup> His defence of the Portuguese method was later developed in a comparative essay on indentured labour.<sup>42</sup> The author argued that, in dealing with indentured labour, Portuguese and British methods were very similar. Therefore, the accusations of slavery made against Portugal were not reasonable.

The essay was translated into English and distributed in the Portuguese embassy in London. It was highly appreciated in Portugal. By suggestion of the Portuguese ambassador in London, Manuel Teixeira Gomes, José de Almada received a commendation from the Portuguese Foreign Affairs Minister for his service in defence of national interest and he later became consultant of the Ministry of Foreign Affairs for colonial issues.<sup>43</sup> In contrast, the essay was much criticised in Britain. In fact, Lord Cromer’s aforementioned essay, ‘What is slavery?’, had first been published in *The Spectator*, in 17<sup>th</sup> January 1914, as a response to Almada’s text. For Lord Cromer, the British and the Portuguese systems diverged in a fundamental aspect: it was matter of moral or humanitarian principle, since in the former any form of coercive labour for private profit was condemned. On the publication of Cromer’s article, José de Almada promptly wrote to *The Spectator* to explain that compulsory labour for private profit did not exist in Portuguese colonies either.<sup>44</sup> However, the public perception of the Portuguese regulations regarding native labour had already been badly dented.

In the meantime, the discontentment of the owners of São Tomé and Príncipe’s plantations had grown. Amongst them, Francisco Mantero was the most notable voice. Mantero, whose agricultural estates in São Tomé and Príncipe had impressed Joseph Burt during his stay, was one of the major entrepreneurs in the Portuguese empire,

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<sup>41</sup> Ibidem.

<sup>42</sup> Almada, José de (1913), *Comparative essay on indentured labour at St. Thomé and Principe*, Lisbon, National Printing Office.

<sup>43</sup> See letter from José de Almada to Manuel Teixeira Gomes, 26<sup>th</sup> January 1914, Fundação Mário Soares, DTE – Documentos Teixeira Gomes/Correspondência/08081.118.

<sup>44</sup> Evelyn Baring, Earl of Cromer (1914), ‘What is slavery?’ in *Political and Literary Essays, 2nd Series*, London, Macmillan, pp. 271-275.

having agricultural estates also in Mozambique and Angola and being involved in copper mines in Angola. Feeling that his economic empire was under threat, he replied to the accusations about the use of forced labour in São Tomé and Príncipe, he wrote a 200-pages book on the subject in 1910 and made it published in Portuguese, English, French, and Castilian.<sup>45</sup> On the following year, he summarised his line of reasoning in a public speech in Lisbon on 13<sup>th</sup> February. Mantero presented an idyllic picture of Africans' labour conditions in São Tomé and Príncipe. Higher wages than the ones in force in Angola, a 'maternity leave' (which consisted in a month before and a month after giving birth without losing the correspondent wage), medical assistance, three meals per day, free clothing, and access to an asylum in old age or incapacity were amongst the multiple benefits of being recruited in Angola to join the plantations' workforce.<sup>46</sup> With these conditions, Mantero wondered about the reasons that led humanitarian Englishmen to insist on repatriation of Angolans, compelling them 'to return to the country from which he [the native] was rescued out of slavery'.<sup>47</sup> Furthermore, Mantero invited his audience to reflect on the motives why the British humanitarians were spending so much time, money, and energy in a campaign against São Tomé and Príncipe's plantations while keeping silence about similar systems of contracted labour happening in their own territory.<sup>48</sup> For Mantero, the reasons were twofold: on the one hand, there was the interest of cocoa producers in British colonies, who would greatly profit from the increase of the cost of production in Portuguese colonies;<sup>49</sup> on the other hand, there was an concerted attempt to 'discredit us [the Portuguese] in the eyes of the civilised world' by representing the Portuguese as 'engaged in, or conniving at, the criminal traffic of slavery' in order to 'isolate us as

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<sup>45</sup> Mantero, Francisco (1910), *A mão de obra em São Tomé e Príncipe*, Lisbon, Author's edition. The English title was *Manual Labour in S. Thomé and Principe*.

<sup>46</sup> Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians: The case for S. Thomé*, Lisbon, Redação da Reforma, p. 17.

<sup>47</sup> Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians*, op. cit., p. 20.

<sup>48</sup> Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians*, op. cit., pp. 22-23.

<sup>49</sup> Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians*, op. cit., p. 25.

morally infected'.<sup>50</sup> In other words, the Portuguese were inappropriate for colonisation on ethical grounds.

Mantero's conviction of the existence of a complot to vilify Portugal was generalised. For instance, the reception of John Harris's *Portuguese Slavery: Britain's Dilemma* reflected this attitude. Taking advantage of the presence of the Minister of Colonies at the Parliament for discussing affairs regarding the railway construction in Africa, the parliamentarian Lopes da Silva brought the book into discussion. He shared his own translations of some excerpts of the 'outrage that the detractors of the Portuguese colonial work' were 'vomiting' in Britain in order to corrupt public opinion against Portugal.<sup>51</sup> In this way, Lopes da Silva was able to gather the unanimous disapproval of the accusation, overcoming the excessive party fragmentation characteristic of the First Republic's parliaments. The real motives behind the British defenders of indigenous peoples were being questioned in Portugal at the time. Cadbury Brothers own economic interests in cocoa bean trade were outlined: by refusing to buy cocoa from São Tomé and Príncipe's plantations in 1909, Cadbury Brothers were manipulating the market and favouring the cocoa plantations in the British colony of Ghana. At the same time, rumours that William Cadbury was helping Portuguese royalists living in England in their struggle against the new republican regime were launched.<sup>52</sup>

Were the humanitarians really friends of the 'native races' – to use early twentieth century parlance – or just enemies of Portugal? Were race and labour conditions at the centre of their concerns or were they agents in the service of their nation's expansionist interests at the expense of a less powerful nation? Were the accusations against Portuguese colonial administration spurred by envy at Portugal's overseas possessions and Portugal's success as the oldest colonial empire? In Portugal, the answer to these questions seemed obvious: humanitarians had hidden interests. In fact, even for the Foreign Office in Britain it was unclear whether it was a pure

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<sup>50</sup> Mantero, Francisco (1911), *Portuguese Planters and British Humanitarians*, op. cit., p. 52.

<sup>51</sup> *Diário da Câmara dos Deputados*, 3<sup>rd</sup> June 1913, p. 4.

<sup>52</sup> See Satre, Lowell (2005), *Chocolate on Trial. Slavery, Politics and the Ethics of Business*, Athens-Ohio, Ohio University Press, p. 202.

humanitarian interest in the question of forced labour or Germany was behind the antislavery campaigns in Britain, manipulating humanitarian organisations for its own advantage.<sup>53</sup> In Portugal, the distrust toward the British and their humanitarian causes, understood as mere anti-Portuguese actions in disguise, continued to grow.

## **1.2. Portugal and the League of Nations: Conceptions of Slavery and Forced Labour between Lisbon and Geneva**

By 1930, the idea that humanitarianism could be used against Portugal for political purposes and that conspiracies to deprive Portugal of its colonies were being hatched by other colonial powers was again in full swing. The world order had significantly changed since the last humanitarian campaigns and rumours about international pacts involving Portuguese colonies before the First World War.

Despite being in negotiations to expand its colonial empire prior to the conflict, Germany had been dispossessed of its colonies in the meantime. As Reverend John H. Harris observed, Germany was widely perceived as the ‘Progressive Power’, emerging as a possible beneficiary of the Portuguese colonies or Belgian Congo in case of rearrangement of the partition of Africa at the eyes of international public opinion on the eve of the conflict.<sup>54</sup> Although Suzanne Miers argues that the secretary of the Anti-Slavery and Aborigines Protection Society was pro-German himself, advocating for the attribution of Portuguese colonies to Germany,<sup>55</sup> in *Dawn in Darkest Africa*, John H. Harris explicitly expressed his doubts about the subject. Harris questioned whether

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<sup>53</sup> See Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira, p. 57, footnote 21.

<sup>54</sup> Harris, John H. (1912), *Dawn in Darkest Africa*, London, Smith, Elder & Co., Part V, pp. 293-304. Fears of a new partition of Africa are the subject of chapter 2.

<sup>55</sup> Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira p. 51.

Africans would be better treated under Germany than under Portuguese, drawing attention to the treatment of the Herrero and the shooting of British Kaffirs to justify his doubts. In his opinion, the 'Portuguese have a kindly nature to which one can appeal', Germany 'has no philanthropic soul for the well-being of native races'.<sup>56</sup> Though minority before the First World War, a view on Germany as a colonising power to similar Harris's one triumphed after the conflict. Germany had now been considered unsuitable to be a coloniser/civiliser, lacking the appropriate moral basis inherent in international law. In short, it became evident that codifications about being a good or bad coloniser were not fixed, being defined and redefined in the international sphere.

To be sure, European imperialism cannot be understood as a set of national colonial projects entirely independent from each other even before the First World War. Good and bad colonial practices were discussed internationally and experiences were shared, informing the paths of different colonial experiences either by imitation or by opposition. The existence of international learned societies such as the *Institut colonial international*, created in Brussels in 1894 to promote the collaboration of European colonial intelligentsia, exemplify the cooperation between competing nations. The circulation of colonial expertise was, in fact, trans-imperial. Moreover, as the interest for colonial expansion increased and different national colonial projects clashed and the guiding principles of the Concert of Europe were extended to the African context, diplomacy between states did not mould territorial boundaries alone but also colonisation procedures.

The Conference of Berlin in 1884-1885 had established uniform rules to be applied and respected by the European powers. These rules dealt not only with free navigation, free commerce, and territorial occupation, but also – notwithstanding in a minor extent – with principles of good administration of the colonised people. The commitment with the suppression of slavery and slave trade and with 'the conservation of native races and the amelioration of their moral and material conditions of existence', favouring institutions engaged in making 'them understand and appreciate the advantages of civilisation' was part of the provisions of the General Act of the Berlin

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<sup>56</sup> Harris, John H. (1912), *Dawn in Darkest Africa*, op. cit., pp. 295-296.

Conference.<sup>57</sup> The idea of imperial trusteeship that would later be systematised by the League of Nations has a longer history, with roots in older humanitarian traditions of anti-slavery.<sup>58</sup> There was a set of moral obligations in the treatment of the colonised which had been crystallised by international law and was associated with the ‘standard of civilisation’ – to use Gerrit W. Gong’s expression – to which the coloniser had to conform.<sup>59</sup> The failure to comply with the standard would make a nation previously classified as civilised to be seen as less civilised. Francisco Mantero’s aforementioned concern about being considered ‘morally infected’ at the ‘eyes of the civilised world’ due to the association with slavery and slave trade demonstrates how this view was deep-rooted and acknowledged in colonialists’ minds before the First World War. In that sense, there was not a rupture with the essence of code of expected civilised behaviour between before and after the First World War.

Yet, sovereign states had hitherto been the only actors formally recognised by international law. With the emergence of the League of Nations and its agencies after the conflict, this reality changed. Empowered supranational institutions in Geneva were not only mediators of possible conflicts and guardians of world peace. These institutions were authorised enforcers of ideas and concepts of right practises to be adopted as the model by its members, overriding their authority. Perceptions of what was right

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<sup>57</sup> Article 6, ‘General Act of the Conference of Berlin Concerning the Congo’. See, for instance, *American Journal of International Law*, 3 (1), Supplement: Official Documents (Jan, 1909), p.12. See also Gann, L. H. (1988), “The Humanitarian Conscience”, Förster, Stig, Wolfgang J Mommsen, and Ronald Robinson (eds.), *Bismarck, Europe, and Africa. The Berlin Africa conference 1884 - 1885 and the onset of partition*, Oxford, Oxford University Press, pp. 321–331 and Miers, Suzanne (1988), “Humanitarianism at Berlin: Myth or Reality?” Förster, Stig, Wolfgang J Mommsen, and Ronald Robinson (eds.), *Bismarck, Europe, and Africa. The Berlin Africa conference 1884 - 1885 and the onset of partition*, Oxford, Oxford University Press, pp. 333–345.

<sup>58</sup> Porter, Andrew (1999), ‘Trusteeship, Anti-Slavery, and Humanitarianism’ in Andrew Porter and Wm Roger Louis (eds.), *The Oxford History of the British Empire: Volume III: The Nineteenth Century*, Oxford, Oxford University Press, ch. 10, pp. 198-221

<sup>59</sup> For Gerrit W. Gong, the standard of civilisation is ‘an expression of the assumptions, tacit or explicit, used to distinguish those that belong to a particular society from those that do not’. Gong, Gerrit W. (1984), *The Standard of ‘Civilization’ in International Society*, Oxford, Clarendon Press, p. 3. See also Koskeniemi, Martii (2001), *The Gentle Civilizer of Nations: The Rise and Fall of International Law. 1870-1960*, Cambridge, Cambridge University Press, chap. 2, pp. 98-178, Anghie, Anthony (2007), *Imperialism, Sovereignty and the making of International Law*, Cambridge, Cambridge University Press, and Bowden, Brett (2009), *The Empire of Civilization: The Evolution of an Imperial Idea*, Chicago-London, University of Chicago Press, especially ch.6.

fluctuated, depending on who has the ability to influence, reshape and control them. The process of negotiation of the normative ideal of colonial practises was not free of tensions and conflicts, replicating uneven relations of power within the League of Nations.

Having fought alongside the Allies during the First World War and taken part of the Treaty of Versailles' negotiations, Portugal was one of the League of Nations' founding members. Nevertheless, its power in the institution was very limited. Not being considered one of the 'Principal Allied and Associated Powers' to be granted with one of the permanent seats at the Council of the League of Nations, Portugal consecutively failed in obtaining a non-permanent seat as well. Unlike Brazil or Spain, which both announced their intention of withdrawal from membership as they were not been assigned with permanent seats on the Council of the League of Nations in 1926,<sup>60</sup> Portugal remained a member of the organisation until its dissolution. The frustration and feeling of injustice were similar to the Brazilian and Spanish one, though.

After failing the election for one of the three non-permanent members of the Council available in late 1930 in favour of Ireland, Norway, and Guatemala, the Portuguese minister of Foreign Affairs, Lieutenant-commander Fernando Augusto Branco, complained to the British ambassador in Lisbon about the infamy [sic] of a country as Guatemala – no reference to Ireland and Norway was made – being preferred to Portugal, disregarding Portugal's historical past, its immense colonial empire and its ancient culture.<sup>61</sup> In the world as envisaged by Lieutenant-commander Branco, Guatemala seemed to be equated with an empty space, without history, before the arrival of the European colonisers, contrasting with Portugal, the first European coloniser, which unquestionably deserved to be recognised as a great power due to its centennial imperial condition. The expected hierarchy of nations in this cosmovision,

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<sup>60</sup> On the role of Brazil and Spain in the 1926 crisis at the League of Nations, see respectively Leuchars, Chris (2001), 'Brazil and the League Council Crisis of 1926', *Diplomacy and Statecraft*, 12 (4), pp. 123-142 and Bledsoe, Gerie (1975), 'The Quest of Permanencia. Spain's role in the League Crisis of 1926', *Iberian Studies*, 4, pp. 14-21.

<sup>61</sup> See the report on the meeting sent to the Secretary of State for Foreign Affairs: Sir Francis Lindley to Arthur Henderson, 23<sup>rd</sup> October 1930, Kenneth Borne and D. Cameron Watt (eds), *British Documents on Foreign Affairs: Reports and Papers from the Foreign Office Confidential Print*, Part II. From the First to the Second World War, Series F. Europe, 1919-1939, Volume 24: Portugal, 1919-1939, University Publications of America, p. 160

which was shared by Portuguese elites, had been subverted. In order to restore the ‘natural order’, the Portuguese attempted to reform the allocation of non-permanent seats based on a criterion of equitable geographical distribution.<sup>62</sup> In September 1931, a formal proposal was addressed to the General Assembly of the League of Nations. Yet, its success was limited and Portugal remained electorally disenfranchised in the Council. Its vote in the Assembly, which was dominated by regional blocs, was of little value for the defence of national interests within the League of Nations.

There was a clear conflict between the lack of international recognition of the value of Portugal as global player, on one hand, and the way Portugal as a nation was perceived at home, on the other. As Augusto da Costa, a conservative journalist and regular collaborator of the official propaganda institutions, put it in an opinion article in *Jornal do Comércio e das Colónias*, European diplomacy within the League of Nations and its agencies was a game of power distribution between great and small nations. In that game, being smaller was bad luck – and Portugal, notwithstanding being a great nation, was seen as a ‘little nation in the eyes of the civilised world’. For Augusto Costa, the trope of *Portugal país pequeno* (Portugal small country) had to be immediately combated and the actual national greatness revealed.<sup>63</sup>

These disparate images of Portuguese greatness/littleness were tackled when the League of Nations and its dependent organisations turned their eyes to colonial issues beyond the mandate territories, especially when native labour came up into discussion and Portuguese colonies became under international scrutiny as during the slave cocoa scandal a couple of decades before.

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<sup>62</sup> The geographical criterion had been introduced in 1921. Report to the 2<sup>nd</sup> Assembly, League of Nations Document A.9, p. 64. Quoted in David Armstrong, Lorna Lloyd and John Redmond (1996), *From Versailles to Maastricht: international organisation in the twentieth century*, Basingstoke, Palgrave Macmillan, p. 56.

<sup>63</sup> *Jornal do Comércio e das Colónias*, 16<sup>th</sup> April 1930, p. 1.

### 1.2.1. The International Labour Organisation and Native Labour: a late interest

Born from the compromise to ‘secure and maintain fair and humane conditions of labour for men, women, and children’ as agreed on by the signatory states of the Covenant of the League of Nations,<sup>64</sup> the International Labour Organisation was created in the immediate aftermath of the First World War. Albert Thomas, a renowned long-standing – but moderate – French socialist, was the first director of the organisation. As a keen supporter of *L’Union Sacrée*, Thomas had been appointed as Under-Secretary for Munitions at the War Ministry and, later, as Minister of Munitions. Due to his key governmental posts during wartime, Thomas established important contacts with his counterparts in Britain and in post-revolutionary Russia. He had also shown an extraordinary ability to mobilise national trade union activity into the war effort and was acquainted with many of the leaders of the International Federation of Trade Union. From a strategic point of view within the League of Nations, his appointment as the first director increased the potential of political recognition of International Labour Organisation by trade union movement.<sup>65</sup> While initially his socialist background was a crucial asset in getting the job, soon his political convictions become an important aspect to discredit the International Labour Organisation in general in Portugal after the instauration of the right-wing anti-union dictatorship in 1926. Albert Thomas and his staff at the International Labour Organisation, consisting mainly in his former socialist

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<sup>64</sup> ‘Covenant of the League of Nations Adopted by the Peace Conference at Plenary Session, April 28, 1919’. See, for instance, *The American Journal of International Law*, 13 (2), Supplement: Official Documents (April, 1919), pp. 128-140

<sup>65</sup> On the complex relation between the international trade union movement and ILO in the interwar period see Tosstorff, Reiner (2005), ‘The International Trade-Union Movement and the Founding of the International Labour Organization’, *International Review of Social History* 50(3), pp. 399-433, and Van Goethem, Geert (2006), *The Amsterdam International. The World of the International Federation of Trade Unions (IFTU), 1913-1945*, Aldershot, Ashgate, especially chapter 4, ‘Geneva’. See also Tosstorff, Reiner (2010), ‘Albert Thomas, the ILO and the IFTU: A Case of Mutual Benefit?’ in Jasmien Van Daele, Magaly Rodríguez García, Geert Van Goethem and Marcel van der Linden (Ed.), *ILO Histories. Essays on the International Labour Organization and its Impact on the World during the Twentieth Century*, Bern, Peter Lang, pp. 92 – 114.

colleagues at the *École Normale Supérieure*, were invariably portrayed as well-paid leftists, living sumptuously at the expense of the League of Nations' members in the Portuguese press.

Under Albert Thomas's guidance, the International Labour Organisation initiated a prolific activity. By 1929, the organisation had already adopted 28 conventions and several recommendations dealing mainly with the limit of hours of work, minimum wage, unemployment and protection in sickness, and minimum age for work, as well as maternity protection. As Suzanne Miers noted, this demanding agenda for improving work conditions and achieving social justice was primarily intended for workforce in industrialised countries.<sup>66</sup> For instance, the Washington Convention regarding the principle of forty-eight-hours working weeks adopted in 1919 admitted that working weeks longer than the recommended could be adopted in less advanced countries.<sup>67</sup> While for the specific case of British India it was clearly stated that an extended sixty-hours week should be adopted,<sup>68</sup> in other territories under colonial rule the decision about the application – or not – of the International Labour Organisation's resolutions or recommendations was left to the colonial powers in charge of their administration. As a consequence, in accordance with the principle of dual legal systems in the colonies, the implementation of the International Labour Organisation's principles in colonial contexts became an exclusive of their white populations. More than being determined by industrial development, the decision on the adoption of the conventions or recommendations was racially differentiated in the colonies.

Although representatives of the International Labour Organisation joined the Permanent Mandates Commission of the League of Nations and, as a consequence, had a say about native labour in these territories, the issue was not at the centre of the International Labour Organisation's initial concerns. Albert Thomas himself was the representative of the International Labour Organisation at the first session of the

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<sup>66</sup> Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira, p. 133.

<sup>67</sup> See 'Hours of Work (Industry) Convention, 1919', First Session, in *International Labour Conventions and Recommendations, 1919-1951*, vol. 1, Geneva, International Labour Office. pp. 1-8.

<sup>68</sup> *Idem*, Article 10.

Permanent Mandates Commission in 1921. According to Antony Alcock, the International Labour Organisation was contrary to the use of coercion to compel natives to work as it could make them despise not only the authorities responsible for the enforcement but also the working habits that were being inflicted. For Albert Thomas, education laid at the base of the inculcation of those habits.<sup>69</sup> Nonetheless, he adopted a passive posture, restraining his intervention during the discussion about the questions concerning native labour to be included in the future questionnaires, which were intended to facilitate the preparation of the obligatory annual reports of the mandatory powers.<sup>70</sup>

John Harris of the British Anti-Slavery and Aborigines Protection Society had persistently but unsuccessfully lobbied for the intervention of the International Labour Organisation in the question of colonial peoples' labour for years.<sup>71</sup> However, the League of Nations only delegated the responsibility of dealing also with native labour to the its labour specialised agency following the 1926 Slavery Convention, which is revealing of the contemporaneous perception of native labour as a question apart from white labour.<sup>72</sup> During the Draft Slavery Convention, held in 1925 to discuss the British proposal for a new international treaty against slavery, the discussion had proven difficult. What was included or excluded from the definition of slavery appeared difficult to ascertain. The various national representatives invited to were unable to reach consensus, especially regarding conditions resembling slavery (namely debt bondage, forced marriage, serfdom or forced labour) and in what circumstances – if any

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<sup>69</sup> Alcock, Antony (1971), *History of the International Labor Organization*, New York, Octagon, p. 84.

<sup>70</sup> *Permanent Mandates Commission: minutes of the first session, held in Geneva, October 4th to 8th, 1921*, Geneva, League of Nations, pp. 37 and ff.

<sup>71</sup> Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira, p. 134; McGeehan, Nicholas (2012), 'Exploitation rebranded: how international law sold slavery as Forced labour' in David Keane and Yvonne McDermott (eds.), *The Challenge of Human Rights: Past, Present and Future*, Cheltenham - Northampton, Edward Elgar Publishing, ch. 11, p. 230

<sup>72</sup> On the 1926 Slavery Convention see Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira, ch. 9, pp. 121-133, Allain, Jean (2008), *The Slavery Conventions. The Travaux Préparatoires of the 1926 League of Nations Convention and the 1956 United Nations Convention*, Leiden-Boston, Martinus Nijhoff Publishers, and Allain, Jean (2012), *Slavery in International Law. Of Human Exploitation and Trafficking*, Leiden-Boston, Martinus Nijhoff Publishers, pp. 213-216.

– forms of unfree labour were acceptable. Whilst colonial powers insisted on the distinction between forced labour for public or for private purposes and the need to keep the former out of the provisions of the future Slavery Convention, the German delegation proposed the regulation of forced labour for public ends as well.<sup>73</sup> Acknowledging the wishes of the German Delegation would be difficult without tackling the use of forced labour in colonial contexts, which was a common practice. The complexity of the question led the Norwegian Delegate, Dr. Fridtjof Nansen, to propose that the International Labour Organisation studied the labour conditions of the colonised peoples before any international action was taken, a suggestion welcomed by the Portuguese delegation.<sup>74</sup> Despite not supporting this proposal at first, the British representative, Viscount Robert Cecil of Chelwood, was forced to accept it not to undermine the ratification of the future treaty. Hence, during the Slavery Convention in 1926, he recalled that a ‘institution exists – the International Labour Office – whose business it is to deal with the conditions of labour, and to make enquiries, studies and recommendations with regard to labour conditions all over the world’. Since the International Labour Organisation dealt with the conditions of labour – free labour and forced labour alike –, it was deemed as the most prepared institution to study the ‘best means of preventing forced or compulsory labour from developing into conditions analogous to slavery’.<sup>75</sup>

However, as Fredrick Cooper noted, defining what was free labour and where labour became unfree was a problematic issue for the 1920s and 1930s European elites.<sup>76</sup> For that reason, the International Labour Organisation’s executive body decided to create a Committee of Experts on Native Labour, composed by members with first-

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<sup>73</sup> ‘League of Nations, Question of Slavery: Report of the Sixth Committee: Resolution’, *League of Nations Official Journal, Special Supplement 33: Records of the Sixth Assembly: Text of Debates*, Nineteenth Plenary Meeting, 26 September 1925.

<sup>74</sup> See ‘A Questão da Escravatura. O projecto de protocolo de Lord Robert Cecil e a resposta do Governo Português’, *Boletim Geral das Colónias*, 16, October 1926, p. 167.

<sup>75</sup> ‘Slavery Convention: Report of the Sixth Committee: Resolution’, *League of Nations Official Journal, Special Supplement 44 - Records of the Seventh Ordinary Assembly: Text of Debates, Seventeenth Plenary Meeting, 25<sup>th</sup> September 1926*, p. 132.

<sup>76</sup> Cooper, Frederick (1996), *Decolonization and African Society. The labor Question in French and British Africa*, Ann Arbor, University of Michigan. See particularly pp. 25 and ff.

hand knowledge of labour conditions in colonial territories, with the task of studying the existing systems of forced or compulsory labour, especially in countries which were not self-governing.<sup>77</sup>

### **1.2.2. Forced Labour and Compulsory Labour: the Portuguese definitions**

The Portuguese member of the Committee of Experts on Native Labour was General Alfredo Augusto Freire de Andrade. Being the Portuguese delegate at the Peace Conference in Versailles in 1919 and also member of the Temporary Commission of Slavery, of the Permanent Mandates Commission and of Committee of Experts on Native Labour, one can say he was the voice of Portugal at the League of Nations until his death in 1929. Freire de Andrade's colonial and diplomatic experience was not limited to his aforementioned appointment as Director-General of the Portuguese Colonial Office of the First Republic Provisional Government.

Prior to the 1910 Republican revolution, Freire de Andrade accumulated administrative experiences in Mozambique. He took part of the commissions for the delimitation of boundaries between the district of Lourenço Marques and the Transvaal and also between Manica District and Rhodesia. Twice governor of Lourenço Marques District and once administrator of Manica District, Freire de Andrade was nominated governor of Mozambique in 1906, a post he kept until the establishment of the Republic. During this period at the helm of Mozambique, he was responsible for an

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<sup>77</sup> Zimmerman, Susan (2010), "Special Circumstances" in Geneva: The ILO and the World of Non-Metropolitan Labour in the Interwar Years' in Jasmien Van Daele, Magaly Rodríguez García, Geert Van Goethem and Marcel van der Linden (Ed.), *ILO Histories. Essays on the International Labour Organization and its Impact on the World during the Twentieth Century*, Bern, Peter Lang, pp. 221-250. See also Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira, ch. 10, pp. 134-151 and Maul, Daniel R. (2007), 'The International Labour Organization and the Struggle against Forced Labour from 1919 to the Present', *Labor History*, 48 (4), pp. 477-500.

unprecedented infra-structural development in the colony, building roads, railways, schools, and hospitals. Yet, it was his reforms to improve work conditions of African labourers that earned him the enthusiastic praise of Joseph Burt, who met Freire de Andrade during his tour in Portuguese Africa.<sup>78</sup> Most notably, Freire de Andrade decreed the abolition of *chibalo* (or *shibalo*), a system of forced labour with the connivance of the Portuguese authorities: anyone who desired African labourers applied to the government, which on its turn would requisition them through the regional heads of division at a standard rate per day for the required period of time.<sup>79</sup> Although the abolition of *chibalo* did not subsist to the end of Freire de Andrade's administration, this experience increased his self-confidence on his rightness as a native affairs expert and as a defender and supporter of Africans' rights.

Freire de Andrade's forceful personality stood out in the various meetings of the League of Nations in which he took part. His strong opinions on native labour soon became clear. During the sixth meeting of the First Session of Permanent Mandates Commission held on 7<sup>th</sup> October 1921, in which Albert Thomas was present, as aforementioned, a first divergence emerged, anticipating the future problems. The key of discordance was originated by different concepts and conceptions of what was acceptable with regard to native labour. Freire de Andrade insisted on the distinction between 'forced labour' and 'compulsory labour': in his opinion, natives should be entitled with the right to choose freely the nature and place of their work – therefore, labour should not be forced – but they should not be allowed to refuse to work, which would compromise not only the development and progress of tropical regions, but most of all their own improvement as men. As he had put it in his report after the publication of John Harris's *Portuguese Slavery* in 1913:

Should we let the native left to his natural inertia, to the detriment of the development of agriculture and industries possible in the country, and

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<sup>78</sup> Higgs, Catherine (2012), *Chocolate Islands. Cocoa, Slavery, and Colonial Africa*, Athens-Ohio, Ohio University Press, pp. 121-124. Vail, Leroy and Landeg White (1980), *Capitalism and colonialism in Mozambique: a study of Quelimane district*, London, Heinemann, pp. 188-192

<sup>79</sup> Hammond, Richard J. (1966), *Portugal and Africa. 1815-1910. A Study in uneconomic Imperialism*, Stanford, Stanford University Press, p. 325. On *chibalo*, see also Penvenne, Jeanne Marie (1993), 'O Trabalho Forçado e a Origem de uma Classe Trabalhadora Africana: Lourenço Marques, 1870-1962' in Jeanne Penvenne, *Trabalhadores de Lourenço Marques*, Maputo, Arquivo Histórico de Moçambique, pp. 13-44.

consequently deprived of all civilisation, or should we try to force him – by humane, just and legal means – to work for his own benefit and the benefit of the same civilisation?<sup>80</sup>

Labour was, thus, a fundamental tool for the colonisers' endeavour to civilise Africans, simultaneously creating wealth and building their character. From this perspective – which in fact was widely shared not only in Portugal but rather in the Western world in general – by imposing labour, colonisers were in fact acting in accordance with the principle of trusteeship to elevate the backward populations of the colonies for which they had been invested.<sup>81</sup> Not surprisingly, the obligation to provide their subsistence by means of work remained a constant in all the Native Labour Codes in the Portuguese Colonies that had been legislated in Portugal since the late nineteenth century. The 1914 Labour Code went further by introducing the classification of 'vagrant', applied to every African who did not voluntarily comply with his obligation to work, and by establishing of correctional work as a punishment for vagrancy.<sup>82</sup> In fact, the new stress on correctional work corresponds to a transposition of the European model to the colonial context. Although vagrancy had been criminalised and punishable

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<sup>80</sup> 'Faut-il laisser l'indigène livré à son inertie naturelle, au détriment du développement de l'agriculture et des industries possibles du pays, et par suite privé lui-même de toute civilisation, ou faut-il essayer par des procédés humaines, justes et légaux, de l'obliger à travailler à son profit et au profit de cette même civilisation?' in Freire de Andrade, A. A. (1913), *Rapport présenté au ministre des colonies, à propos du livre Portuguese Slavery du missionnaire John Harris*, Lisbon, Imprimerie Nationale, p. 6.

<sup>81</sup> Moutinho, Mário (2000), *O Indígena no Pensamento Colonial Português*, Lisbon, Edições Universitárias Lusófonas, pp. 191-235 and Jerónimo, Miguel Bandeira (2009), *Livros Brancos, Almas Negras. A "missão civilizadora" do colonialismo português, c. 1870-1930*, Lisbon, ICS. Jerónimo, Miguel Bandeira (2012), 'The "Civilization Guild". Race and Labour in the Third Portuguese Empire, c. 1870-1930', in Bethencourt, Francisco and Adrian Pearce (eds.), *Racism and ethnic relations in the Portuguese speaking world*, Oxford, Oxford University Press, pp. 173–199. For an account of the role of labour in discourses regarding Africans' education, see also Madeira, Ana Isabel (2007), *Ler, Escrever e Orar: Uma análise histórica e comparada dos discursos sobre a educação, o ensino e a escola em Moçambique, 1850-1950*, Lisbon, Faculdade de Psicologia e de Ciências da Educação da Universidade de Lisboa (unpublished PhD Thesis), pp. 196-232. See also Conklin, Alice L. (1997), *A Mission to Civilize. The Republican Idea of Empire in France and West Africa. 1895-1930*, Stanford, Stanford University Press, especially chapter 7, 'Civilization through Coercion', pp. 212-245; Conrad, Sebastian (2009), "'Education for Work" in Colony and Metropole: The Case of Imperial Germany, c. 1880-1914' in Fischer-Tiné, Harald and Susanne Gehrman (eds), *Empires and Boundaries: Rethinking Race, Class, and Gender in Colonial Settings*, London, Routledge, pp. 23-40.

<sup>82</sup> Decree 951, *Diário do Governo*, 14<sup>th</sup> October 1914.

with imprisonment up to 6 months since the 1852 Penal code, the legislation about the creation of workhouses for the punishment and regeneration of vagabonds through work in Portugal dates from 1912. Previously, the existent institutes were mainly asylums or shelters for minors, being charitable institutions rather than penal ones.<sup>83</sup>

In light of the metropolitan legislation, Freire de Andrade justified the maintenance of coercive forms of labour in the colonies during the First Session of Permanent Mandates Commission: if European legislation considered that no one had the right to abstain from work and punished vagrancy, he argued that the same principle should be laid down in the colonies. However, he noted that the same rule could not be applied everywhere in the same way. It was important to take into account that natives had a 'different temperament': their laziness and their 'childish covetousness', responsible for leading them to freely sign work contracts but later running away in the face of hard work, were 'well-known facts'.<sup>84</sup> As Alatas Syed Hussein showed in his study on the European representations of Malay, Filipino and Javanese peoples, the trope of the lazy native was deeply ingrained in the general ideology of Western imperialism, being predicated on the colonised peoples' resistance to submit to the exploitative logic of labour imposed by the colonisers.<sup>85</sup> Laziness was associated not only with different economic stages of tropical societies; living in fertile climatic zones hindered the development of the mental stage of their populations, preventing them from evolving from a permanent childhood-like condition. As it could be read on the pages of *O Século*, the newspaper with the largest circulation in Portugal in the 1930s and 1940s, 'it has been proven that most Blacks hardly work if not required to do so':

The White works because he has physical and spiritual needs to be met, as well as dreams and aspirations to fulfill. The Black does not. They do not have other

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<sup>83</sup> In other words, although they were disciplinary institutions The official repression and control of deviancy in the metropole would reach its peak between 1933 and 1951. See Bastos, Susana Pereira (1997), *O Estado Novo e os seus vadios. Contribuições para o Estudo das Identidades Marginais e da sua Repressão*, Lisbon, Publicações D. Quixote.

<sup>84</sup> *Permanent Mandates Commission: minutes of the first session, held in Geneva, October 4th to 8th, 1921*, Geneva, League of Nations, p. 16.

<sup>85</sup> Alatas, Syed Hussein (1977), *The Myth of the Lazy Native. A Study of the image of the Malay, Filipinos and Javanese from the 16th to the 20th century and its function in the ideology of colonial capitalism*, London, Frank Class.

needs beyond their stomachs' requests; and these ones they are able to satisfy effortlessly thanks to the bounty of nature in Africa.<sup>86</sup>

Since social progress of the natives advanced in accordance with their economic progress and labour was the key to invert their backward condition and personal idleness, Freire de Andrade defended that colonisers were ethically authorised to recruit, if necessary by compulsion, native labourers for essential public works and services. From his point of view, the colonised peoples were indebted to their colonisers and their labour was a fair compensation for the civilisation effort carried in their benefit: in his words, 'if civilisation steps in to protect natives in their own country against abuses which they could not defend themselves, it was only right to exact from them in turn an effort equivalent to what was done in their interests'.<sup>87</sup> In Freire de Andrade's opinion, equating compulsory labour to forced labour could conduct to a 'the consecration of the right to idleness and laziness, very prevalent in some native tribes, where the men are provided with food and drink by a real forced labour on the part of their wives'.<sup>88</sup>

This immoral aspect of the gendered division of work in African societies, which challenged both the male/female and the public/private binaries dominant in the perceived civilised world was emphasised. It was an ethical obligation of the colonisers to transform African family dynamics, which were labelled as deviance. Either voluntary or compulsory, work was a powerful civilising instrument available to colonisers to teach indigenous men how to be complete men, i.e., with traits that were associated with manliness and male psyche in western societies. Being able to provide for his family and caring for his wife – i.e. his one and only wife – and children was a key aspect of the model of European family that the coloniser aimed to impose. Labour was, thus, a mechanism of social control of the colonised's arenas of intimacy.

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<sup>86</sup> 'Está provado que a maioria dos pretos dificilmente trabalhará se não for obrigada a isso (...) O branco trabalha porque tem necessidades físicas e espirituais a satisfazer, sonhos a realizar, aspirações a cumprir. O preto não. Sem outras necessidades além das do estômago, estas satisfá-las ele sem esforço graças à prodigalidade da natureza africana.' *O Século*, 8<sup>th</sup> July 1930, p. 1.

<sup>87</sup> *Permanent Mandates Commission: minutes of the first session, held in Geneva, October 4th to 8th, 1921*, op. cit., pp. 16-17.

<sup>88</sup> *Permanent Mandates Commission: minutes of the first session, held in Geneva, October 4th to 8th, 1921*, op. cit., p. 37.

Accordingly, the Native Labour Code in force in the Portuguese empire at the time, despite liberating Africans who possessed sufficient means of subsistence (either through accumulated capital or the regular practice of a profession) from the imposed obligation to work, stressed that, if those means were achieved through the work of their wives or children, that provision did not apply.<sup>89</sup> In this way, while the process of replacement of the traditional native family with the modern family ideal was not complete, it was up to western men to protect indigenous women and children from the abuses of their uncivilised husbands and fathers: ‘How was female and child labour to be protected if idleness was permitted on the part of men and was rendered possible that only the women and children worked for them?’, rhetorically asked Freire de Andrade to his counterparts during the Permanent Mandates Commission’s meeting.<sup>90</sup> According to this line of reasoning, by compelling native men to work the colonisers were not restricting freedoms but rather liberating the weaker elements from the abuses characteristic of their own African backward societies.

In short, insistence regarding the compulsion to work resulted – it was argued – from the fact that the Portuguese colonisers’ were more compassionate and dedicated to the improvement of natives’ lives than the other members of the Permanent Mandates Commission. By condemning forms of compulsory labour, international community revealed how much they did not care. It was peculiarly Portuguese to be that concerned with Africans well-being. Freire de Andrade continued to fiercely defend his perspective – which corresponded to the official perspective of the Portugal in the League of Nations – about the compulsory work for uncivilised peoples in the following years. Notably, on the behalf of the Portuguese government, he took the initiative of submitting a note to the Temporary Commission of Slavery’s Drafting Committee in charge of the preparatory works for the Slavery Convention as a response to the British Draft Protocol in which the future League of Nations’ convention for the suppression of slavery was based. The main objection of the Portuguese government to the Protocol was that ‘its wording lacks that clarity and precision demanded by a question vital to the

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<sup>89</sup> Decree 951, *Diário do Governo*, 14<sup>th</sup> October 1914, art. 4.

<sup>90</sup> *Permanent Mandates Commission: minutes of the first session, held in Geneva, October 4th to 8th, 1921*, op. cit., p. 37.

development of the colonies as well as that of the natives'.<sup>91</sup> What was forced labour and what was compulsory labour? From the Portuguese point of view, they were two different concepts being wrongly used interchangeably. Different agents could have different interpretations, according to their own interests and in disregard of the civilising mission. First, uncivilised 'native races' could see it as a suggestion that the prohibition 'implies for them a right to idleness', which was contrary to 'their well-being and their development'.<sup>92</sup> Moreover, colonial powers could face 'grave difficulties' either a broad or narrow reading of the recommended regulations on forced labour was made:

On the one hand, they [colonial powers] might be accused of not respecting the regulations of the Protocol, as now proposed, and on the other, if by too rigid an interpretation of the same Article they deprived themselves of local labour, they might equally be accused of not developing sufficiently in the interests of humanity, the riches and resources of those African countries placed under their sovereignty.<sup>93</sup>

At the end, the Portuguese delegate was unable to get his way on the need for refining the distinction between forced and compulsory labour. By the time the International Labour Organisation convened its Fourteenth Session in Geneva, having placed the ratification of the Convention concerning Forced or Compulsory Labour on its agenda, the same definition that had been adopted during the 1926 Slavery Convention was in use: forced or compulsory labour included 'all work or service which is exacted from any person under the menace of any penalty for its non-performance and for which the worker does not offer himself voluntarily'.<sup>94</sup>

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<sup>91</sup> *Note Submitted to the First Sub-Commission of the Sixth Committee by the Portuguese Delegate, General Freire d'Andrade, Geneva, League of Nations (A. VI/S.C.1/2.1925, 11<sup>th</sup> September 1925), p. 4.*

<sup>92</sup> *Note Submitted to the First Sub-Commission of the Sixth Committee by the Portuguese Delegate, General Freire d'Andrade, op. cit., p. 3*

<sup>93</sup> *Note Submitted to the First Sub-Commission of the Sixth Committee by the Portuguese Delegate, General Freire d'Andrade, op. cit. p. 5.*

<sup>94</sup> *International Labour Organisation Fourteenth Session – Geneva 1930, Forced Labour – Second Discussion, Report I, Geneva, ILO, p. 132.*

The Committee of Experts on Native Labour had its first meeting in preparation of the 1930 Forced Labour Convention from 4<sup>th</sup> to 8<sup>th</sup> December 1928 with the aim of draft a questionnaire to serve as a basis for the upcoming Forced labour Convention. Amongst the documents provided for discussion by the committee was the new Portuguese Native Labour Code, conspicuously promulgated on 6<sup>th</sup> December of that year in order to meet the International Labour Organisation's guiding principles.<sup>95</sup> Correction work was removed in this new Native Labour Code. The 'moral and legal obligation' to work of the 1914 Native Labour Code was substituted by a 'moral duty' whose failure to comply with did not involve a legal sanction. Freire de Andrade was unable to take part in the meeting and elaborate on the differences between the two Portuguese Native Labour Codes due to illness. He would die a few months later. Yet, the position regarding the distinction of forced and compulsory labour that he fervently defended remained at the core of the Portuguese delegation within the League of Nations and its agencies.

When Léon Jouhaux, the French Workers' Group representative, asked for a broader discussion of the draft questionnaire on Forced Labour during the Twelfth International Labour Conference, in 1929, Vasco de Quevedo, the Extraordinary Envoy and Plenipotentiary Minister of Portugal at Berne and at the League of Nations, seized the opportunity to recall that 'the expression forced labour may led to erroneous ideas'. He argued that every civilised country had some degree of compulsion to labour as a consequence of modern industrialisation. Since 'civilisation for its own defence requires industry', colonising countries could not rescue countries from a lower stage of advancement without requiring 'a certain degree of industry on the parts of the peoples which it is benefiting'. Therefore, if rigid rules were adopted, 'the whole progress of civilisation throughout the world will be threatened', preventing the elevation of the natives. Although the principles behind an inflexible interpretation of what should be condemned and accepted as forced labour were considered noble, their application was counterproductive: 'the civilising nations will find that, though fulfilling humanitarian

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<sup>95</sup> Decree 16.199, *Diário do Governo*, 6<sup>th</sup> December 1928.

ideas, they do not achieve humanitarian results'.<sup>96</sup> Therefore, from his point of view, civilising nations should be free to administer their colonies and the International Labour Organisation's interference would be irresponsible.

The discontentment about what was perceived as a critical intrusion of the International Labour Organisation in colonial administration and native policies marked the Portuguese reply to the Forced Labour Questionnaire. What was at stake, it was argued, was the 'dignity and rights' of the colonising countries, which were being contested by countries which did not have colonies in order to undermine the ongoing work of colonisation and civilising mission.<sup>97</sup> With the exception of Britain, the other colonial powers shared the same point of view. Hence, the French government took the initiative to invite colonial powers for a joint examination and discussion of the questionnaire. In the words of the French minister of colonies François Piétri, the forced labour question was 'so closely, [and] so specifically colonial, that it can't be treated with 54 powers, of which, as fair as I know, 46 do not possess any colony'.<sup>98</sup> Moreover, French government insisted that the provisions of the Forced labour Convention as they were being discussed favoured Britain, whose West African colonies were already more developed economically and more populated, facing less difficulties in the recruitment of African labourers.<sup>99</sup>

On their second meeting of the colonial powers' preparatory conference, held a month before the 1930 International Labour Conference in which the Forced Labour Convention was adopted, it was clear that an agreement would not be reached.

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<sup>96</sup> *International Labour Conference. Twelfth session, Geneva - Provisional Record, XIX<sup>th</sup> Sitting, Monday 3<sup>th</sup> June 1929*, Geneva, ILO, p. 44.

<sup>97</sup> *International Labour Organisation Fourteenth Session - Geneva 1930, Forced Labour - Second Discussion, Report I*, Geneva, ILO, p. 18.

<sup>98</sup> 'Une question aussi étroitement, aussi spécifiquement colonial ne fût point traitée par 54 puissances dont, à ma connaissance, 46 ne possèdent pas la moindre colonie.' Intervention of the minister of Colonies on 25<sup>th</sup> March 1930 during the discussion of the 1930 colonial budget in the Senate of the French Parliament. *Journal officiel de la République française. Débats parlementaires. Sénat*, 26<sup>th</sup> March 1930, p. 481. By direct request of the Portuguese minister of Foreign Affairs, the Portuguese legation in Paris immediately sent a copy of the *Journal officiel de la République française. Débats parlementaires*, with François Piétri's speech outlined, to Lisbon. Arquivo Histórico Diplomático - Ministério dos Negócios Estrangeiros (henceforth AHD - MNE), 3<sup>o</sup> piso, Armário 1, Maço 366.

<sup>99</sup> Conklin, Alice L. (1997), *A Mission to Civilize. The Republican Idea of Empire in France and West Africa. 1895-1930*, Stanford, Stanford University Press, p. 235.

According to the Portuguese representative, Count Penha Garcia, perspectives proved to be very different and irreconcilable from the first moment: while Portugal, France, Belgium, and the Netherlands defended ‘the independence and the rights of the colonial mission’, Britain had ‘absolutely radical ideas and demands’, defending the full abolition of compulsory labour within a period of three years (for the private purposes) and five years (for public purposes). In the light of these divergences, Penha Garcia suggested that Portugal should not compromise on the ratification of the Convention.<sup>100</sup>

Penha Garcia was not the Portuguese delegate to the XIV International Labour Conference but his suggestion was followed. Portugal, as well as France and Belgium, abstained from voting for the Convention on forced labour approved on 28<sup>th</sup> June 1930. On his arrival from Geneva, the chief of the Portuguese delegation to the International Labour Conference, Augusto de Vasconcelos, clarified the Portuguese delegation could not have voted neither for it nor against it: while rejecting the interference of some terms of the Convention with the legitimate sovereignty of colonial powers, Portugal accepted to the principle of abolition of forced labour – and, in fact, none of the recommendations approved was ‘far more liberal and humanitarian in their orientation than the Portuguese legislation’.<sup>101</sup> The Portuguese legislation regarding native labour was considered as exemplary on its own. Voting for the Convention would have prevented the Portuguese from doing what they knew best: gently and patiently civilising the native through work. Voting against the Convention could have given the wrong idea that Portugal was favourable to forms of labour analogous to slavery and it was crucial to avoid any association between Portugal and forced labour, slavery or any kind of mistreatment of colonised people that could compromise even more the image of the nation in the international arena. Indeed, in addition to the scandal of São Tomé and Príncipe’s slave cocoa in the 1900s and 1910, the image of Portugal had already been compromised also within the League of Nations’ institutions.

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<sup>100</sup> See copy of the Count Penha Garcia’s report sent to the minister of Foreign Affairs. AOS, NE-5A, Ex 449, pt. 6, pp. 365-366, p. 382.

<sup>101</sup> *Diário de Notícias*, 4<sup>th</sup> July 1930, p. 1. See also *O Século*, 6<sup>th</sup> July 1930, p. 1 and p. 5.

### 1.2.3. Native labour policies in the Portuguese Empire: the model or 'worse than slavery'?

On 5<sup>th</sup> June 1925, the Temporary Slavery Commission received Edward Alsworth Ross's *Report on employment of native labor in Portuguese Africa*.<sup>102</sup> Edward Ross was a Professor of Sociology at the University of Wisconsin engaged in the Social Gospel movement, who, in his words, had been invited by 'some Americans who care about the fate of these natives [in Portuguese Africa] to dig up the truth back of the many harrowing accounts that had been coming in from missionaries, consuls and business men'.<sup>103</sup> During eleven weeks, Edward Ross and R. Melville Cramer, a New York physician specialised in psychology and psychiatry, visited villages and labourers in plantations and road construction in both Angola and Mozambique. They collected testimonies from both African workers and European residents in order to probe labour conditions of the Africans in the Portuguese colonies. The final report included also an appendix on labour recruitment in Angola for plantations in São Tomé and Príncipe, based on the literature published during the slave cocoa scandal. In Angola and Mozambique, Ross and Cramer found evidence of overtaxing and forced labour, as well as the inexistence of medical services, the persistence of physical punishment, and other forms of authorities' abuses. The appalling portrait in their report was completed with accounts of episodes of starvation, people being taken against their will far away from home for work and never returning, corporal punishment and even rape with impunity. According to one testimony collected in one of the Angolan villages, the labour regime in force in the Portuguese colonies was getting worse and instead of showing betterments. It is worth to quote at length:

They [the Africans interviewed] say that in the time of the monarchy (before 1910), although they were slaves, they were better off and got more for their

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<sup>102</sup> Ross, Edward (1925), *Report on employment of native labor in Portuguese Africa*, New York, The Abbot Press.

<sup>103</sup> Ross, Edward (1977), *Seventy Years of It: an autobiography*, New York, Arno Press, p. 190

work. Their lot is getting harder. Things got abruptly worse for them in 1917-1918. The Government makes them work but gives them nothing. They return to find their fields neglected, no crops growing. They would rather be slaves than what they are now. As slaves, they had value and were not underfed, but now nobody cares whether they live or die. This Government serfdom is more heartless than the old domestic slavery, which was cruel only when the master was of cruel character. Now they are in the iron grasp of a system which makes no allowance for the circumstances of the individual and ignores the fate of the families of the labor recruits.<sup>104</sup>

Along this paragraph the reader of the report's printed version would have found a revealing three-word summary: 'worse than slavery'.

When the report was submitted to the Temporary Slavery Commission, the doubts about the Portuguese methods of colonisation in use in the African continent became more intense. Similar accusations had been presented by the Bureau for the Protection of Indigenous Peoples, in 1923, and the Anti-Slavery and Aborigines Protection Society, in 1924, but in none of these occasions the reports were as impactful as the Professor Ross and Dr. Melville Cramer's work. The report was instrumentalised by Viscount Robert Cecil of Chelwood during the 1925 Draft Slavery Convention as a weapon to intimidate the General Freire d'Andrade: provided with a copy, he hoped to avoid making concessions in the original British proposal, which was already criticised in Britain for being so loose 'that even Portugal could sign'.<sup>105</sup>

In Portugal, Edward Ross's report caused passionate patriotic protests similar to the ones caused after the allegations of slavery in the islands of São Tomé and Príncipe had caused in the beginning of the twentieth century. Both the mainstream press and the periodicals devoted to colonial topics published fervent objections to Ross's conclusions, questioning not only the sociologist's methods of enquiry but also the

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<sup>104</sup> Ross, Edward (1925), *Report on employment of native labor in Portuguese Africa*, New York, The Abbot Press, pp. 11-12.

<sup>105</sup> Miers, Suzanne (2003), *Slavery in the Twentieth Century: the Evolution of a Global Problem*, Walnut Creek, Altamira, p. 123, p. 125.

intentions behind the League of Nations.<sup>106</sup>The long reply of the Portuguese government sent to the League of Nations was reproduced in the journal of the Colonial Propaganda Agency, as well as by *Diário de Notícias*, which published it in the easily detachable (and easily collectable) space that was generally intended to novels and thrillers.<sup>107</sup> In fact, for the Portuguese government, Ross and Cramer's report was more or less that: a fictional account. The authors did not give precise identifications of places and people involved, which made impossible to confirmation of their veracity. None of them spoke either Portuguese or the native languages so they had to rely on interpreters who would 'naturally translate the way it seemed more pleasing to those who paid him'.<sup>108</sup> According to Portuguese authorities in Angola, Ross had not even spent the number of days in the colony he wrote he did.<sup>109</sup> To sum up, Edward Ross did not have legitimacy to judge the Portugal's colonial administration; by doing so albeit his poor knowledge about the visited colonial territories and their peoples, he had 'unjustly mistreated' the Portuguese Nation.<sup>110</sup>

With Ross's Report still fresh in collective memory and native labour on the spot at the International Labour Organisation, the narrative about unfair mistreatments by hostile agents at the international arena gained momentum once again, creating an optimal background for national affirmation at the domestic arena. As cultural approaches have shown, nationalism and national identity are relational phenomena, predicated on logics of inclusion and exclusion. The construction and dissemination of a certain image of the Nation is based not only on a shared culture, a collective history, and a common territory but also on the possession of common enemies, either they are

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<sup>106</sup> On the reception of Ross' Report in the Portuguese press, see Jerónimo, Miguel Bandeira (2009), *Livros Brancos, Almas Negras. A "missão civilizadora" do colonialismo português, c. 1870-1930*, Lisbon, ICS, pp. 226 and ff.

<sup>107</sup> *Boletim Geral das Colónias*, 6, December 1925, pp. 179-190; *Boletim Geral das Colónias*, 7, January 1926, pp. 149-162; *Boletim Geral das Colónias*, 8, February 1926, pp. 159-164; *Diário de Notícias*, 30<sup>th</sup> September and 1<sup>st</sup>, 3<sup>rd</sup>, 5<sup>th</sup>, 8<sup>th</sup>, 10<sup>th</sup> and 11<sup>th</sup> October, all in p. 4, and 12<sup>th</sup> October, p. 5.

<sup>108</sup> *Boletim Geral das Colónias*, 6, December 1925, p. 184.

<sup>109</sup> Santos, F. M. de Oliveira (1930), *Reply to the accusations addressed to the League of nations by Mr. Edward A. Ross, against the Portuguese in Angola*, Lisbon, Sociedade de Geografia de Lisboa, p. 3.

<sup>110</sup> *Boletim Geral das Colónias*, 8, February 1926, pp. 158-159.

real, imminent, potential or invented. The national ‘we’ is defined against the rival ‘other’ – or rival ‘others’.<sup>111</sup> Thus, the debate about forced labour at the International Labour Organisation in 1930 favoured the disclosure of perceived foreign enemies of the Portuguese nation. Portugal was alone, being forced to defend itself and its empire on several fronts. The Portuguese foreign enemies can be roughly divided in two categories, both of them hidden behind a false humanitarianism label.

First, Portugal was under attack by socialists and communists. In the pages of *Diário de Notícias*, Vasco Borges, a former Minister of Foreign Affairs, preached against the ‘Moscow spirit’ predominant in the International Labour Organisation. He recalled that colonial powers were just a small minority within the Organisation, while ‘philanthropists, fantasists, and delegates of the Third International’ dominated: it was a context favourable to ‘a campaign against indigenous labour and against social discipline’ in order to promote chaos and anarchy in the colonies.<sup>112</sup> The adoption of the International Labour Organisation’s recommendations on indigenous labour was represented as the first step for the end of white domination in the colonies and, consequently, the end of colonialism itself.

In a similar vein, an editorial *O Século* claimed that the true objectives of the International Labour Conference on forced labour was to bring unionism and socialism to Africa rather than protecting natives from abuses. The most direct consequence of this concerted action of communist internationalism was clear for the author: colonial powers would face significant losses of their sovereignty and ‘in the name of the freedom of labour of Blacks, freedom of Whites would be restrained’.<sup>113</sup> In that sense, Portugal was not only defending national interests by contesting the International Labour Organisation’s recommendations on native labour but rather something bigger than the nation. It was a fight between two competing political systems: socialist internationalism opposed to the European-dominated world system of capitalist economy and imperialism; Portuguese nationalism defended it. By taking the lead in the

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<sup>111</sup> Linda Colley’s seminal study on the British case empirically demonstrated how the reference to other nations is essential in this process of definition of a national identity. Colley, Linda (1992), *Britons. Forging the Nation, 1707-1837*, New Haven – London, Yale University Press.

<sup>112</sup> *Diário de Notícias*, 5<sup>th</sup> December 1930, p.1.

<sup>113</sup> *O Século*, 8<sup>th</sup> July 1930, p. 1.

defence of the rights of colonial powers in Geneva, Portugal was represented as the most committed nation with the protection of (European) Civilisation itself and of the interests of the most advanced race so that inferior races could evolve as well. It is worth to quote at length another editorial of *O Século*:

Proportionally, the European race is to inferior races as England is to India. If it were not for white race's social discipline to keep them [the inferior races] in order, what would happen next? Have people in Geneva already thought about the possibility of racial struggles, which would inevitably happen when the inferior races could be equal – equal not in force, but rather in aptitude –, with the white race? Humanitarianism, which is now very glorified, either is thoughtless or, what is most likely, is hiding in its heart the germ of Communist doctrines that Soviet Russia intends to bring all over the world, [in order to] subverting it.<sup>114</sup>

Social discipline – and, implicitly, racial discipline – seems to be a key concept here. The tone in use strikingly resembles Michel Foucault's conceptualisation of discipline as a mechanism of power for the regulation of the behaviour of individuals in eighteenth century European societies. In truth, the editorial of *O Século* explicitly expressed the view that representatives of colonial powers in the League of Nations did not dare to say out loud. Coercive labour was a necessary form of discipline to maintain colonial order, facilitating the control of the colonised peoples – creating 'docile bodies', to use Foucault's terms: 'Discipline increases the forces of the body (in economic terms of utility) and diminishes these same forces (in political terms of obedience).'<sup>115</sup>

Second, Portugal was under attack by capitalists. Unlike the socialist or communist enemy, the capitalist enemy did not intend to end colonial order but rather to

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<sup>114</sup> 'A raça europeia está, para as raças inferiores, na proporção em que a Inglaterra está para a Índia. Se não fosse a disciplina social da raça branca mantê-las em ordem, o que sucederia depois? Em Genebra já terão pensado na hipótese da luta das raças, que fatalmente se daria quando as inferiores pudessem estar em igualdade, não de força, mas de inteligência, com a raça branca? O humanitarismo, agora tão apregoado, ou é leviano ou então, o que é mais provável, esconde em si o germe das doutrinas comunistas que a Rússia soviética pretende levar a todo o mundo e que ela própria subverterá.' *O Século*, 21<sup>st</sup> March 1931, p. 1.

<sup>115</sup> Foucault, Michel (1977 [1975]), *Discipline and Punish: the Birth of the Prison*, London, Penguin Books, p. 138.

renovate it for its own profit. For Caetano Gonçalves, a Supreme Court judge of Goan origin who had been Governor General of Angola and parliamentary member for Benguela at the Constituent Assembly of the Republic, control of labour, which was the most significant contributing factor of wealth along with capital, had to be placed in a wider context of capitalist interests and fears of expropriation of the weaker nations in order to satisfy these interests. In his opinion, uncontrolled, greedy capitalism was the true force behind the false humanitarianism that dominated the colonial question – and the question of native labour, in particular – in the League of Nations and its agencies.<sup>116</sup> In the mainstream press, this ‘greedy capitalist enemy’ that invoked humanitarian reasons for increasing its economic and also geopolitical power had a name: Britain.

With the abolition of the slave trade in 1807 and the emancipation of enslaved people in most of the British empire from 1834, being ‘anti-slavery’ became a crucial element of British national identity, fuelling a sense of moral superiority in relation to other colonising countries.<sup>117</sup> As *O Século*’s correspondent in Geneva put it, by the time slavery and native forced labour were being discussed in the League of Nations, the British had been self-identifying as ‘the most anti-slavery people of the globe’ for many many years.<sup>118</sup> Yet, as the confrontation between Portuguese and British conceptions on forced labour sharpened in Geneva, so did the contestation of Britain’s self-claimed role as leader of humanitarian crusades against slavery and forced labour by the Portuguese. The claim that slavery remained very much a part of British commerce and empire even after its abolition, especially in the use of slave labour in Britain’s African colonies, was emphasised in the Portuguese press. The lack of Britain’s legitimacy to question native labour systems in the Portuguese colonies, which was corroborated by the late abolition of slavery in territories under British dominion, such as Sierra Leone, Gambia or the Nyasaland Protectorate, was evident.<sup>119</sup> From this perspective, the reasons for Britain’s

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<sup>116</sup> Gonçalves, Caetano (1931), ‘Portugal colonial na Sociedade das Nações’, *O Instituto*, 4<sup>a</sup> Série, 82 (1), p. 99.

<sup>117</sup> Hall, Catherine (2002), *Civilising Subjects. Metropole and Colony in the English Imagination. 1830-1867*, Cambridge, Polity; Huzzey, Richard (2012), *Freedom Burning: Anti-Slavery and Empire in Victorian Britain*, Ithaca - London, Cornell University Press.

<sup>118</sup> *O Século*, 23<sup>rd</sup> September 1931.

<sup>119</sup> *O Século*, 23<sup>rd</sup> September 1931, p. 1. *O Século*, 8th July 1930.

passionate effort to eradicate labour conditions analogous to slavery beyond its own dominions – even though slavery itself existed within its empire – were economic, as happened with the pressure for the abolition of slave trade almost a century before.<sup>120</sup>

In parallel to the process of questioning Britain's credibility in the role of the humanitarian agent par excellence in ending slavery and forced labour, it occurred an attempt to replace it with Portugal. Despite being 'the most targeted nation in the research of certain agencies connected with the League of Nations', Portugal was represented as an exemplary colonial power in the treatment given to its natives, before and after they were civilised.<sup>121</sup> In order to do so, the continuity between the first laws for the improvement of enslaved peoples' condition, in 1701, for the emancipation of Brazil's indigenous people from forced labour, in 1755, and for granting the same rights to Christians born in the Portuguese State of India that those born in the metropole, in 1761, and the successive legislation until the more recent Native labour Codes was emphasised. They were all originated by the inherent humanitarianism of the Portuguese colonisers, which was inscribed in their national character, being a natural feature of their temperament.<sup>122</sup> António Brásio, a priest and amateur historian responsible for several scientific enterprises in the *Estado Novo*, would later argue that 'given the innate Christian mildness of our nationals and the feelings of discontentment which we have always expressed against systematically aggressive forms of racism' Africans in Portugal had never been slaves in a strict sense but rather servants, being

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<sup>120</sup> In his acclaimed study on the abolition of slavery, José de Almeida Correia de Sá, the sixth Marquis of Lavradio, argued that '[British] interest in ending slave trade was to cease it in other European colonies, where the easy recruitment of slaves facilitated the access to labour force, making it impossible for England to compete with colonial products of other nations in the markets'. Correia de Sá, José de Almeida (1934), *A Abolição da escravatura e a Ocupação do Ambriz*, Lisbon, Livraria Bertrand, pp. 53-54. The book was awarded the 1934 first prize in the category of non-fictional text in the competition for Colonial Literature promoted by the General Agency for the Colonies.

<sup>121</sup> Lima, Alfredo Lisboa de (1930), 'O Palácio das Colónias Portuguesas', *Boletim da Sociedade de Geografia de Lisboa*, 48th Series, n. 9-10 (September-October 1930), pp. 211-215.

<sup>122</sup> Gonçalves, Caetano (1931), 'Portugal colonial na Sociedade das Nações', *O Instituto*, 4<sup>a</sup> Série, 82 (1), p. 98. Almada, José (1932), *Apontamentos Históricos sobre a escravatura e o trabalho indígena nas colónias portuguesas*, Lisbon, Imprensa Nacional; Coutinho, Martinho Pereira (1936), *O trabalho indígena nas colónias portuguesas*, Lisbon, Instituto superior de Ciências Económicas e Financeiras. We will return to Portuguese 'natural' humanitarianism and the importance of religion in shaping Portuguese character in chapter 5.

treated almost as family members.<sup>123</sup> In this sense, Portugal did not need conventions imposed from the outside to protect the rights of native labourers: it had created the ‘true formula’ of colonial humanitarianism ‘long before the appearance of the International Labour Organisation and Mr Thomas’ because the concern with native well-being was quintessential Portuguese.<sup>124</sup>

In this context, it is not surprising that one of booklets distributed by the Portuguese commission at the *Exposition Coloniale Internationale* in Paris, in 1931, was a French translation of the 1928 Native Labour Code in Portuguese Africa. The text of the Native Labour Code was preceded by an introduction underlining that the Portuguese legislation was not a consequence of the international definition of human rights but rather a continuation of the civilising mission that had guided Portuguese governments since the fifteenth century. Visitors of the *Exposition Coloniale Internationale* should be enlightened about what was the reality of native labourers in the Portuguese colonies: in truth, ‘only a bad knowledge of history may lead to the accusations, which emerge from time to time, that Portugal’s external action in the world over time has been dominated by a mentality of servitude and slave trade’.<sup>125</sup> Also in Paris, Henrique Galvão, a famous colonial publicist and prolific author of colonial fiction and monographs and former governor of Huila Province (Angola), took advantage of the participation in the International Congress of Colonial Press organised in parallel with the *Exposition Coloniale Internationale* to exhort to the involvement of printed media in colonial countries, in especially the press specialised in colonial affairs, in the ‘refutation of the arguments and ideas contrary to colonial realities’ that the League of Nations was spreading regarding native labour. In his opinion, the ‘utopic verbal humanitarianism’ was a creation inspired by the URSS on order to create

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<sup>123</sup> Brásio, António (1944), *Os Pretos em Portugal*, Lisbon, Agência Geral das Colónias (Colecção Pelo Império n. 101), p. 9.

<sup>124</sup> *O Século*, 21<sup>st</sup> March 1930, p.1

<sup>125</sup> ‘Seule une méconnaissance de l’histoire peut, de temps à autres, imputer au Portugal une pensée prépondérante de servitude et de trafic dans l’action extérieure qu’il exerça dans le monde depuis lors jusqu’a nos jours.’ *Code du Travail des Indigènes dans les colonies portugaises d’Afrique*, Lisbon, Imprensa Nacional de Lisboa, p.5.

problems to the economies of colonial powers rather than to protect Africans and the press was vital to unveil the plot.<sup>126</sup>

In fact, the participation in the Parisian event was seen as an important vehicle for publicly contest the image of Portuguese native labour policies as ‘worse than slavery’ from the very first moment, transmitting the intended message to as many people as possible, including those who were usually excluded from the debates about native labour.<sup>127</sup> The preliminary committee responsible for defining the direction of the Portuguese section in *Exposition Coloniale Internationale* was aware of the importance of maximising the advantages of the event due to the unfavorable international situation faced by Portugal at the moment. Being absent would have damaged Portugal’s international reputation and could have weakened Portugal’s political position as a colonial power.<sup>128</sup> Contesting criticisms against Portuguese colonialism in the League of Nations justified the investment. As Armando Cortesão put it in the July issue of the *Boletim Geral das Colónias*, the exhibition was an effective way for silencing the ‘shouting of the greedy, of the disorderly, and of the inept about colonialism’ from Geneva’.<sup>129</sup> Taking into account that the International Labour Organisation’s Forced Labour Convention had been signed on 28<sup>th</sup> June, there is little doubt about what he meant.

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<sup>126</sup> Galvão, Henrique (1931), *La Presse Coloniale et Problème du Travail Indigène. Thèse présentée au Congrès International de la Presse Coloniale*, Lisbon, Ottosgráfica

<sup>127</sup> The bibliography on international exhibitions is extensive, rising most notably from the mid 1980s. Robert Rydell’s, Paul Greenhalgh’s, and Tony Bennett’s initial contributions to the field stand out: Rydell, Robert W. (1987), *All the World’s a Fair: Visions of Empire at American International Expositions, 1876-1916*, Chicago, University of Chicago Press; Greenhalgh, Paul (1988), *Ephemeral Vistas: The Expositions Universelles, Great Exhibitions and World’s Fairs, 1851-1939*, Manchester, Manchester University Press; Bennett, Tony (1988), ‘The Exhibitionary Complex’, *New Formations*, 4, pp. 73-102. For a brief account of Portugal’s participation in major international exhibitions between 1851 and 1992, see Louro, Ilídio (1996), ‘Portugal e as Exposições Universais’, *História*, 27, pp. 4-21

<sup>128</sup> Copy of the final report of preliminary committee, 19<sup>th</sup> April 1930, Arquivo Histórico Ultramarino (hereafter AHU), MU, 1B, cx. 397, mc. 1931- Comissariado Geral da Exposição Portuguesa em Paris, p. 2.

<sup>129</sup> Cortesão, Armando (1930), ‘A participação de Portugal em Exposições Internacionais Coloniais’ in *Boletim Geral das Colónias*, vol. VI (61), July 1930, pp. 18-19.

### 1.3. After the 1930 Forced Labour Convention

Portuguese authorities did not ratify the International Labour Organisation's Forced Labour Convention until 1956. The Convention entered in force on 1<sup>st</sup> May 1932 and France and Belgium began talks with a view to adopting the convention in the future, which would happen in 1936 and 1944, respectively. Although the Portuguese delegate at the League of Nations had questioned if Portugal should not follow the French and Belgian examples, the Council of the Portuguese Empire, the highest consultative organ of colonial administration at the time, had considered that 'nothing justifies the urgency of ratification of the forced labor Convention'.<sup>130</sup> Portugal was increasingly more isolated as a colonial power but its position regarding native labour within the League of Nations did not change.<sup>131</sup> From 1932, the Portuguese representative on the Committee of Experts on Native Labour was José de Almada, the aforementioned young First Secretary in the Portuguese Colonial Office who passionately defended the national perspective during the 'slave cocoa' scandal in 1913 and now adviser for colonial issues at the Ministry of Foreign Affairs. As part of this latter job, he had accompanied the Portuguese delegation at the International Labour Conferences in 1929 in 1930 as a silent observer. His conferences reports to the Minister of Foreign Affairs show that he was carefully refining the strategy for the

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<sup>130</sup> Parecer do Conselho do Império Colonial n<sup>o</sup> 12, 1 de março de 1937. See AHU, MU, DGAPC, Junta Central de Trabalho e Emigração, mç. 996, processo 22, parecer n<sup>o</sup> 55 da 2<sup>o</sup> secção.

<sup>131</sup> Keese, Alexander (2003), "'Proteger os pretos": Havia uma mentalidade reformista na administração portuguesa na África tropical (1926-1961)?', *Africana Studia* 6, pp. 97-125, Jerónimo, Miguel Bandeira and José Pedro Monteiro (2012), 'Das «dificuldades de levar os indígenas a trabalhar»: O sistema de trabalho nativo no império colonial português', Jerónimo, Miguel Bandeira (ed.), *O Império Colonial em Questão (Sécs. XIX-XX): Poderes, Saberes e Instituições*, Lisbon, Edições 70, pp. 159-196, Keese, Alexander (2013), 'Searching for the Reluctant Hands: Obsession, Ambivalence and the Practice of Organising Involuntary Labour in Colonial Cuanza-Sul and Malange Districts, Angola, 1926-1945' in *Journal of Imperial and Commonwealth History*, 41 (2), pp. 1-21.

Portuguese defence in order to protect the nation and its empire from the dangers of internationalism within the League of Nations.<sup>132</sup>

With the dissolution of the League of Nations and the beginning of decolonisation in the aftermath of the Second World War, new challenges were posed to Portugal. When the United Nations Economic and Social Council requested Portuguese collaboration in order to elaborate a survey on forced labour in the Portuguese colonies in early 1950, suggesting that forced labour was still in use, José de Almada was once again called to intervene. He was the coordinator of the Portuguese reply, giving instructions to the officers at the Portuguese embassy in Washington. In Almada's opinion, Portugal should claim that, as a non-UN member, it could not tolerate any intermission of the international organisation in its own territory. Nevertheless, the Portuguese government should also make clear that it would be pleased to inform the United Nation about the legislation protecting native labour in force in the Portuguese colonies.<sup>133</sup> Almada was aware that refusing to cooperate could be frowned upon in the United Nations. However, he also knew that the survey's results could be even more inconvenient to Portugal.

Cadbury and Burt's criticisms to Angolan labourers' recruitment for the plantations in São Tomé and Príncipe at the beginning of the twentieth century, which had been so vehemently denied by the Portuguese at the time, were still valid. In the 1941 report of the Chief curator for Angola's Natives, it was mentioned that Angolans were so frightened about labour contracts in São Tomé and Príncipe due to the lack of fulfilment of the promise of repatriation that some of them preferred to throw themselves to the ocean when they were on their way to the islands.<sup>134</sup> As late as 1945,

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<sup>132</sup> Both documents are held in Arquivo Histórico Diplomático. AHD-MNE, 3º piso, Armário 1, Maço 365, Pr. 83, vol. I and AHD-MNE, 3º piso, Armário 1, Maço 366, Pr. 83, vol. II.

<sup>133</sup> 'Informação parecer do Ministério dos Negócios Estrangeiros sobre um inquérito do secretariado das Nações Unidas destinado a determinar a importância que o trabalho forçado desempenharia em Portugal (1950)', Arquivo Nacional - Torre do Tombo (henceforth ANTT), Arquivo Oliveira Salazar (hereafter AOS), CO, UL-20, ex 819, pt.5 - Trabalho Forçado, ff. 55-56

<sup>134</sup> 1941 report of the Chief curator of the Natives in Angola to the Indigenous Affairs Superior Inspection, quoted in 'Informação sobre as acusações formuladas no Conselho Económico e Social das Nações Unidas acerca do Trabalho Forçado - Inspeção Superior dos Negócios Indígenas', ANTT, AOS, CO, UL-20, ex 819, pt.5 - Trabalho Forçado, f. 65.

São Tomé and Príncipe's Chief curator reported that, if all the labourers whose contract had already finished were repatriated, it would bring serious problems to the agricultural explorations in the archipelago; nevertheless, he warned that the British consul was alert and it was necessary to proceed carefully.<sup>135</sup>

As a matter of fact, forced labour for both public and private purposes had not been eradicated in the Portuguese colonies. A report presented to the National Assembly's Colonies Committee in 1947 called attention to the cruel reality of native labour in the Portuguese African colonies. Its author was the aforementioned Henrique Galvão: he had distinguished himself in the first decade of *Estado Novo* for his involvement in colonial propaganda, being the director of the regional fairs in Luanda and Lourenço Marques (now Maputo), in 1932, and director of the Portuguese Colonial Exhibition, in 1934. He was also the Superior Inspector for Colonial Administration since 1935 and a member of parliament elected by Angola since January 1946. A keen supporter of *Estado Novo* at first, Galvão broke with Salazar's administration largely due to the inertia regarding native policies and colonial administration.<sup>136</sup> In his 1947 report, Galvão strongly criticised colonial authorities' involvement in recruiting labourers for private enterprises, supplying humans as products at request. In his opinion, this situation was 'more cruel than the one created by pure slavery': while slave owners cared for their property, the employer who 'rented the black to the State' just ordered more in case of death or incapacity to work.<sup>137</sup> Forced labour for public purposes was not better: in fact, since the State not always paid or provided food, Africans preferred to be compelled to work for private ventures.<sup>138</sup> Moreover, due to the

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<sup>135</sup> Quoted in 'Informação sobre as acusações formuladas no Conselho Económico e Social das Nações Unidas acerca do Trabalho Forçado – Inspecção Superior dos Negócios Indígenas', ANTT, AOS, CO, UL-20, cx 819, pt.5 - Trabalho Forçado, f. 73.

<sup>136</sup> On Henrique Galvão's interesting and peculiar route in Portuguese public life, see Montoito, Eugénio (2005), *Henrique Galvão: ou a dissidência de um cadete do 28 de Maio (1927-1952)*, Lisbon, Centro de História da Universidade de Lisboa, and Peres, Luis (2009), *Henrique Galvão, 1895-1970: Aspects of a Euro-African Crusade*, Pretoria, University of South Africa (Unpublished Master dissertation).

<sup>137</sup> 'Exposição do Deputado Henrique Galvão à Comissão de Colónias da Assembleia Nacional, em 22 Janeiro de 1947', Arquivo Histórico Parlamentar, Secção XXVIII, Caixa 48, n. 10, ff. 85.

<sup>138</sup> Idem, ff. 82.

labour shortage in Portuguese Africa, the recruitment did not spare women, children, the elderly or the sick: 'only the dead are really exempt from forced labor'.<sup>139</sup>

On the following year, another Galvão's report, this time sent to the Minister of Colonies, repeated the criticisms in an analysis of the native question in Mozambique. Galvão argued that forced labour was one of the main causes of the clandestine emigration of Mozambicans to the surrounding colonies. This time, Galvão suggested that the Portuguese authorities intensified their role in labour recruitment to avoid the current abuses of private recruiters.<sup>140</sup>

Moreover, forced labour recruitment in Angola for the plantations of São Tomé and Príncipe continued until being ruled out in April 1950. Forced labour in the colony did not end, though. In fact, shortage of labour in the plantations and consequent fears of forced recruitment in the islands, together with the use of forced labour for public works in order to implement an ambitious plan of urbanisation and modernisation in the archipelago, were at the origin of the killing and torture of several hundreds of Africans occurred in the island of São Tomé in February 1953, in one of the most brutal and often forgotten episodes of Portuguese late-colonialism prior to the eclosion of the colonial wars in the 1960s.<sup>141</sup>

Colonial practises, which Portugal wanted to keep secret from the United Nations Economic and Social Council in 1950 and had exhaustively denied since the early 1900s, were dissociated from ideals and principles codified in the Portuguese law on native labour. Only the latter were in accordance with the image of the Portuguese as a benevolent coloniser that was spread both internationally and domestically. Debates on native labour in the Portuguese empire were used to underline differences between

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<sup>139</sup> Idem, ff. 86.

<sup>140</sup> 'A questão indígena em Moçambique - Relatório de 30 de Janeiro de 1948', AHD-MNE, UM - Gabinete de Negócios Políticos, pt. 1619.

<sup>141</sup> On the 1953 São Tomé massacre, see Pélissier, René (1972), "'La guerre" de Batepá (São Tomé - février 1953)', *Revue française d'Études politiques africaines*, 73, pp. 74-88 and Seibert, Gerhard (1997), 'Le Massacre de Février 1953 à São Tomé. Raison d'être du nationalisme santoméen', *Lusotopie* 1997, pp. 173-192

the Portugal and other colonisers, claiming for the Portuguese the responsibility to be the first (and the only one truly engaged) coloniser concerned with the civilisation of their colonised through the encouragement of modern labour practises. In 1950 (as in 1907, in 1912, in 1925-26 or in 1930), attempts to shed light on the existence of forced labour in the Portuguese empire were degraded and considered as unfounded attacks motivated by greed and envy. These attacks to the nation's honour and the colonising capacities of the national people were construed as part of a broader foreign complot that – as we will see in the chapter two – took many forms.



## **2. THE SCRAMBLE FOR AFRICA RELOADED: PORTUGAL AND THE CLAIMS FOR COLONIES BEFORE THE SECOND WORLD WAR**

By the time António de Oliveira Salazar was sworn in as chief of the Portuguese Government on 5<sup>th</sup> July 1932, a new potential threat to the Empire caused by ‘dangerous internationalisms’ – as they were referred to in the contemporaneous parlance – had began to worry officers in both the ministry of Colonies and the ministry of Foreign Affairs. For Salazar’s knowledge, the minister of Foreign Affairs sent him a copy of an alarming opinion that his office had received from the General Secretary of the ministry, Luiz Teixeira de Sampaio. The opinion, which dated from 4<sup>th</sup> June 1932, called attention to the issue of ‘the aspirations of other colonial powers and the propaganda of the idea of internationalisation, which [appears] more or less disguised under the name of cooperation of the African territories.’<sup>1</sup> The General Secretary of the Ministry of Foreign Affairs informed that his office had already taken the initiative to recommend Portuguese embassies, consulates, and legations abroad to beware of colonial internationalisation and foreign colonial ambitions.

Nevertheless, Teixeira de Sampaio suggested to the Minister of Foreign Affairs that this warning was reinforced: all diplomatic missions should be advised to take ‘increasingly solicitous care regarding information on this matter’ so that it become clear to all of them that ‘they need to seek information by all means – and by all forms –

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<sup>1</sup> Parecer de Luiz Teixeira de Sampaio, 4<sup>th</sup> June 1932. ANTT-AOS, CO, UL-12 cx. 805, Reivindicações coloniais, pasta 1, 1<sup>a</sup> Subdivisão, f. 2.

and not only in the strictly official arena.<sup>1</sup> A small handwritten note on the top of the copy received by Salazar's office reveals that the minister of Foreign Affairs agreed with the urgency of taking such action.<sup>2</sup>

The Ministry of Colonies was also alerted. Along with the recommendation to be vigilant, it was suggested that policies were adapted to the new context in which 'the trend and propaganda of colonial internationalisation' was gathering momentum. Officers of the Ministry of Foreign Affairs showed some apprehension regarding possible 'accusations of hostility to foreigners or of impediments to the expansion of trade in the Portuguese colonies'.<sup>3</sup>

These concerns stemmed from Salazar's Colonial Act of 1930, which introduced limitations to foreign capital and people. In accordance with the terms of Colonial Act, the concession of land in coastal areas could not be made to foreigners without receiving the previous approval of the Council of Ministers in Lisbon. In African colonies, this rule applied not only to new concessions of land from the State to private concessionaires but also to private-to-private transactions.<sup>4</sup> Even though the Council of Ministers did not necessarily reject every single concession involving foreigners, these commercial transactions were not free to any further extent. Although theoretically foreign capital was not unwelcome, it had to be subordinated to 'conditions that ensure the nationalisation and other conveniences for the colony's economy' – in practice, this was translated into disincentives and impediments to its entrance.<sup>5</sup>

Furthermore, both national and foreign citizens could henceforth be prevented from entering any of the Portuguese colonies or even expelled from one where they were already settled, if their presence was considered inconvenient for domestic or international order. Under the Colonial Act provisions and the increasing statism of colonial affairs aimed by Salazar, the decision on the expulsion from a colony did not

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<sup>2</sup> Ibidem.

<sup>3</sup> Letter from the Directorate General of Political Affairs of the Ministry of Foreign Affairs to the Director General of the Colonies of the Occident, 4<sup>th</sup> December 1932, AHU, MU, DGAPC, 1029, Processo 34-A – Penetração Italiana em Angola.

<sup>4</sup> Article 10, Acto Colonial. Decree 18 570, *Diário do Governo*, 8<sup>th</sup> July 1930. From 1935, private-to-private transactions were not dependent from the central government's authorisation anymore. See Law 1 900, *Diário do Governo*, 21<sup>st</sup> May 1935.

<sup>5</sup> Article 13, Decree no. 18 570, *Diário do Governo*, 8<sup>th</sup> July 1930.

belong to judicial authorities of that colony but rather to the Council of Ministers in the metropole.<sup>6</sup> In this manner, the control of settlers in the Portuguese colonies was centralised and became clearly politicised: the measure did not target only internal opponents of the dictatorship but also curtailed the liberties of foreign citizens. In short, Colonial Act sharpened the divide between nationals and non-nationals, which the officers of the Ministry of Foreign Affairs later feared could be used against Portugal in the near future.

In fact, these same provisions had already arisen similar criticisms during the discussion of the preliminary text of Colonial Act, which was made available through the press for public discussion two months before its promulgation. During the debate at the National Colonial Congress, Alberto Nogueira de Lemos, a senior colonial civil servant with experience in Angola, praised the reasons behind the Colonial Act's specifications about concessions to foreigner citizens but alerted to the 'offending international situation' created by their formulation. He recalled that the Berlin Act of 1885 prohibited access restrictions in the Congo River basin only, not in the other colonial domains; nevertheless, Portugal had to keep in mind that there was a difference between what was explicitly forbidden and allowed by international law and what the international community was expecting based on the principles laid down by international law. For Nogueira de Lemos, the major problem was not the 'character of aversion to foreigners' of the legislation in itself but rather how it would be perceived abroad. Therefore, he suggested an easy solution: by extending the same limitations to nationals in Colonial Act, in practice, the government could restrain concessions to foreigners, if desired, without compromising Portugal's 'moral authority' on the record.<sup>7</sup>

Also Vasco Borges, Minister of Foreign Affairs on the eve of the overthrow of the First Republic, was opposed to the inclusion of limitations to foreign capital and people in a text that was aimed to replace the articles referring to the colonial empire in the Portuguese Constitution in force at the time. In an opinion article in the widely read

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<sup>6</sup> Article 4, *Ibidem*.

<sup>7</sup> Intervention of Alberto Nogueira de Lemos during the National Colonial Congress's third extraordinary session for the discussion on Colonial Act on 15<sup>th</sup> May 1930. *III Congresso Colonial Nacional. Actas das Sessões e Teses*, Lisbon, Sociedade de Geografia de Lisboa, pp. CCXXXVII-CCXXXIX

*Diário de Notícias*, he stressed that the new legislation paved the way for a ‘xenophobic nationalism’, which in his opinion was highly criticisable. In Vasco Borges’s point of view, the principles relating to non-national interests and individuals expressed the adoption of a foreign policy that could be extremely dangerous for Portugal in the current state of affairs. For the sake of nationalisation of the empire, the government was actually creating a great menace to the maintenance of colonies as parts of the nation. Caution was necessary since, in Vasco Borges’s words, ‘imperialism was afoot’: empires could be won and lost ‘around the solemn protocol tables’, as happened with the Berlin West Africa Conference almost fifty years before.<sup>8</sup>

For Vasco Borges and Nogueira de Lemos, as for the worried bureaucrats in the Ministry of Foreign Affairs, it seemed evident that the world was teetering on the brink of a new race for Africa. Above all, they shared the conviction that Portugal had many reasons to be alarmed about the introduction of any possible change to the existing partition of the African continent between European powers. This chapter will show that they were not alone in believing so. To be sure, this fear was widespread and grew gradually during the 1930s, reaching its height on the eve of the Second World War. Although the question of native labour within the League of Nations discussed in the previous chapter contributed to increased distrust and anxiety regarding the international discussion on colonies, it does not explain it alone.

Why were, thus, the Portuguese so concerned about an approaching Scramble for Africa? Did this idea of a new redistribution of African colonies have a basis in fact? In the 1930s Europe witnessed the most significant disruption in its economic life since the advent of industrialisation. In consequence, the importance of colonial economies in the quest for alternative solutions for European powers suffered changes as they were seen as potential sources to facilitate the economic reconstruction and the rebalance of metropolitan budgets. Along with the exacerbating economic tensions, democratic institutions were undermined all over Europe during this period. As Michael Mann noted, although most European states adopted constitutions enshrining legislative elections with competing political parties after the initial post-First World War turbulence, by the outbreak of the Second World War more than half of Europe’s

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<sup>8</sup> *Diário de Notícias*, 10<sup>th</sup> May 1930, p. 1 and 14<sup>th</sup> May, p. 1.

parliamentary regimes were actually right-wing dictatorships.<sup>9</sup> Across Europe, there was a radicalisation of fascist – or fascist-inspired – expansionist discourses and policies.<sup>10</sup> But did these transformations pose a real threat to the Portuguese colonial empire? Or was it a far-fetched invention from excited imagination in Portugal? Whether real or imaginary, the way these threats were perceived by the Portuguese contemporaries was the most influential factor in shaping their response to the challenges of their social and political context. In order to fully understand the Portuguese fears of a new scramble for Africa in the 1930s, it is necessary to retrace its origins back to the race for Africa in the late nineteenth-century and its impact on Portugal's colonial project.

## **2.1. Portugal and the Partition of Africa: crossing realities and fictions**

On 13<sup>th</sup> May 1884, the Ministry of Foreign Affairs sent a circular despatch to the Portuguese legations in Berlin, Brussels, The Hague, Madrid, Paris, Rome, and Vienna, instructing them to ascertain the opinion of other European powers about the planning of an international conference in order to discuss the question of the Congo River basin. José Vicente Barbosa du Bocage, the minister of Foreign Affairs at the time, could hardly imagine the outcome that would emerge from such meeting less than nine months later.<sup>11</sup> The idea of gathering an international conference had already been

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<sup>9</sup> Mann, Michael (2004), *Fascists*, Cambridge, Cambridge University Press, pp. 37-38.

<sup>10</sup> For an interesting comparative study on fascist expansionism in Fascist Italy and Nazi Germany, see Kallis, Aristotle (2000), *Fascist Ideology. Territory and expansionism in Italy and Germany, 1922-1945*, London-New York, Routledge.

<sup>11</sup> The literature dealing with the Berlin West Africa Conference and, more generally, with the partition of Africa at the end of the nineteenth century is vast. See, for instance, Förster, Stig, Wolfgang J Mommsen, and Ronald Robinson (1988) (eds.), *Bismarck, Europe, and Africa. The Berlin Africa conference 1884 - 1885 and the onset of partition*, Oxford, Oxford University Press; Pakenham, Thomas (1991), *The scramble for Africa, 1876-1912*, London, Weidenfeld

suggested by the Belgian Minister of Foreign Affairs to the Portuguese ambassador in Brussels in 1882. It began taking shape in the minister of Foreign Affairs' mind after becoming evident that the Anglo-Portuguese Treaty concerning the Congo Basin, which had been signed eleven weeks earlier, would not be ratified by the British parliament, let alone recognised by the international community. The disagreement between Portugal and Britain regarding this geographic area was an old one.<sup>12</sup>

Briefly, the Portuguese had sovereignty claims over vast areas both south and north the mouth of Congo River. These claims were predicated on the priority of discovery and colonisation of the territory: the Portuguese explorer Diogo Cão sailed up Congo River in 1483 and got into contact with the powerful Central African Kingdom of Kongo, whose king soon accepted to convert to Christianity and took the Christian name João, as the ruling Portuguese king at the time. By the second half of the nineteenth-century, the alliance had long faded away as a consequence of both the loss of influence of the Kingdom of Kongo in the region and the neglect on the Portuguese part. Nevertheless, the Kingdom of Kongo still held a powerful grip on the Portuguese imagination as evidence of the successful achievements of the civilising mission of the nation.<sup>13</sup> Although the boundaries of the Portuguese claims in the Congo region were ill-defined, Portugal's constitutional text in force since 1826 included coastal Cabinda and

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and Nicolson; Koponen, Juhani (1993), "The Partition of Africa. A Scramble for a Mirage?", *Nordic Journal of African Studies*, 2 (1), pp. 117-135. A common shortcoming is to focus on British and French rivalries, ignoring the other powers involved in the process. By countering this tendency, the work of the Dutch historian Hendrik L. Wesseling positively stands out in the state of art. Wesseling, Hendrik H. (1996), *Divide and Rule. The partition of Africa, 1880-1914*, London - Westport, Connecticut, Praeger. Also with a narrative, diplomatic-sources approach, Eric Axelson's book offers a good insight into the negotiations that involved or affected Portugal. Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, Johannesburg, Witwatersrand University Press. See also Alexandre, Valentim (1998), 'Nação e Império' in Bethencourt, Francisco e Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, vol. IV, *Do Brasil para África (1809 -1930)*, Lisbon, Círculo de Leitores, pp. 112-132; Alexandre, Valentim (2004), 'The Portuguese Empire, 1825-90. Ideology and economics' in Olivier Pétré-Grenouilleau (eds.), *From Slave Trade to Empire: European Colonisation of Black Africa, 1780s-1880s*, New York, Routledge, ch. 7, pp. 110 - 132.

<sup>12</sup> It will not be approached in depth here. For a detailed account on the Anglo-Portuguese disputes, see Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, Johannesburg, Witwatersrand University Press, ch. 3, pp. 38-63, as well as Pinto, Françoise Latour da Veiga (1972), *Le Portugal et le Congo au XIX Siècle: Étude d'histoire des relations internationales*, Paris, Presses Universitaires de France.

<sup>13</sup> See Jerónimo, Miguel Bandeira (2012), *A Diplomacia do Império. Política e Religião na partilha de África (1820-1890)*, Lisbon, Edições 70.

Malembo (which is about 100 kilometres north the Congo River's mouth) amongst the national dependencies in Africa. Hence, Portugal expected international recognition of its historical rights in the region as well.

At the end of December 1870, during the Franco-Prussian war, a German merchant ship had been captured by a French warship in Banana, the seaport in the north bank of the Congo River's mouth where King Leopold II of the Belgians would later announce the creation of the Congo Free State. The German representative in Lisbon complained that Banana was Portugal's territory and, therefore, the ship had been captured in neutral waters, asking for Portuguese intervention. His argument was accepted by the French authorities, which released the ship.<sup>14</sup> In 1876, the Netherlands requested the Portuguese government's permission to establish Dutch vice-consuls in Cabinda and Malembo.<sup>15</sup> These episodes might suggest that France, Germany, and the Netherlands assented to the Portuguese sovereignty claims in the region. However, the international recognition was far from being achieved.

The Netherlands shortly withdrew its request as a result of British pressure. Britain was strongly opposed to the Portuguese occupation of any territory north of Ambriz (i.e. about 250 kilometres south the Congo River's mouth). According to a leading Liverpool merchant, the extension of Portuguese sovereignty 'would exterminate the British Trade existing in the absorbed territory'.<sup>16</sup> The Portuguese applied high export and import duties in their dependencies and limited the circulation of non-national individuals. As the Dutch chargé d'affaires in Lisbon summarised, Portugal was dominated by a 'spirit of outrageous protectionism and the exclusion of foreigners'.<sup>17</sup> This was contrary to the policies of free-trade applied and endorsed by the British, motivating the disapproval of Portuguese claims. Yet, the situation was about to change.

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<sup>14</sup> Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, p. 41.

<sup>15</sup> Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, p. 42.

<sup>16</sup> John Holt, from Liverpool, to Foreign Secretary Lord Granville on 11<sup>th</sup> December 1882. Transcribed in Chamberlain, M. E. (1999 [1974]), *The Scramble for Africa*, Harlow, Pearson Education Lmt, Document 12b, p. 107.

<sup>17</sup> Quoted in Wesseling, Hendrik (1996), *Divide and Rule. The partition of Africa, 1880-1914*, London - Westport, Connecticut, Praeger, p. 100.

In September 1876, King Leopold II invited representatives of the major European powers – Portugal was not amongst the invitees – for the Brussels Geographic Conference, which resulted in the creation of the *Association Internationale Africaine*. Before long, the Association created the Committee for the Study of the Upper Congo (renamed International Association for the Congo in 1882) and sent an expedition in the Congo Basin led by the explorer Henry Morton Stanley. At the same time, news about the celebration of treaties between native chiefs and Savorgnan de Brazza, on behalf of France, reached Europe. In this context of invigorated interest in the region, the British attitude towards the recognition of Portuguese claims over the Congo Basin was revised. In order to forestall French penetration in the area, Britain became open to the installation of its old – and rather weak – ally in the Congo area.<sup>18</sup> Anglo-Portuguese negotiations began in November 1882 and a final treaty was signed on 26<sup>th</sup> February 1884. At the end, Britain recognised the Portuguese control of the coast at the mouth of the Congo River, up to Pointe-Noire (nowadays in Congo-Brazzaville); in return, Portugal compromised to assure the entire freedom in respect to commerce and navigation in the Congo River and its tributaries, as well as in Zambezi River in East Africa, and to keep the territory open to ‘all nations, and foreigners of all nationalities’, enjoying ‘the same benefits, advantages, and treatment, in every respect, as the subjects of Portugal’.<sup>19</sup> However, the treaty never came into force.

Neither the British nor the Portuguese public opinion were pleased with the terms of the Anglo-Portuguese treaty. Whilst in Britain the government was criticised for giving such a vast and important territory to an utterly incompetent country, in Portugal the government was criticised for signing a humiliating treaty and, consequently, imposing the loss of a huge territorial parcel that historically belonged to the Portuguese nation. While British commercial institutions had misgivings about Portugal’s capacity and willingness to put free trade and free navigation obligations into practice, Portuguese commercial institutions protested against the abolition of

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<sup>18</sup> Stengers, Jean (1969), ‘Leopold II et la rivalité franco-anglaise en Afrique, 1882-1884’, *Revue belge de philologie et d’histoire. Histoire (depuis l’Antiquité) - Geschiedenis (sedert de Oudheid)*, 47 (2), pp. 425-479.

<sup>19</sup> For the Anglo-Portuguese Treaty, see appendix A in Anstey, Roger (1962), *Britain and the Congo in the Nineteenth Century*, Oxford, Clarendon Press, pp. 241-246.

differential duties.<sup>20</sup> Internationally, the Anglo-Portuguese treaty was vehemently contested not only by France and Leopold II, which had concrete interests in the area, but also by Germany, which was about to foray into overseas imperialism.

Germany responded quickly to the 13<sup>th</sup> May 1884 circular despatch from the Portuguese Ministry of Foreign Affairs enquiring about a possible international convention for the discussion of the Congo question. Otto von Bismarck, who had placed Angra Pequena (today Lüderitz, Namibia) under Reich protection on 24<sup>th</sup> April that year, was keen to discuss Congo affairs due to the strategic importance of the region. In fact, the German chancellor had already begun talks with the French ambassador in Berlin about colonial matters in late April. The unacceptable Anglo-Portuguese treaty and the quest for an alternative solution for the Congo River Basin was amongst the issues discussed. In concert with France, Bismarck began drawing the international meeting's agenda. In a little while, he was sending invitations to Berlin in order to discuss a solution for the European competing claims in the region and, consequently, to appease growing tensions in Europe.

### **2.1.1. The Berlin West Africa Conference**

The General Act of the Conference of Berlin concerning the Congo was signed exactly one year after the Anglo-Portuguese Treaty, on 26<sup>th</sup> February 1885. Like the Anglo-Portuguese Treaty, the General Act of the Conference of Berlin established freedom of trade and navigation in the basin and mouth of the Congo, safeguarding

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<sup>20</sup> Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, p. 64; Alexandre, Valentim (1998), 'Nação e Império' in Bethencourt, Francisco e Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, vol. IV, *Do Brasil para Africa (1809 -1930)*, Lisbon, Círculo de Leitores, p. 124. See also Alexandre, Valentim (2004), 'The Portuguese Empire, 1825-90. Ideology and economics' in Olivier Pétré-Grenouilleau (eds.), *From Slave Trade to Empire: European Colonisation of Black Africa, 1780s-1880s*, New York, Routledge, ch. 7, pp. 110 – 132.

equal treatment with disregard of nationality. In relation to Portugal and the recognition of its sovereignty claims in West Africa, the result was very different from the one of the 1884 Anglo-Portuguese Treaty, though. The talks during the Berlin West Africa Conference led to the international recognition of King Leopold II and his International Association of the Congo's rights over the territories, giving rise to the Congo Free State. In its turn, Portugal was granted the south bank of the Congo and a small enclave in the north bank around Cabinda and Malembo, which did not reach the mouth of the river. The area granted by the Anglo-Portuguese Treaty had already been considered dishonouring for Portugal, let alone the solution found during the Conference of Berlin. Given the expectation of having its historic claims recognised and using rivalries between France, Britain, and Germany to Portugal's advantage, the outcome was seen as a tragedy.<sup>21</sup> The fact that, internationally, Portugal was perceived as an unfriendly power to foreigners in its African possessions and censured by its inertia in the fight against slave trade played a role in determining this outcome.<sup>22</sup> In other words, the lack of sympathy for the Portuguese claims was not oblivious to the association with slavery and hostility to non-nationals, the same association whose effects on the nation's image were still feared in the 1930s.

In addition, the General Act of the Conference of Berlin laid down the provisions for new colonial acquisitions of coastal areas, excluding existing possessions as well as possessions in the interior. It defined the principle of effective occupation 'upon the coast of the African continent': the rights over new acquired territories would not be recognised unless the claimant country was able to assure its operative authority in the field; henceforth, historical claims to territory based on prior discovery and travel

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<sup>21</sup> On the reactions to the signature of both the 1885 General Act of the Conference of Berlin and the 1884 Anglo-Portuguese treaty, see Alexandre, Valentim (1998), 'Nação e Império' in Bethencourt, Francisco e Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, vol. IV, *Do Brasil para África (1809 -1930)*, Lisbon, Círculo de Leitores, pp. 122-128

<sup>22</sup> See Hammond, Richard J. (1966), *Portugal and Africa. 1815-1910. A Study in Uneconomic Imperialism*, Stanford, Stanford University Press, pp. 91-99; Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, pp. 64-83. Alexandre, Valentim (2004), 'The Portuguese Empire, 1825-90. Ideology and economics' in Olivier Pétré-Grenouilleau (eds.), *From Slave Trade to Empire: European Colonisation of Black Africa, 1780s-1880s*, New York, Routledge, ch. 7, pp. 124-125

were ruled out.<sup>23</sup> Although this principle was later transposed to the hinterland, the Berlin West Africa Conference did not divide Africa between European powers. The delimitation of boundaries of the African colonies occurred later through the signature of an array of bilateral treaties between the powers with concrete interests in each area. In truth, the partition of Africa was not part of the agenda of the Berlin meeting unlike it is commonly asserted. This widespread belief owes much to the contemporaries. As Hendrik L. Wesseling noted, the idea that the meeting in Berlin aimed to partition Africa could be found in the newspapers of the time even before the opening ceremony.<sup>24</sup>

The following cartoon – notwithstanding its obviously simplified and exaggerated style – is a good example of the Portuguese contemporaneous view regarding the Berlin West Africa Conference. It was published in a political satire illustrated weekly owned by the well-known and inimitable Portuguese caricaturist Rafael Bordallo Pinheiro about a month before the first meeting of the Berlin Conference was held. Bordallo Pinheiro did not foresee an advantageous meeting for Portugal.

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<sup>23</sup> Articles 34<sup>o</sup> and 35<sup>o</sup>. See, for instance, ‘General Act of the Conference of Berlin Concerning the Congo’. *American Journal of International Law*, 3 (1), Supplement: Official Documents (Jan., 1909), p. 24.

<sup>24</sup> Wesseling, Hendrik (1996), *Divide and Rule. The partition of Africa, 1880-1914*, London – Westport, Connecticut, Praeger, pp. 125-126.



Figure 2.1. The Berlin West Africa Conference as envisioned by Rafael Bordallo Pinheiro in *O António Maria*, 23<sup>rd</sup> October 1884, pp. 341-342.

At the bottom, it reads ‘A penosa vai ser depennada; todos comerão da cabidela, excepto o dono da capoeira, que fica a chuchar no dedo...’, which can be roughly translated as: ‘The chicken [ingeniously, the informal expression Bordallo Pinheiro used for chicken also means ‘painful’ or ‘arduous’] will be plucked; every one will eat cabidela [a Portuguese dish made with poultry] except the owner of the hen house, who is left sucking his finger.’ (‘To suck one’s finger’ is a Portuguese colloquialism that means ‘to get nothing’).

Source: Biblioteca Nacional Digital – Biblioteca Nacional de Portugal

Elderly, emaciated Portugal, noticeably much older regarding colonial affairs than the other players, appears supported on his cane of historical rights. He was visibly too weak to prevent Savorgnan de Brazza, Otto von Bismarck, and John Bull from plucking his fowl under the watchful eye of a stereotypical French man (with beret and a little moustache) and King Leopold II of the Belgians. A few months later, as decisions regarding the Congo began to take shape and became public, Bordallo Pinheiro represented Portugal as ‘the Zulus of Europe’ [sic] or as African pygmies, addressing the inequality of European nations and subalternity of Portugal.<sup>25</sup> The racialisation of Portugal’s lesser status amongst colonial – and colonial-to-be – powers in Bordallo Pinheiro’s cartoons might have been unusual at a time Social Darwinism was spreading; yet, the realisation that the asymmetrical balance of power in Europe was dangerously being transposed into the colonial realm was not.

By codifying new procedural and legal frames of reference for colonial affairs, the international conference undermined the Portuguese colonial project in Africa as it had slowly and ambiguously started being devised after the loss of Brazil. Hereafter historical rights associated with ‘discovery’ were of little value. As an editorial article in *Jornal do Comércio* put it, the Berlin Conference consecrated the ‘negation of previous rights, offering *the strongest* the possession of territories that had already been occupied by other nations, although those have not introduced taxes or settle an army there’.<sup>26</sup> It is also interesting to note that the chicken in Bordallo Pinheiro’s afore-reproduced cartoon is labelled ‘Portuguese Africa’ rather than ‘Portuguese Congo’: in Portugal, too, it was believed – and more than ever feared – that the scope of the Berlin Conference would go beyond the Congo question and that the other European powers were actually ‘cooking up’ the partition of Africa.<sup>27</sup>

Images of the past are social constructions. Memories of an event are shaped not only by events themselves; more or less consciously, manipulations through selective

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<sup>25</sup> Both the Zulu and the pygmies cartoons can be found in *O António Maria*, 11<sup>th</sup> December 1884, p. 400 and pp. 396-397, respectively.

<sup>26</sup> *Jornal do Comércio*, 30<sup>th</sup> November 1884, p. 1. Emphasis added.

<sup>27</sup> The Portuguese language also allows the use of ‘cook’ in the sense of fabricate a plan (especially in an ingenious or dishonest way), which certainly inspired Bordallo Pinheiro’s cookery scene.

and distorting acts of remembering and forgetting shape the way the past is understood. As Paul Connerton emphasised, the perception of the past is influenced by the present context as much as the perception of the present is influenced by visions of the past.<sup>28</sup> As the time went by and Africa was effectively carved up and distributed between the European powers in a process that was unsatisfying in view of Portuguese initial ambitions, the retrospective gaze reinforced the conviction that the partition of Africa had been decided in Berlin during the West Africa Conference. Hence, by the 1930s this idea was already fully ingrained, being accepted and reproduced without questioning.

During the 1930 National Colonial Congress, the day of the signature of the General Act of the Conference of Berlin was recalled as the day Portugal had witnessed the ‘trespass of advantages that had taken centuries to be achieved through the right of discovery, conquest and colonisation’ to ‘nations eager for colonial expansion’.<sup>29</sup> References to the unfairness of what Colonel Ribeiro Villas would later describe as an ‘attack on property rights’<sup>30</sup> pervade 1930s narratives about the Berlin Conference. The outcome of the conference was ascribed to the victory of power and greedy impulses of exploitation desires over reason, four-centuries old possession rights, and civilising interests. Ribeiro Villas, who was a renown Professor at the *Escola Superior Colonial*, insisted that the Congo as it was known in the nineteenth century was a ‘whole creation of Portugal’: ‘Portuguese actions, Portuguese money, and Portuguese blood’ had ‘transformed the Savage’ in the docile people which allowed modern Europeans to make their way into what was now the Congo Free State.<sup>31</sup> In his opinion, assigning an extensive interior region to other nation than the one which ‘held its exit to the contact

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<sup>28</sup> Connerton, Paul (1989), *How Societies Remember*, Cambridge, Cambridge University Press.

<sup>29</sup> Intervention of Coronel Eduardo Ferreira Viana, a colonial administrator who shortly after would serve as interim governor of Angola, during the National Colonial Congress’s third extraordinary session for the discussion on Colonial Act on 15<sup>th</sup> May 1930. *III Congresso Colonial Nacional. Actas das Sessões e Teses*, Lisbon, Sociedade de Geografia de Lisboa, p. CCXLVIII. According to Coronel Ferreira Viana, he was paraphrasing General Alves Roçadas, former governor of Angola and Macau who served as the commanding officer of Portuguese forces in southern Angola during the First World War. However, it was not possible to locate the original quote.

<sup>30</sup> Villas, Gaspar do Couto Ribeiro (1938), *História Colonial*, Vila Nova de Famalicão, Minerva, vol. II, p. 349.

<sup>31</sup> Villas, Gaspar do Couto Ribeiro (1938), *História Colonial*, Vila Nova de Famalicão, Minerva, vol. II, p. 351.

with the Progress' through the Lobito and Beira harbours in the Atlantic and Indian Oceans, respectively, was ample proof that either the people in charge were ignorant of colonial matters or were acting in bad faith.<sup>32</sup> For the Marquis of Lavradio, for instance, it was clearly an act of bad faith, as the public interventions of Henry Morton Stanley, whose experience as an explorer of Africa granted him a position of technical consultant during the Conference, declaring that he had not found any vestige of Portuguese presence in Congo basin in the present or past made evident.<sup>33</sup>

However, the criticisms found in narratives about the Berlin West Africa Conference of this period were not only directed to Stanley, to Bismarck and 'his scornful comment when referring to the Portuguese method of digging up old stale rights'<sup>34</sup> or to the glutton for colonies of powerful European nations. Critics were quick to point the finger at the Portuguese agents involved in the process as well. If Portugal's historical rights had not prevailed over the claims of other European powers 'without any rights',<sup>35</sup> it was important to understand why was Portugal so weak that it was 'forced to accept [other's conditions] to not irritate the nations'.<sup>36</sup> What had made it unable to defend its legitimate historical rights in Africa? References to free trade and free circulation, as well as associations with slave trade, were never mentioned. Instead, according to the accounts on the past in the 1930s, the causes for Portuguese weakness were twofold. First, Portugal had just come out of a serious crisis.<sup>37</sup> The system of alternation between the two major parties that characterised the Constitutional

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<sup>32</sup> Villas, Gaspar do Couto Ribeiro (1938), *História Colonial*, Vila Nova de Famalicão, Minerva, vol. II, p. 350.

<sup>33</sup> Correia de Sá, José de Almeida (1936), *Portugal em África depois de 1851. Subsídios para a História*, Lisbon, Agência Geral das Colónias, pp. 88-89.

<sup>34</sup> Castro, Luiz Vieira (1939), 'Conferência de Berlim e os seus efeitos imediatos' in Baião, António, Hernani Cidade and Manuel Múrias (eds.), *História da Expansão Portuguesa no Mundo*, Lisbon, Editorial Ática, vol.III, p. 337.

<sup>35</sup> Villas, Gaspar do Couto Ribeiro (1938), *História Colonial*, Vila Nova de Famalicão, Minerva, vol. II, p. 351.

<sup>36</sup> Correia de Sá, José de Almeida (1936), *Portugal em África depois de 1851. Subsídios para a História*, Lisbon, Agência Geral das Colónias, p. 97.

<sup>37</sup> Castro, Luiz Vieira (1939), 'Conferência de Berlim e os seus efeitos imediatos' in Baião, António, Hernani Cidade and Manuel Múrias (eds.), *História da Expansão Portuguesa no Mundo*, Lisbon, Editorial Ática, vol.III, p. 335.

Monarchy established after the 1820 Liberal Revolution was perceived as a source of fragility. After decades in which party interests had prevailed over national interests, the national dis-unity had destroyed socio-economic structures in Portugal and weakened Portugal's position in the world. Second, notwithstanding their efforts and willingness, the Portuguese delegates to the Berlin Conference lacked preparation to deal with the colonial question along the lines of the diplomatic discussion of the time. This unpreparedness had its origin in the fact that Portugal had turned its back to the Empire in the past, neglecting the legacy received from the discoverers of Africa. Portugal had 'fell asleep shielded by the idea [that historical rights were valid] accepted by all, waking up to a different reality.'<sup>38</sup> It is crucial to construe these explanations in light of *Estado Novo*'s single-party system and its rhetoric of the so-called 'imperial mystique': the failure of Portugal in the past had been a result of two decadence factors that had been corrected since the overthrow of the democratic First Republic.

### **2.1.2. Anglo-German conventions concerning the Portuguese colonies**

The outcome of the Berlin West Africa Conference did not put an end to Portuguese hopes for a transcontinental corridor in Africa. Lost the Congo, Portugal made efforts to cope with the new diplomatic rules and focused on the so-called Rose-Coloured Map, an ambitious project of connecting West Africa Angola to East Africa Mozambique.<sup>39</sup> Both France and Germany had no objections to the Portuguese claims, having compromised not to place any obstacles to the extension of Portuguese influence

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<sup>38</sup> Villas, Gaspar do Couto Ribeiro (1938), *História Colonial*, Vila Nova de Famalicão, Minerva, vol. II, p. 351.

<sup>39</sup> Nowell, Charles E. (1982), *The Rose-Colored Map: Portugal's Attempt to Build an African Empire from the Atlantic to the Indian Ocean*, Lisbon, Junta de Investigações Científicas do Ultramar; Guimarães, Ângela (1984), *Uma Corrente do Colonialismo Português*, Lisbon, Livros Horizonte

in these territories through the signature of bilateral treaties in May and December 1886, respectively. Once again, resistance came from Portugal's oldest ally, Britain. The overlap of the Portuguese project from the Atlantic to the Indian Ocean and the British project from Cairo to Cape Town led to growing tension that culminated in early 1890. On 11<sup>th</sup> January 1890 the Portuguese government received a note from its British counterpart requesting the immediate withdrawal of 'all and any Portuguese military forces' from the Mashona and Makololo territories (later Rhodesia, nowadays Zambia and Zimbabwe) and the Shire-Nyasa region (roughly, nowadays Malawi).<sup>40</sup> Receiving disturbing news about British naval squadrons stationed in Gibraltar and Las Palmas, as well as rumours about squadrons on their way to Lourenço Marques or Quelimane (in Mozambique's central coast), the Portuguese government yielded. The episode, which became known in Portugal as the 'British Ultimatum', provoked huge protests in Portugal, which lasted several months.<sup>41</sup> Perceived as (another) theft of Portuguese rights in Africa and a national humiliation, the British *Ultimatum* was instrumentalised by the newly formed Republican party to discredit the Portuguese monarchical government, which was had betrayed Portugal's interests and disrespected the memory of the Portuguese forefathers.<sup>42</sup> Moreover, the episode bolstered feelings against Britain. The British consulate was stoned, economic sanctions against Britain were demanded, and national subscriptions were signed in order to acquire a first-class warship to face

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<sup>40</sup> A transcription of British memorandum can be found in Alexandre, Valentim (1979), *Origens do Colonialism Português Moderno (1822-1891)*, Sá da Costa Editora, Lisboa, vol. III, Document 7.1, pp. 194-195.

<sup>41</sup> On the Ultimatum, see Axelson, Eric (1967), *Portugal and the Scramble for Africa, 1875-1891*, Johannesburg, Witwatersrand University Press, ch. 11, pp. 201-231; Teixeira, Nuno Severiano (1990), *O Ultimatum Inglês. Política externa e política interna no Portugal de 1890*, Lisbon, Alfa; Homem, Amadeu de Carvalho (1992), 'O "Ultimatum" Inglês de 1890 e a opinião pública', *Revista de História das Ideias*, 14, pp. 281-296. Coelho, Maria Teresa Pinto (1996), *Apocalypse e Regeneração. O ultimatum e a mitologia da Pátria na literatura finissecular*, Lisbon, Edições Cosmos; Teixeira, Nuno Severiano (2002) 'Between Africa and Europe: Portuguese Foreign Policy, 1890-2000', in Pinto, António Costa (ed.), *Contemporary Portugal. Politics, Society and Culture*, New York, Columbia University Press, ch. 4, pp. 83-118

<sup>42</sup> On the elections of 30<sup>th</sup> March 1890, the Republican Party was able to elect three deputies to the national parliament for the first time, initiating a process of strengthening their political influence based on the capitalisation of Empire. The British Ultimatum is frequently mentioned as the first step for the overthrow of the monarchy. On the Republican political use of the *Ultimatum*, see Teixeira, Nuno Severiano (1990), *O Ultimatum Inglês. Política externa e política interna no Portugal de 1890*, op. cit.

the British.<sup>43</sup> The effects on Portuguese public opinion's perception of Britain as a non-trustworthy ally shaped imperial conceptions for the following decades. Nonetheless, diplomatically the alliance between Portugal and Britain was secretly renewed in 14<sup>th</sup> October 1899. The signature of this agreement – the Treaty of Windsor – was surrounded by interesting circumstances.

The 1899 secret alliance vows between Portugal and Britain came just over a year after the signature of an Anglo-German convention concerning the Portuguese Colonies.<sup>44</sup> As a consequence of its chronic financial weakness, Portugal needed foreign finance assistance. Britain and Germany were ready to advance the necessary money to Portugal on the security of the customs revenues of Mozambique, Angola, and the Portuguese part of the Island of Timor. According to the Anglo-German convention of 30<sup>th</sup> August 1898, while the customs revenues referring to South Mozambique and North Angola would be assigned to the British loan, the customs revenues of North Mozambique, South Angola, and Timor would be assigned to the German loan. A secret convention and a secret note followed the official text of the convention, defining the procedure to be adopted if Portugal was unable to pay back its loan and was forced to renounce to its sovereignty rights over Mozambique, Angola, and Timor. Accordingly, each nation would absorb the territories of which customs revenues were in control at

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<sup>43</sup> See Coelho, Maria Teresa Pinto (1996), *Apocalipse e Regeneração. O ultimatum e a mitologia da Pátria na literatura finissecular*, op. cit.

<sup>44</sup> The negotiations between England and Germany over the future of the Portuguese Empire have been given little attention by historians. On the Portuguese side, although it is frequently mentioned, it has been explored in length only in two pieces of work published during *Estado Novo*. Neither author was an historian: the first is authored by a lawyer and member of Parliament, Lopes, Artur Ribeiro (1933), *A Convenção Secreta entre a Alemanha e a Inglaterra sobre a partilha das Colónias Portuguesas*, Lisbon, Imprensa da Portugal-Brasil; the second book is a governmental edition authored by José de Almada, the already mentioned Ministry of Foreign Affairs' consultant for colonial affairs: Almada, José (1946), *Convenções anglo-alemãs relativas às colónias Portuguesas*, Lisbon, Edições do Estado Maior do Exército. See also Willequet, Jacques (1967), 'Anglo-German rivalry in Belgian and Portuguese Africa?' in Prosser Gifford and William Roger Louis (eds.), *Britain and Germany in Africa*, New Haven, Yale University Press, pp. 245-275, and Tschapek, Rolf Peter (2000), *Bausteine eines zukünftigen deutschen Mittelafrika. Deutscher Imperialismus und die portugiesischen Kolonien*, Stuttgart, Franz Steiner Verlag.

the time.<sup>45</sup> At the end, Portugal was able to obtain the necessary loan in France and the Anglo-German Convention was upstaged.

However, in 1912 the existence of secret negotiations between the British and German governments to revive the 1898 convention leaked to the international press.<sup>46</sup> In early January, a polemic article authored by General Von Liebert, at the time member of the German parliament, active fellow of the German Colonial Society, and former governor of German East Africa, reached Portugal through the French translation in *Le Matin*. The Lisbon daily *A Capital* translated some excerpts, according to which Von Liebert argued that it was about time German claimed the Portuguese colonies for itself in order to replace ‘the infect and corrupt dominion of the Romanic people’ with ‘the sane and tending for economic development’ dominion of Germanic people.<sup>47</sup> Outraged, the editor of *A Capital* expressed concerns about the colonial agenda of the Pan-German League, even though the Pan-German League was not equated to the German government. However, less than a month later the *Saturday Review* from London declared that the British Foreign Secretary, Sir Edward Grey, had assured the German Government that Britain would not oppose Germany’s acquisition of Angola and São Tomé and Príncipe as Portugal was about to sell the territories due to financial problems.<sup>48</sup> The rumour seemed to confirm that the Pan-German League’s colonial plan for extending power over the Portuguese empire actually translated the official German aims rather than being limited to Von Liebert’s personal ideas or the ultra-nationalism organisation to which he belonged.

In Portugal, several attempts were made to discredit the rumours. The Portuguese government assured that there was no intention of selling any colony or

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<sup>45</sup> A copy of the convention can be found amongst the British Foreign Office correspondence exchanged in 1935 for reasons that will hopefully become clear later in this chapter. The National Archives /FO 371/18820C2596/21/18.

<sup>46</sup> On the topic, see Hatton, P. (1971), ‘Harcourt and Solf: the Search for an Anglo-German Understanding through Africa, 1912-14’, *European History Review*, 1 (2), pp. 123-145; Langhorne, Richard (1973), ‘Anglo-German Negotiations Concerning the Future of the Portuguese Colonies, 1911-1914’, *The Historical Journal*, 16 (2), pp. 361-387. Tschapek, Rolf Peter (2000), *Bausteine eines zukünftigen deutschen Mittelafrika. Deutscher Imperialismus und die portugiesischen Kolonien*, Stuttgart, Franz Steiner Verlag.

<sup>47</sup> *A Capital*, 9<sup>th</sup> January 1912, p. 1.

<sup>48</sup> *Saturday Review*, 2nd February 1912.

raising a loan upon the guarantee of the colonies, remembering the centenarian treaties celebrated with Britain protected both continental Portugal and its colonies and thus the colonial empire was safeguarded from foreign ambitions.<sup>49</sup> The doubt if Britain would honour the treaties remained until Sir Edward Grey, the British Secretary of State for Foreign Affairs at the time, allowed the Portuguese Government to make a statement in the Parliament assuring that Great Britain and Germany had no treaty that could compromise the interests or the independence of Portugal or any part of its dominions.<sup>50</sup> The statement was later reproduced in the press. Nevertheless, the suspicion did not fade. For the Portuguese public opinion, two aspects had become clear: Germany was eager to annex the Portuguese colonies and Britain had once again betrayed Portuguese trust.

By the 1930s it was already known that the rumours regarding the 1912 Anglo-German convention were not ‘fantasies of foreign newspapers’, as it had been claimed at the time.<sup>51</sup> The so-called ‘Lichnowsky Memorandum’, authored by the German ambassador in London at the time of the outbreak of the First World War, had gained high international visibility from 1918. Amongst other revelations, it became openly known that the signature of an Anglo-German convention on the eve of the conflict was a reality. Taking into account the recent establishment of the Republic and political instability caused by the division of the Republican Party in different factions in the aftermath of the revolution, it was expected that Portugal would require financial assistance once again. In his account of his London mission in 1912-1914, Prince von Lichnowsky reported that the negotiations for the revival of the 1898 treaty was already began before his arrival in Britain. According to Lichnowsky, the British Government

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<sup>49</sup> See the intervention of the Minister of Foreign Affairs, Augusto de Vasconcelos, at the Portuguese Parliament, *Diário do Senado*, Sessão nº 25, 18<sup>th</sup> January 1912, pp. 3-4.

<sup>50</sup> In fact, the minister of Foreign Affairs’ statement in the Parliament on 15<sup>th</sup> March 1912 is a mere translation of the formula telegraphed from Grey’s office and received in Lisbon a few days before. *Diário da Câmara dos Deputados*, 15<sup>th</sup> March 1912. See also, Sir Arthur Hardinge to Sir Edward Grey, Despatches N. 38 (15<sup>th</sup> March 1912) and N. 39 (16<sup>th</sup> March 1916), in Kenneth Borne and D. Cameron Watt (eds), *British Documents on Foreign Affairs: Reports and Papers from the Foreign Office Confidential Print*, Part I. From the Mid-Century to the First War, Series F. Europe, 1838-1914, Volume 30: Portugal, 1907-1914, University Publications of America, pp. 315-319.

<sup>51</sup> *O Século*, 7<sup>th</sup> February 1912, p. 1

had shown ‘the greatest consideration for our interests and wishes’. He recounted that he has been told that Britain didn’t ‘want to grudge Germany her colonial development.’<sup>52</sup>

Furthermore, the publication of the first volume of Admiral von Tirpitz’s *Politische Dokumente* in 1924, from which *The Times* selected and translated excerpts about meetings with British diplomats before the First World War, corroborated von Lichnowsky’s statements. According to Tirpitz’s notes quoted in *The Times*, the British Lord Chancellor, Richard Haldane, had promised Germany ‘the whole Angola’ during a conversation which took place on 9<sup>th</sup> February 1912 in Berlin.<sup>53</sup> It could also be read that ‘the delicate negotiations for an Anglo-German agreement were in full swing, on the basis of compensating Germany with colonial possessions in Africa, to be acquired from Portugal.’<sup>54</sup> These statements did not go unnoticed within Portugal’s intellectual and political elites, who were used to read the British newspaper, and the issue was discussed in the Portuguese parliament.<sup>55</sup> At the time, it seemed remarkable that Britain had been willing to negotiate with Germany to appease frictions in the European scene, even if its oldest ally had to be sacrificed for the benefit of its imminent enemy.

Lichnowsky’s and Tirpitz’s testimonies did not fade from the Portuguese collective memory – or, to be more exact, from the memory of the political agents and opinion makers who had the means to recall them and revive the fear that Germany and Britain had a record of negotiations concerning the Portuguese empire. Therefore, after the signature of the Locarno Treaties in 1925 it was speculated if Germany’s admission to the League of Nations had been negotiated at the expenses of the Portuguese colonies, offered as mandates after Portugal was expropriated.<sup>56</sup>

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<sup>52</sup> Lichnowsky, Karl Max, Fürst von (1918), *My mission to London, 1912-1914*, London, Cassel and Company Lmt, p. 18. For the entire section on the colonial treaty regarding the Portuguese colonies, see pp. 14-19.

<sup>53</sup> *The Times*, 28<sup>th</sup> October 1924, p. 18. In fact, in the new Anglo-German convention, which was signed on 20<sup>th</sup> October 1913, Britain would get a small portion of Angolan hinterland next to Rhodesia. Timor would be assigned to Britain this time but São Tomé and Príncipe would be assigned to Germany. See The National Archives, FO 371/18820C2596/21/18.

<sup>54</sup> *The Times*, 28<sup>th</sup> October 1924, p. 9.

<sup>55</sup> Diário da Câmara dos Deputados, 17<sup>th</sup> November 1924.

<sup>56</sup> See *A Capital*, 4<sup>th</sup> December 1924, p. 1.

In addition, the posthumous publication of the *Memoirs of Prince von Bülow* (and its fast translation into French, Castilian, and English, which significantly increased its readership in Portugal) revived the topic once again in 1931. Bülow had been appointed as Secretary of State for Foreign Affairs of the German Empire in 1897, being in office at the time of the first Anglo-German convention concerning the Portuguese colonies. The first volume of his memoirs, which was focused on the first years in the government, briefly mentioned his efforts regarding the 1898 Anglo-German convention and the subsequent treaty between Great Britain and its client ‘little Portugal’. It did not contain any revelation regarding the 1898 convention which could cause surprise in Portugal; what caused stir were Bulöw’s ‘shocking’ remarks on the pre-war negotiations. The translation of an outstanding excerpt of Prince von Bülow’s words could be found in the Portuguese daily *A Voz*:

If not for the war, the Anglo-German treaty of 1898 – a good grain of seed which I planted – would have born fruit . The time came when the House of Coburg-Braganza, which is a close relative of the Royal House of England, no long reigned in Lisbon and the elegant Marquis of Soreval, a King Edward’s close friend, no longer represented Portugal in London (...). Then Britain was not interested in Portugal anymore.

*The agreement of 1898 was about to be revived when the crisis born of the ultimatum to Serbia annihilated this hope for the future along with many other good things.*<sup>57</sup>

This long quotation of Bulöw’s memoirs, which the editor of *A Voz* thought was critical to share with its readers so that the Portuguese could have a real perception of how European diplomacy worked, brought to mind that Portugal was the weakest link of the European geopolitical chain. It recalled not only the German persistent desire to take control of the Portuguese colonies but also that Britain would not do anything to

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<sup>57</sup> ‘Sem a Guerra, esse tratado germano-inglês de 1898, cujo bom grão eu semeara, ter-nos-ia dado bela colheita. Quando a casa de Coburgo-Bragança, parente próximo da casa real de Inglaterra deixou de reinar em Lisboa e quando o intimo do Rei Eduino, o elegante Marquês de Soreval, deixou de representar Portugal em Londres (...), a Inglaterra não se interessou mais por Portugal. O acordo de 1898 ia ser posto de novo em vigor, quando a crise nascida do ultimatum à Servia aniquilou, com muitas outras coisas preciosas, essa esperança de futuro.’, *A Voz*, 5<sup>th</sup> March 1931, p.1. Emphasis in the original.

avoid it despite the friendship treaties celebrated with Portugal. Taking into account the British inconsistent position towards Portugal in the past, it could be concluded from the excerpt of Bulöw's memoirs, as well as from the previous confirmations in Lichnowsky's and Tirpitz's accounts, that the envied Portuguese colonial empire was not out of harm whilst facing a context of escalating tensions amongst nations; instead, it seemed that the Portuguese colonial empire was the first thing to be put on negotiation by the greater European powers as a reliever of their frictions and hostilities. And European tensions were escalating at the moment.

## **2.2. 'Everybody wants colonies': demands, plans, and rumours in the 1930s**

On 18<sup>th</sup> May 1934, *Il Popolo d'Italia*, the official newspaper of the Italian National Fascist Party, published an alarming article that Benito Mussolini had originally written for Universal Service, an American news agency sympathetic of *Il Duce* and his ideas. It was enlightening titled *Verso il riarmo* ('Towards Rearmament').<sup>58</sup> Mussolini argued that the League of Nations had lost its importance and prestige, being unable to protect world peace and avoid a Second World War in a near future. He complained that Italian efforts to build a bridge between France and Germany had been fruitless as both nations refused to demobilise troops and disarm. The only hope to avoid the impending disaster would be if Britain came up with a last imaginative plan to satisfy the needs and claims of all the European intervenients. But the Italian dictator had little hopes that even a country as prestigious as Britain would be able to successfully appease the current tensions and create a new Concert of Europe. Hence, it was clear for him that Europe's destiny was dangerously on the brink again.

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<sup>58</sup> Reprinted in *Scritti e Discorsi Di Benito Mussolini*, vol. IX, *Scritti e discorsi dal Gennaio 1934 al 4 Novembre 1935 (XII-XIV E.F.)*, Milan, Ulrico Hoepli Editore, pp. 53-57.

Mussolini's conclusion hardly came as a surprise for its contemporaries in 1934. With Poland's invasion of Vilnius in 1921 and the Italo-Greek incident over Corfu in 1923, the League of Nations' fragility regarding the prevention of future armed conflicts had already been exposed. The incapacity to find solutions for the controversies afflicting Europe at the time within the League of Nations was evident. Tensions amongst nations were growing and alternative solutions to appease them were necessary. One of these alternative solutions was the Four-Power Pact, architected by Mussolini in 1933. Mussolini defended the collaboration of Britain, France, Germany, and Italy to find solutions between them instead of relying on the League of Nations and the ongoing Conference for the Reduction and Limitation of Armaments. Although Mussolini's idea was initially well received and supported by the Britain government, the Four-Power Pact failed, as did the Disarmament Conference on the following year.

By the time the Pact was signed in Palazzo Venezia on 15<sup>th</sup> July 1933, Mussolini's initial project had been reduced to an indecisive declaration of good intents with little practical application due to multiple cessions to the other powers.<sup>59</sup> Furthermore, the French Parliament did not ratify it. Therefore, the Four-Power Pact never came into force. Nevertheless, its effects were immediately felt in Portugal as the first meetings for the signature of the Four-Power Pact began.

### **2.2.1. Echoes from Paris and Rome**

The initial conversations between Benito Mussolini and the British Premier Ramsay MacDonald for the creation of the Four-Power Pact took place on the weekend of 18<sup>th</sup> and 19<sup>th</sup> March 1933. On the following morning, Ramsay MacDonald requested

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<sup>59</sup> See Mussolini, Benito (1934 [1933]), 'Il Patto a Quattro' in *Scritti e Discorsi Di Benito Mussolini*, vol. VIII, *Scritti e discorsi dal 1932-X-XI al 1933-XI-XII E.F.*, Milano, Ulrico Hoepli Editore, pp. 197-211. Burgwyn, H. James (1997), *Italian Foreign Policy in the Interwar period, 1918-1940*, Westport, Praeger Publishers, pp. 80-85.

the press not to add to or subtract anything from the official communiqué.<sup>60</sup> The communiqué made no point on the contours of the discussion between the two leaders but later that week *L'Écho de Paris* claimed to have further information regarding what had been talked between the two men. On 23<sup>rd</sup> March 1933, this French daily reported that Mussolini had proposed to MacDonald that the Portuguese colonies were divided between Germany and Italy. The article also recalled that Britain had celebrated treaties with Germany about Portugal's colonial territories more than once in the past. In addition, it stated that, even though the topic of colonial redistribution had been effaced from the text initially proposed by Mussolini due to the pressure of the British Foreign Secretary Sir John Simon, Angola, Mozambique, Timor, and Macao were the current targets of Italian and German colonial ambitions.<sup>61</sup>

Italian colonial ambitions had been revived during the First World War. Italy's entry into the war on the side of the Entente powers had been negotiated in London on 26<sup>th</sup> April 1915. The terms of the agreement were extremely advantageous for Italy. Anticipating the disintegration of the Austro-Hungarian and Ottoman empires, it was agreed that under a future Treaty of Peace, Italy should obtain Trentino, Cisalpine Tyrol, Trieste, Gorizia and Gradisca, Istria and surroundings islands, the province of Dalmatia and also a 'just share of the Mediterranean region adjacent to the province of Adalia', in the event of total or partial partition of Turkey. Moreover, it was determined that in the event of France and Great Britain increasing their colonial territories in Africa at the expense of Germany, Italy could require some equitable compensation, particularly regarding the establishment of the frontiers of the Italian colonies of Eritrea, Somaliland, and Libya with the neighbouring French and British colonies.<sup>62</sup> Fuelled by the provisions of the 1915 Treaty of London, Gaspare Colosimo, the Italian minister of Colonies between 1916 and 1919, drew a list of claims to be presented at the Paris Conference of Peace: amongst these claims, it was included the cession of French Somaliland by France, the cession of British Somaliland and Jubaland by Britain, as well as the abolition of the 1906 tripartite convention on Ethiopia and the recognition of Italy's sole

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<sup>60</sup> *The Brisbane Courier*, 21<sup>st</sup> March 1933, p. 11.

<sup>61</sup> *L'Écho de Paris*, 23<sup>rd</sup> March 1933, p. 1 and p. 3.

<sup>62</sup> Agreement Between France, Russia, Great Britain and Italy. Parliamentary Papers, London, 1920, LI Cmd. 671, Miscellaneous No. 7, p. 6.

influence in this territory.<sup>63</sup> Italy did win most of the territories that had been promised in the Treaty of London but its aspirations in Africa were dashed. None of the demands in Africa presented at the peace conference were satisfied. Italian public opinion was deeply dissatisfied with the 1919 Treaty of Versailles. The idea of a ‘mutilated victory’, a phrase attributed to poet Gabriele D’Annunzio, became central to nationalist rhetoric. Italy had been humiliated, deprived of important resources and confined to a territory that was considered insufficient for its growing population. In this context, Mussolini rose to power in 1922 with the promise to restore Italy’s former might and glory of the Roman Empire times and the desire to become a colonial power in the Mediterranean on a par with Britain and France.<sup>64</sup>

The project to expand Italian colonial empire and convert the Mediterranean Sea into a ‘Roman Sea’ motivated the intensification of colonial propaganda. Therefore, the Italian Colonial Institute (*Istituto Coloniale Italiano*) was reformulated and gave rise to the Fascist Colonial Institute (*Istituto Coloniale Fascista*) in 1928. On the previous year, the Institute had begun the publication of its monthly journal *L’Oltremare*, a publication that the Portuguese legation in Rome read with apprehension. From 1931, several articles on the Portuguese colonies appeared in the Italian official colonial propaganda journal, as well as some in other publications such as *Le Forze Armate* (a newspaper focused on military culture) and *L’Azione Coloniale* (a private owned colonial propaganda magazine). The content of these articles was similar. In a nutshell: Portugal had an immense colonial empire and especially Angola was a land full of essential raw materials and opportunities for European emigration; however, Portugal

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<sup>63</sup> On the negotiations in the Paris Peace Conference and its post-war perceptions in Italy, see H. James Burgwyn (1993), *The Legend of the Mutilated Victory. Italy, the Great War, and the Paris Peace Conference, 1915-1919*, Westport, Connecticut, Greenwood Press. See also Kallis, Aristotle (2000), *Fascist Ideology. Territory and expansionism in Italy and Germany, 1922-1945*, London-New York, Routledge, p. 22 and ff.

<sup>64</sup> Robertson, Esmonde M. (1977), *Mussolini as Empire-Builder: Europe and Africa, 1932-36*, London, Macmillan; Atkinson, David (1995), ‘Geopolitics, cartography and geographical knowledge: envisioning Africa from Fascist Italy’ in Morag Bell, Robin Butlin, and Michael Heffernan (eds.), *Geography and imperialism, 1820-1940*, Manchester, Manchester University Press, ch. 10, pp. 265-297; Labanca, Nicola (2002), *Oltremare: storia dell’espansione coloniale italiana*, Bologna, Il Mulino; Labanca, Nicola (2003), ‘Studies and Research on Fascist Colonialism, 1922-1935: Reflections on the State of Art’ in Palumbo, Patrizia (ed.), *A Place in the Sun. Africa in Italian Colonial Culture From Post-unification to the Present*, Berkeley – Los Angeles, University of California Press, pp. 37-61

did not have the necessary capital or people to fulfil its role as a colonising nation and, as a consequence, its colonies were derelict. The agricultural, commercial, and industrial development of these naturally rich territories was far from being achieved. From this perspective, the Portuguese colonies in Africa were almost un-colonised territories. They were promoted as empty lands, disregarding not only the presence of colonised populations (as usual in colonial discourse) but also of the colonisers in power. Either implicitly or in a more explicit way, what this representation of Portuguese colonialism called attention to was that Italy, which was in need of raw materials and a new outlet for its surplus population, had a much smaller empire, despite having the necessary capital and people. Existing colonial allocation was, thus, unfair and should not be considered definitive as the economic and political context of European nations was changing, creating different needs. Furthermore, it was argued that the Portuguese government was not willing to welcome the establishment of settlers of foreign nationality or to facilitate foreign commercial ventures in its colonies to respond to the new international requirements.<sup>65</sup>

On its turn, colonial propaganda in Germany was yet to be organised and centralised by the time *L'Écho de Paris* reported the supposed Italian and German colonial ambitions regarding the Portuguese colonies in March 1933. The German Colonial League (*Reichskolonialbund*) would be founded only later that year through the fusion of the existent colonial associations. Nonetheless, these smaller pro-colonial organisations had been very active. As determined by the Article 119 of the Treaty of Versailles, Germany had renounced all its rights and titles over its overseas possessions in favour of the Principal Allied and Associated Powers. Contestation regarding the loss of colonial rights in Africa and the Pacific had been vigorous from the very first moment. The dissatisfaction with the existent distribution of colonies was thus even stronger than in Italy and the return of Germany's colonies had been persistently discussed. Former colonial elites tried to rehabilitate the image of German colonialism and prove the superiority of national colonisers when comparing with the mandated powers. Heinrich Schnee, the last governor of German East Africa, became the leading

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<sup>65</sup> The Directorate General of Political Affairs of the Ministry of Foreign Affairs sent translations or summaries of such articles, which had been collected by the Portuguese legation in Rome, to the Ministry of Colonies in 1931 and 1932. They can be found in AHU, MU, DGAPC/1H/1029/ Processo 34-A - Penetração Italiana em Angola.

voice of this revisionist movement, campaigning against the ‘great and indefensible wrong [that] has been committed against the German people in robbing them of their colonial possessions’.<sup>66</sup>

Not surprisingly, the annulment of the 1919 peace treaty and the demand for colonies ‘to feed our People and settle our excess population’ were amongst the first three points of the programme of the Nazi Party. On a special issue on German and Italian colonial claims published by the Italian Fascist magazine *Antieuropa* – which reached the Portuguese readers shortly after the initial conversations for the creation of the Four-Power Pact took place through the transcription of some excerpts in *Portugal Colonial*, the colonial propaganda magazine directed by Henrique Galvão –, an article authored by Major Walter Wülfing<sup>67</sup> stated that Hitler had managed to bring together national forces around him, anticipating he would succeed in restoring Germany’s colonial status.<sup>68</sup> It was, another article in the same issue of the Italian magazine added, ‘absurd that Africa was divided between nations which are too weak to valorise their possessions, [and] are unable to colonise them’ so Germany and Italy would justly initiate efforts to ‘open a breach in the greedy and envious mentality of the colonial nations’ in order to get a place in the sun.<sup>69</sup> The author of this second article was Carl Wilhelm Heinrich Koch, who, after having fought in the Cameroons, had lived in Angola from 1924 to 1930 as a farmer, raising questions about which were the ‘too weak nations’ he referred to.

In Portugal, *L’Écho de Paris*’s rumours about Mussolini’s suggestion about the partition of Portuguese colonies between Italy and Germany caused great outrage. The press release issued by the Portuguese government stating that the Italian dictator had

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<sup>66</sup> Schnee, Heinrich (1926), *German Colonization. Past and Future. The Truth about the German Colonies*, London, George Allen & Unwin Ltd, p.174. The German edition dates from 1924. On German colonial revisionism in the interwar period, see Schmökel, Wolfe W. (1964), *Dream of Empire. German Colonialism, 1919-1945*, New Haven, Yale University Press. See also Conrad, Sebastian (2012), *German Colonialism. A Short Story*, Cambridge, Cambridge University Press, pp. 187-194.

<sup>67</sup> A misspelling of Walther Wülfing, military of the colonial troops in German South-West Africa turned writer and colonial revisionist after 1919.

<sup>68</sup> ‘Reivindicações coloniais italianas e alemãs’, *Portugal Colonial*, 30 (August 1933), p. 12.

<sup>69</sup> Idem, pp. 12-13

personally denied any allusion to that effect was unable to pacify public opinion.<sup>70</sup> On the following day a group of representatives from the Portuguese Blue Shirts (*Camisas Azuis*, from the fascist organisation National Syndicalist Movement) headed to the British embassy, handing a message to the ambassador asking for a confirmation that Britain would continue supporting the integrity of the Portuguese colonies in accordance with the treaties celebrated between the two nations.<sup>71</sup> They left with the assurance that the Portuguese government had already been formally informed that the rumours had not the least foundation and an official press release concerning the British refutation of the news advanced by *L'Écho de Paris* was issued on the following day.<sup>72</sup>

Meanwhile, the topic had been receiving great attention from the press, which explored the indignation in its editorials and gave voice to prominent colonialists' considerations about the rumours. The 'proposed assault' or 'spoliatory sharing'<sup>73</sup> reported by *L'Écho de Paris* was unanimously repelled and branded a serious affront to Portuguese patriotism. It was emphasised that, if real, a partition of Portuguese Africa would be illicit. As the professor at the Colonial School and Colonel Lourenço Cayolla put it, the Portuguese should not be excessively concerned with the rumours because 'theft has always been considered a crime, both by civil law and by international law'.<sup>74</sup>

Despite extremely outraged, no one seemed surprised that such rumours had arisen in the French press, though. On the contrary, they were viewed as expectable. Paradoxically, Portugal was the victim of speculations because it was a small nation amongst greater powers in Europe but these same rumours only appeared because of Portugal's privileged status in the world. In this sense, the episode was used as a reminder of Portuguese exceptionality. Portugal had, in fact, many reasons to be envied in Europe. Portugal was in possession of huge and rich soils and valuable ports but that

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<sup>70</sup> The press release was published on 26<sup>th</sup> March 1933. Consulted on *Diário de Notícias*, p. 1.

<sup>71</sup> *The Times*, 29<sup>th</sup> March 1933, p. 13.

<sup>72</sup> Consulted on *Diário de Notícias*, 28<sup>th</sup> March 1933, p. 1.

<sup>73</sup> Such expressions were used in editorial articles in *Jornal do Comércio e das Colónias*, 27<sup>th</sup> March 1933, p. 1, and *O Século*, 30<sup>th</sup> March 1933, p. 1, respectively.

<sup>74</sup> Cayolla, Lourenço (1933), 'Crónica Colonial', *Boletim da Agência Geral das Colónias*, 94 (April 1933), p. 80.

was the result of hard work, not of anyone's favour.<sup>75</sup> When Portugal was working hard to 'discover, conquer, occupy, pacify, and civilise not only what is left from the ancient domains but also much of what is today in the possession of many [countries]', the nations that were now coveting the Portuguese colonies did not exist yet.<sup>76</sup> In the words of Brigadier João de Almeida, the other colonial powers had 'discovered colonies quietly in the offices of [their] chancelleries';<sup>77</sup> in its turn, Portugal had heroically discovered its colonies through the collective effort of its adventurous and fearless people. Here was a crucial point of differentiation.

Narratives concerning the emerge of rumours about the partition of Portuguese Africa emphasised the divide between Portugal, a nation of doers with an empire 'from below', and the other colonial powers, nations of opportunists of the others previous effort with an empire resulting from high diplomacy. The relation between people, nation, and empire was, thus, intrinsically different. Due to the long colonial tradition, the Empire was entrenched in the Portuguese minds and characters. Being colonial ran in the Portuguese people's blood, the same blood that other nations would have to shed if any attempt to deprive Portugal from its colonies or part of its colonies was put into practice.<sup>78</sup> In view of this visceral relation between he Portuguese and their colonies, the empire could not be separated from the Nation. It was part of it, not only historically but also at heart. The general indignation regarding *L'Écho de Paris*'s news was read as evidence of the embedment of this idea in national consciousness. Therefore,

The world must finally be convinced that it is utterly useless to forge tales of partition [of the Portuguese Colonial Empire] (...) and discuss it as if it could serve as checks and balances for [the world's] tranquillity. What is ours is ours;

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<sup>75</sup> *Diário de Notícias*, 29<sup>th</sup> March 1933, p. 1.

<sup>76</sup> *O Século*, 30<sup>th</sup> March 1933, p. 1.

<sup>77</sup> *Diário de Notícias*, 29<sup>th</sup> March 1933, p. 1.

<sup>78</sup> See, for instance, Lourenço Cayolla's article in *Diário de Notícias*, 31<sup>st</sup> March 1933, p. 1, or *Diário de Notícias*, 29<sup>th</sup> March 1933, p. 1.

and it will remain ours whilst the name of this small Great Nation called Portugal nobly appears in the map of Europe!<sup>79</sup>

However, ‘tales’ about the partition of the Portuguese Colonial Empire for the sake of European peacekeeping did re-emerge in the following years as colonial demands intensified. In October 1935 Italian troops invaded Ethiopia. Although the Wal Wal incident between Ethiopian and Italian troops was invoked as the immediate cause of the invasion and the conflict was presented as a war between two nations rather than a colonial war of conquest, the operational plans for the annexation of Ethiopia in order to increase Italian colonial empire in East Africa had started being carefully drawn in 1932.<sup>80</sup> Seven months later Mussolini announced from the balcony of Palazzo Venezia that the war was over and Ethiopia was Italian.

The failure to prevent Italian occupation of Ethiopia showed the League of Nations’ incapacity to refrain colonial grievances. Furthermore, Italian occupation of Ethiopia suggested the established boundaries in Africa were not a fixed, which was encouraging to other claimers for overseas territories. Poland was amongst them.

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<sup>79</sup> ‘o Mundo deve finalmente convencer-se da absoluta inutilidade de forjar em volta dele lendas de desagregação (...) e de o discutir como se ele pudesse servir de peso ou contrapeso para o equilíbrio da sua tranquilidade. O que é nosso é nosso, e nosso se conservará enquanto no mapa da Europa figurar, nobremente, o nome da Pequena-Grande Nação que se chama Portugal! *Jornal do Comércio e das Colónias*, 27<sup>th</sup> March 1933, p. 1. The words are from António de Eça de Queiroz, who would later be sub-director of the Secretariat for National Propaganda, becoming an influential figures in the control of the Press. In March 1933, he was editor of *Jornal do Comércio e das Colónias* and had been supporting the dictatorship since the 1926 coup d’état, in which he took part.

<sup>80</sup> Robertson, Esmonde M. (1977), *Mussolini as Empire-Builder: Europe and Africa, 1932-36*, London, Macmillan, pp. 28-34 and pp. 93-113; Labanca, Nicola (2002), *Oltremare: storia dell’espansione coloniale italiana*, Bologna, Il Mulino, pp. 186-193.

### 2.2.2. An unexpected colonial aspirant: a Polish peril in Angola?

The Maritime and Colonial League (*Liga Morska i Kolonialna*), which had been created in 1930 and began an intense propaganda of the idea of Poland as colonial power, seized the opportunity created by Italian colonial expansion. As Taras Hunczak observed, the parallels between Poland and Italy were stressed in the Maritime and Colonial League's periodical, *Morza* (The Sea): the Poles, like the Italians, were facing a problem to accommodate their large and increasing population; the Poles, like the Italians, had the right to access markets and land which were then monopolised by the Great powers; the Poles, like the Italians, had the right to live up to their geopolitical position.<sup>81</sup> Yet, Poland's government, unlike Italy's, aimed a diplomatic solution for its colonial problem rather than a military one.

During the League of Nations' autumn session in September 1936, Polish representatives presented a request for membership of the Permanent Mandates Commission and formalised a demand for a solution for its over-population, particularly for its numerous Jewish population, and also for access to raw materials. Although Colonel Józef Beck, the Polish minister of Foreign Affairs at the time, would later argue he tried as much as possible to avoid involving Poland in 'the dangerous game of colonial ambitions',<sup>82</sup> Poland was trying to pressure the League of Nations to reshuffle colonial mandates and rethink the distribution of the colonies. The Polish proposal consisted in the creation of a chartered company with extended privileges and autonomy to be administered by the Polish state – that is to say, it consisted in the creation of a colony without labelling it 'colony'.

Before the Polish Senate, Colonel Beck justified that emigration and acquisition of raw materials were two vital elements for Poland's existence, claiming that the time to begin an international exchange of views and to try to reach an international

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<sup>81</sup> See Hunczak, Taras (1967), 'Polish Colonial Ambitions in the Inter-War Period', *Slavic Review*, 26 (4), pp. 648-656.

<sup>82</sup> Beck, Jozef (1957), *Final Report*, New York, Robert Speller & Sons, pp. 132-133. The original Polish text was dictated by Colonel Beck in March 1943.

understanding for the settlement of the economic problems faced by European nations.<sup>83</sup> Polish claims were not taken seriously abroad, though. Shortly before the outbreak of the Second World War, British Foreign Secretary Lord Halifax, for instance, categorically refused to discuss Polish colonial demands with Colonel Beck: ‘there is no colonial question between the United Kingdom and Poland, there is, so far as I know, nothing to discuss’, he stated in a telegram to the British ambassador in Warsaw, Howard Kennard, in March 1939.<sup>84</sup> But in Portugal and in the Portuguese empire, Polish colonial ambitions were regarded with some concern, though.

First, Polish population in Angola began growing exponentially in 1930. This increase was related to the fact that the Colonial Pioneers Association (*Związek Pionierów Kolonialnych*), which was later absorbed by the Maritime and Colonial League, had initiated efforts for the settlement of Polish people in Angola in 1928.<sup>85</sup> On 8<sup>th</sup> November 1930, the Angolan newspaper *O Lobito* reported that 1000 Polish settlers would arrive within a few months in order to establish themselves in Huambo area as farmers.<sup>86</sup> According to information latter obtained in Angola from a Polish settler, this surge of migration to the Portuguese colony was a result of a concerted effort of propaganda – by private initiative and governmentally supported – of Angolan natural riches in Poland.<sup>87</sup> Second, the Polish interest in Angola had also become evident in July

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<sup>83</sup> The correspondent of *The Times* in Warsaw translated excerpts of Beck’s intervention, which were published on 21<sup>st</sup> December 1936, p. 11.

<sup>84</sup> Lord Halifax to Howard Kennard, 8<sup>th</sup> March 1939, Woodward, E.L. and Rohan Butler (eds.) (1951), *Documents on British Foreign Policy, 1919-39*, Third Series, vol. IV, London, HMSO, p. 205.

<sup>85</sup> Polish colonial plans in Portuguese Africa were approached in article authored by Michał Jarnecki. Unfortunately, the article is in Polish and only the title and a short abstract are translated into English. Jarnecki, Michał (2010), ‘Fantastyka polityczna czy konieczność. Portugalska Afryka, Nikaragua, Boliwia i Ekwador w polskich planach kolonialnych’ (Political fantasy or necessity? Polish colonial plans in Portuguese Africa, Nicaragua, Bolivia and Ecuador), *Sprawy Narodowościowe*, 36, pp. 93-105.

<sup>86</sup> *O Lobito*, 8<sup>th</sup> November 1930, p.1.

<sup>87</sup> Although the information had been obtained by the chief of *posto* (the lowest level of the colonial administrative division) in Quipeo, Huambo, from an intoxicated Polish settler, dates and names match the ones mentioned by Michał Jarnecki in his aforementioned article. For the report, see copy of the letter from the Angolan Governor colónias, Eduardo Ferreira Viana, to the Minister of Colonies on the 26<sup>th</sup> January 1933, AHU, MU, DGAPC/1H/1029/ Processo 34-A – Penetração Polaca em Angola.

1936 when officers of the Polish Ministry Foreign Affairs approached the Portuguese legate in Warsaw, César de Sousa Mendes, to assess Portugal's willingness to accept the establishment of a Jewish territory within Angola's borders.<sup>88</sup> In fact, the idea for the creation of a Jewish territory in Angola was not unprecedented: projects in this direction emerged in 1886 and in 1912 coordinated by the Alliance Israelite Universelle and the Jewish Territorial Organisation (ITO) respectively. At the time, they had been discussed in Portugal as a defensive strategy of occupation to thwart greater powers' ambitions over the Portuguese possessions: although the latter was unanimously approved by the Chamber of Deputies, both projects were abandoned.<sup>89</sup> The revival of the 'Angolan Zion' idea displeased César de Sousa Mendes – actually, he had been repeatedly calling attention to the perils of the immigration of Polish Jewish people to Portugal since 1934. In his perspective, they could cause social disruption in Portugal, as well as ethnic problems. In fact, the Ministry of Foreign Affairs had been intensifying efforts to prevent the immigration of Jewish people to the metropole since 1933, as their presence was considered potentially dangerous.<sup>90</sup>

Therefore, Colonel Beck's plea for an international solution to Poland's lack of raw materials and its surplus population in the League of Nations in September 1936 was naturally regarded with suspicion. The Portuguese representation in Warsaw was requested to attend the propaganda sessions organised by the Polish Maritime and Colonial League in order to assess the existence of peril to Portugal's interests.<sup>91</sup>

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<sup>88</sup> Copy of the César de Sousa Mendes's letter to the Ministry of Foreign Affairs, 24<sup>th</sup> July 1936, AHU, MU, DGAPC/1H/1029/ Processo 34-A – Penetração Polaca em Angola

<sup>89</sup> Medina, João and Joel Barromi (1987-1988), 'O Projecto de colonização judaica em Angola. O Debate em Portugal da proposta da ITO (Organização Territorial Judaica), 1912-1913', *Clio – Revista do Centro de História da Universidade de Lisboa*, vol. 8, pp. 79-139; Medina, João and Joel Barromi (1991), 'The Jewish colonization project in Angola', *Studies in Zionism*, 12 (1), pp.1-16; Schäfer, Ansgar (1995), 'Terra prometida "no império"?: Os projectos de colonização israelita em Angola', *História*, 9 (June 1995), pp. 35-39; Schäfer, Ansgar (1995), 'Angola, Terra Prometida?', *História*, 14 (November 1995), pp. 52-64; Martins, Jorge (2006), *Portugal e os Judeus*, vol. III, *Judaísmo e anti-semitismo no século XX*, Lisboa, Vega, pp. 67-88.

<sup>90</sup> On the evolution of *Estado Novo's* rhetoric regarding the entrance of Jewish, Russian, and stateless people, which were perceived as 'invaders', see Chalante, Susana (2011), 'O discurso do Estado salazarista perante o "indesejável" (1933-1939)', *Análise Social*, vol. XLVI (198), pp. 41-63.

<sup>91</sup> See copy of the report regarding the Maritime and Colonial League's demonstrations held on 21<sup>st</sup> to 23<sup>rd</sup> November 1936, sent to the Ministry of Foreign Affairs on 30<sup>th</sup> November 1936,

Although the Portuguese colonies were not directly mentioned in the propaganda sessions, according to the Portuguese legate, there was a campaign against the colonial countries in the Polish press, which was encouraged by the Government. Portugal was invariably depicted as a poor and scantily populated country, unable to explore the resources of its colonies. Unlike Poland, which needed colonies to assure its subsistence, Portugal had the empire for sentimental rather than economic reasons.<sup>92</sup> In the wording of an article *Nowa Prawda* (the organ of the Party of Labour), the Portuguese colonial empire was ‘a real anachronism’ and there was no reason for its maintenance in the current context: Portugal resembled an ‘old paralytic lady, hiding treasures which she cannot use anymore in her mattress’.<sup>93</sup>

Likely due to the lack of knowledge in Polish language, the supposed campaign against Portugal in the Polish press went unnoticed outside the diplomatic circle. In metropolitan Portugal, Poland’s colonial claims were deemed as unreasonable dreams.<sup>94</sup> Poland was seen as a greedy young nation with ‘an illusory notion of colonial work’, ignoring the ‘very special conditions in which a country can undertake it and carry it effectively’.<sup>95</sup> It was thus the opposite of Portugal, an old nation with extensive colonial experience and possessor of the essential characteristics to be a coloniser. The paternalistic tone used to remind that colonialism was not suitable for everybody and colonisation could not be seen as a mere solution for overpopulation and lack of raw materials at home might suggest that Polish claims were not perceived as a significant threat. It was believed that Poland would not be granted any overseas territory, let alone a Portuguese colony. However, Polish demands fuelled the international debate on the

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and copy of the letter from César de Sousa Mendes to the Minister of Foreign Affairs regarding the Colonial Days conference held in Warsaw on 11<sup>th</sup> April 1938. Both in ANTT, AOS, CO, UL-12 cx. 805, Reivindicações coloniais, pasta 1, 4 sub-seccção, Pretensões Coloniais da Polónia.

<sup>92</sup> *Oredownik Rawicki*, 29<sup>th</sup> November 1937, according to the translation provided by the Portuguese legation in Warsaw, AOS/ CO/UL-12 cx. 805, Reivindicações coloniais, pasta 1, 4 sub-seccção, Pretensões Coloniais da Polónia, ff. 194-195.

<sup>93</sup> *Nowa Prawda*, 1<sup>st</sup> January 1938, according to the translation provided by the Portuguese legation in Warsaw, AOS/ CO/UL-12 cx. 805, Reivindicações coloniais, pasta 1, 4 sub-seccção, Pretensões Coloniais da Polónia, ff. 198-199.

<sup>94</sup> Costa, Augusto (1938), ‘Crónica Colonial’, *Boletim Geral das Colónias*, 153 (March 1938), pp. 53-60.

<sup>95</sup> *Diário de Notícias*, 5<sup>th</sup> December 1937, p. 1.

redistribution of colonial territories and/or the introduction of new regimes of colonial administration – that was the real peril.<sup>96</sup> In this way, what was really worrying about Polish aspirations was not the aspirations in itself but rather the fact that they called attention to a more important and alarming colonial problem that was dominating international relations at the time: German colonial claims.

### **2.2.3. Towards a new partition of Africa? German claims, colonial appeasement, and the revision of colonial distribution**

From 1936, international debates about the German colonial question intensified. The German Colonial League was re-founded and incorporated in the state structure. As its leader, Franz Ritter von Epp, explained in article published in the September 1936 issue of *Europäische Revue*, the time had come to Germany reclaim a fair share of the world riches to satisfy its needs for land and raw materials, as well as the right to co-operate in the education of backward peoples.<sup>97</sup> In addition, Hitler himself expressed the hope of restoring the colonial equality of rights that year, demanding the return of the former German colonies.

Despite the Portuguese efforts during the Peace Conference, Portugal was not granted any League of Nations' mandates when the German colonial empire was divided following the Treaty of Versailles.<sup>98</sup> However, the Supreme Council of the

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<sup>96</sup> *Diário de Notícias*, 6<sup>th</sup> December 1937, p. 1.

<sup>97</sup> The article was sent by the author to the *Journal of the Royal African Society* in response to a request for an authoritative statement of the German point of view regarding the German 'colonial problem'. The translation to English was published in early 1937. Ritter von Epp (1937), 'The Question of colonies: The German Standpoint', *Journal of the Royal African Society*, 36 (142), p.7.

<sup>98</sup> For the Portuguese frustrated attempts, see Cruz, Duarte Ivo (2009), *Estratégia Portuguesa na Conferência de paz, 1918-1919. As Actas da Delegação Portuguesa*, Lisbon, Fundação Luso-Americana.

Principal Allied Powers had directly assigned the Kionga triangle to Portugal in full sovereignty rather than as a mandate before the signature of the Peace Treaty. The Kionga triangle was a narrow territory on the border between German East Africa and Portuguese Mozambique located in the south of the mouth of the Ruvuma River. According to the German-Portuguese convention of 30<sup>th</sup> December 1886, which had defined the Ruvuma as the natural boundary line between the dominions of the two countries, Kionga fell on the Portuguese side. The territory had been seized by German troops in 1894, though. After Germany's refusal to submit the question to international arbitration, a compromise was reached through the exchange of diplomatic notes: Portugal ended up recognising Germany sovereignty, which at the time met with objections and considerable criticism.<sup>99</sup> A new, updated convention for the definition of boundaries between German East Africa and Portuguese Mozambique was never signed. Thus the Portuguese representatives at the Peace Conference argued that Kionga had never been German, having been illegitimately occupied for decades. Taking into account the diplomatic documents they presented, it was concluded that Portugal had been virtually forced to yield. Therefore, the Supreme Council of the Principal Allied Powers recognised Portugal 'as original and rightful owner' of the Kionga triangle on 6<sup>th</sup> May 1919.<sup>100</sup>

The specificity of the Kionga question shaped Portuguese reactions when Germany began officially demanding its colonies back in the mid-1930s. In general, Germany's demand for the restitution of its former colonies was perceived as a natural claim, although it was not endorsed. Had the Peace treaty gone too far? Many questioned whether the victorious powers had been blind by the selfish wish of territorial aggrandisement in Africa when looking for a punishment for the defeated countries and whether mandates should be reverted for the sake of world peace. To be sure, voices against a possible restitution could also be heard. For instance, *Humanidade*, a colonial propaganda periodical owned and directed by João Viana de

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<sup>99</sup> In fact, even in 1905 Kionga was still invoked in parliamentary discussions to censure members who had been in the government at time of the Portuguese renunciation, poetically arguing that the entire country had 'wept tears of blood' due to the loss of the territory. See *Diário da Câmara dos Senhores Deputados*, 1<sup>st</sup> May 1905, p. 16

<sup>100</sup> Thomas, H.B. (1951), 'The Kionga Triangle', *Tanganyika Notes and Records*, Volume 31, pp. 47-50.

Sousa e Almeida, a descendent of the Baron of Água Izé, who was one of the few African owners of São Tomé and Príncipe's *roças*, feared that the treatment given to Africans would be worse than the one given to Jewish people.<sup>101</sup> This concern with racial persecution in Germany was not exclusive of elements of the African elite in Lisbon, being found also in newspaper *Jornal do Comércio e das Colónias*, which invited its readers to reflect on the 'lack of humane and moral element' of German colonial doctrine, claiming that their only aim was to take a new outpost for Aryan race expansion, neglecting or exploring the natives: 'What a strange combination! A people who cultivate immaculate purity of race to the extent of persecuting Jews like cursed dogs with colonial pretensions! A contradiction [which is] only possible through the total corruption of colonisation.'<sup>102</sup>

Either rejecting or accepting the idea of returning its former colonies to Germany, there was a transverse aspect: despite being on the Allied side, Portugal had nothing to do with the problem created by the German demands for the return of colonies as Portugal 'was not heir to Germany' – or a heir to anyone – in colonial matters, having a clear conscience.<sup>103</sup> From this perspective, the beneficiaries of the colonial sharing after 1919 were France, Belgium, South African Union, and Britain, in Africa, and New Zealand, Japan, and Australia, in the Pacific. The Portuguese printed media coverage of German colonial claims frequently emphasised in bold titles that the Germans only wanted what was theirs – or, as sometimes was formulated in pro-German *O Século*, what *is* theirs. It was always assumed that it did not comprise Kionga: 'Portugal does not own an inch of German land', as could be read on the first page of *Diário da Manhã*.<sup>104</sup> Therefore, the publication of articles in Boston's *Christian Science Monitor* and the *Deutsche Kolonial-Zeitung* (the official organ of the German Colonial League) in which Kionga was referred as a former German colony, even though outside the mandate system, was received with righteous anger. The

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<sup>101</sup> *Humanidade*, 15<sup>th</sup> December 1935, p. 1

<sup>102</sup> *Jornal do Comércio e das Colónias*, 7<sup>th</sup> August 1936, p. 1.

<sup>103</sup> Costa, Augusto (1938), 'Crónica Colonial', *Boletim Geral das Colónias*, 152 (February 1938), p. 68.

<sup>104</sup> *Diário da Manhã*, 6<sup>th</sup> December 1937, p. 1

‘misunderstanding’ was clarified in the pages of *Diário de Notícias* through the authoritative voice of the Count of Penha Garcia: trained in Law and Political Science, at the time director of both the Colonial School and the Lisbon Geographical Society and Portuguese representative at the League of Nations’ Permanent Mandates Commission and member of the Portuguese delegation at the Peace Conference, he assured that Portugal had always been the only country having a legally and morally just claim over Kionga.<sup>105</sup> Therefore, Kionga was itself a restitution, not subject to be returned to Germany. The pervasiveness of a similar understanding was further corroborated by the distress and astonishment expressed by the Portuguese legate in Berlin, Veiga Simões, when reporting to his Lisbon superiors that he had been shown a map in possession of a German officer in which Kionga triangle was included along with the territories ceded following the Peace treaty.<sup>106</sup> Due to the specificity of the Kionga question, it was asserted that the Portuguese colonial empire would be left outside discussion if any solution to appease German demands was to be found in Africa. However, reality proved to be very different: Portugal saw its colonial empire being placed at the centre of rumours and debates in the following years.

On 18<sup>th</sup> November 1933, a German colonial society organised a conference in Berlin about the possibilities for German expansion in the Guinea Gulf. The speaker, Dr Schlubach,<sup>107</sup> suggested that, in addition to the restitution of Togo and Cameroon, Germany should try to reach an amicable agreement with Portugal to obtain part of Angola and the Portuguese Guinea. In his opinion, ‘little Portugal was absolutely incapable of making use of its colonial empire, which is twenty-four times bigger than

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<sup>105</sup> *Diário de Notícias*, 18<sup>th</sup> August 1935, pp. 1-2.

<sup>106</sup> Veiga Simões, from the Portuguese legation in Berlin, to the Ministry of Foreign Affairs, 2<sup>nd</sup> December 1937, ANTT, AOS, CO, UL-12, cx. 805, Reivindicações coloniais, pasta 1, 9<sup>a</sup> subdivisão, ff. 616-617.

<sup>107</sup> It was likely Roderich Schlubach, one of the heads of the Schlubach, Thiemer & Co., who received the title of "Doctor Honoris Causa" from the University of Hamburg because of his involvement with Institute of Tropical Medicine in Hamburg. Sá, Magali Romero and André Cândido da Silva (2007), 'Por entre páginas do imperialismo germânico na América Latina: a Revista Médica de Hamburgo e a Revista Médica Germano-Ibero-Americana (1920-1933), *XXIV Simpósio Nacional de História*, Associação Nacional de História.

the European metropole. It does not need so many colonies, as it is an agricultural and non-overcrowded country.<sup>108</sup>

On the contrary, Germany was industrialised and overpopulated, having the urgent need of expanding its territory. Agostinho de Campos, the author who called attention to this conference in an article amusingly titled ‘Acute colonialitis’ (*Colonialite Aguda*), had formerly showed a certain sympathy for German colonial claims. In his view, expropriate Germany, which had ‘a numerous, expansive, and prolific people’, from its colonies had been a political mistake.<sup>109</sup> His sympathy vanished when commenting Schlubach’s suggestion and the threat over the Portuguese empire. Even though Germany needed colonies, Portugal had nothing to do with the problem of lack of space and overpopulation in the country: neither was Portugal ‘who made Germany into its tight limits, nor did it father any of numerous Germans who do not fit into what is theirs’.<sup>110</sup>

Schlubach’s idea found an echo in the written media. An array of rumours referring that Germany had or was about to buy, rent, or obtain through negotiation with Britain parts of the Portuguese empire, particularly Angola, appeared in the international press, especially from 1935 until the outbreak of the Second World War. The examples are plentiful: in fact, rumours were so common that they became referred in the Portuguese press as the ‘old question’ or the ‘usual question’.<sup>111</sup> For instance, on 22<sup>nd</sup> June 1935, *Le Temps* and *L’Écho de Paris* reported that the Reich Minister Ambassador-Plenipotentiary at Large, von Ribbentrop, and the British Prime Minister,

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<sup>108</sup> ‘Pelo contrário, o pequeno Portugal é absolutamente incapaz (*gar nicht in der Lage sei*) de utilizar o seu império colonial, vinte e quatro vezes maior que a Metrópole europeia. Não precisa de tantas colónias, como país agrícola e não sobrepovoado que é.’ Quoted in Campos, Agostinho de Campos (1935[1933]), ‘Colonialite Aguda’ in Idem, *A Fé no Império*, Lisbon, Imprensa Otosgráfica, p. 130.

<sup>109</sup> Campos, Agostinho (1933), ‘Aspirações Coloniais Alemães’, February 1933, collected in Campos, Agostinho (1935), *A Fé no Império*, Lisbon, Imprensa Otosgráfica, p. 118.

<sup>110</sup> ‘Portugal não tem culpa, porque nem foi ele que fez a Alemanha apertada nas suas costuras, nem é pai de nenhum dos numerosos alemães que não cabem naquilo que é deles’. ‘Colonialite Aguda’, December 1933, collected in Campos, Agostinho (1935), *A Fé no Império*, Lisbon, Imprensa Otosgráfica, p. 132.

<sup>111</sup> It is almost unfeasible to track all of them: often the origin is not identified in the Portuguese press and the government’s press releases. Vague indications such as ‘the usual international newspapers’, ‘a certain French press’ or ‘a certain British press’, as well as the lack of specification of the dates of publication, predominate.

Stanley Baldwin, had also discussed colonial matters during negotiations with view to the Anglo-German Naval Agreement: as Germany would not content itself with mandates and aspired colonies in full sovereignty but Britain had no interest in returning the territories under its mandatory power, Angola and Mozambique had been put on the table.<sup>112</sup> Similarly, in late December that year, *The New York Times* alluded to a plan to satisfy Germany through deals on Portuguese colonies that could aid Germany's economic situation and appease the current anxiety amongst Europeans statesmen.<sup>113</sup>

Another example: on 21<sup>st</sup> July 1936, an unsigned article in Johannesburg's *Sunday Express* entitled 'Nazi's African Plan' stated that the German government had intention to approach the government of Union of South African to negotiate a solution for its colonial problem. According to the article, the Germans would abandon their claims for the return of South West Africa; in return of Union of South Africa's government support of German demands for the restitution of Tanganyika. As a bonus, Portuguese East Africa – i.e. Mozambique – would be mutually divided along the line of the Zambezi: the north section would be incorporated in Tanganyika, Beira and the southern half would be incorporated in South Africa Union's territory.<sup>114</sup>

Also, later that year, the *Neue Basler Zeitung* from Basel reported that Portugal and Germany had concluded an agreement for the transfer of Angola.<sup>115</sup> Although the news had already been denied in Berlin,<sup>116</sup> a week later *Le Temps* advanced more details: the German Colonial League, on behalf of the German government, had been in negotiations with the Portuguese government over Angola: the French daily could not

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<sup>112</sup> *L'Écho de Paris*, 22<sup>nd</sup> June 1935, p. 3. *Le Temps*, 22<sup>nd</sup> June 1935, p. 1.

<sup>113</sup> *The New York Times*, 30<sup>th</sup> December 1935, p. 1.

<sup>114</sup> *Sunday Express*, 21<sup>st</sup> July 1936. See also *Boletim da Sociedade de Geografia de Lisboa*, 7/8 (July-August 1936), pp. 422-423, where the *Sunday Express'* article is translated and commented.

<sup>115</sup> *Neue Basler Zeitung*, 8th December 1936. Retrieved in ANTT, AOS, CO, UL-12, cx. 805 Reivindicações coloniais, pasta 1, 12<sup>a</sup> subdivisão.

<sup>116</sup> See copy of the telegram from Veiga Simões to the Ministry of Foreign Affairs, ANTT, AOS, CO, UL-12, cx. 805 Reivindicações coloniais, pasta 1, 12<sup>a</sup> subdivisão.

precise if Angola as a whole or only the southern region of the colony were under negotiation but reassured that the territory would be given on hire to Germany.<sup>117</sup>

In addition, in late 1937, a trip to Berlin by Lord Halifax, who will be nominated minister of Foreign Affairs a couple of months later, and his meetings with Hitler and Hjalmar Schacht,<sup>118</sup> gave rise to new rumours. *The Observer*, *the Daily Telegraph*, and the *Daily Mail* reported that, in conversation with Halifax, Hitler had been informed that Germany demanded its former protectorates in West Africa, Togo and Cameroon, back but it could reconsider the return of Tanganyika in exchange of a reasonable compensation made of a block with parts of Belgian Congo and Angola to be administered as a League of Nations' mandate.<sup>119</sup>

In its turn, *The Evening Standard* reported that the idea had been presented to Halifax by Schacht instead of Hitler, illustrating its article with a map that gave a clearer idea of the limits of the aforementioned block.<sup>120</sup> The alleged Schacht's plan returned to the front page of this London newspaper less than a year later: the visit of Oswald Pirow, the Union of South Africa's minister of Defence who was openly sympathiser of Nazi Germany and advocate of Germany return to Africa, to Lisbon was presented as a mission 'to discuss Germany's colonial aspirations with the Portuguese Government.'<sup>121</sup>

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<sup>117</sup> *Le Temps*, 14<sup>th</sup> December 1936, p. 6. It is likely that the same news appears in other French publications: Salazar's communiqué regarding the rumours, which was issued only in late January 1937, referred additional information, such as the 99-years long duration of the hire to Germany and that the deal involved the supply of ordnance for the Portuguese army. Salazar, António de Oliveira, *Discursos e Notas Políticas*, vol. III, Coimbra, Coimbra Editora, pp. 257-263. However, the press officer of the Portuguese embassy in Paris sent a retraction only to *Le Temps*. See copy of the letter from the press officer of the Portuguese embassy in Paris sent by the Directorate General of Political Affairs and Economic of the Ministry of Foreign Affairs to the chief of staff of the Ministry of Colonies, 21<sup>st</sup> January 1937, AHU, MU, DGAPC, Junta Central de Trabalho e Emigração, mç. 996, processo 16/1 - Reivindicações Coloniais.

<sup>118</sup> The German Minister of Economy was an active governmental voice for the promotion of German colonial cause abroad. See Schacht, Hjalmar (1937), 'Germany's Colonial Demands', *Foreign Affairs*, 15 (2), pp. 223-234.

<sup>119</sup> The articles are summarised in an editorial in *Diário de Notícias*, 3<sup>rd</sup> December 1937, p. 1.

<sup>120</sup> *The Evening Standard*, 1<sup>st</sup> December 1937, p. 1.

<sup>121</sup> *The Evening Standard*, 25<sup>th</sup> November 1938.

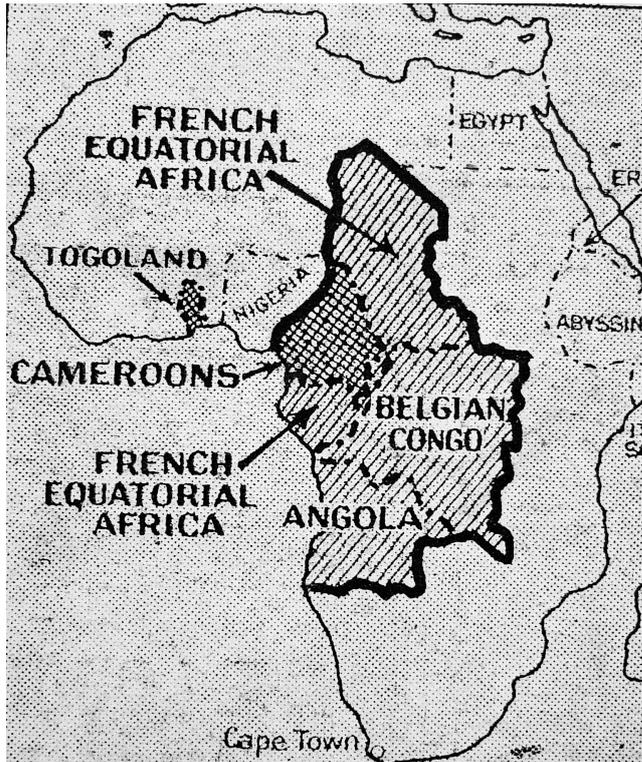


Figure 2.2. 'Schacht's plan' according to *The Evening Standard*, 1<sup>st</sup> December 1937, p. 1

The gridded areas correspond to former German colonies; the striped ones would be new acquisitions to compensate from the loss of German South-West Africa and Tanganyika.

In Portugal, the proposal was classified as a mere invention or fantasy of the European leftist press with the aim to attack both Portugal and Germany, two conservative political regimes.<sup>122</sup> It was recalled that attempts to reach 'understandings at the expense of others' had already failed in 1912: a third Anglo-German convention over the Portuguese empire would go down the same path.<sup>123</sup> Furthermore, since Schacht had been recently dismissed, it was assumed that, if he had presented such proposal to Halifax, he could not be speaking on the behalf of the German government.<sup>124</sup> Actually, according to Lord Halifax's statement regarding his trip in a meeting with the French Prime-Minister Camille Chautemps, the French minister of Foreign Affairs, Yvon Delbos, and the British Prime-Minister, Neville Chamberlain,

<sup>122</sup> *Diário da Manhã*, 29<sup>th</sup> November 1937 and 5<sup>th</sup> December 1937; *O Século*, 3<sup>rd</sup> and 5<sup>th</sup> December 1937.

<sup>123</sup> *Diário de Notícias*, 24<sup>th</sup> November 1937, p. 1

<sup>124</sup> *Diário de Notícias*, 28<sup>th</sup> November 1937, 3<sup>rd</sup> and 4<sup>th</sup> December 1937.

held in London in early December 1937, the idea of creating a block with parts of Belgian Congo and Angola that the media had dubbed Schacht's plan had in fact been suggested in Berlin.<sup>125</sup> The suggestion pleased both French and British governments.

Even though mandates were not colonies from the international law's point of view and only class C mandates were formally administrated as integral portions of the mandatory power's territory, mandates had become part of the respective empires in France and Britain. Neither France nor Britain was open to renounce to their rights as mandatory powers. Nevertheless, according to an editorial article in *The Times*, the discussion of Germany's colonial question was not entirely rejected in Britain, as long an alternative solution that did not involve the return of the mandates was found in order to preserve European peace.<sup>126</sup> In this context, Chamberlain traced a new and daring plan to create a special regime in Central Africa in early 1938. The limits of the wide area in question were as follows: the northern boundary would be a line traced roughly at south of the Sahara, the Anglo-Egyptian Sudan basin and Italian Somaliland; the southern boundary would be a line running to the south of Portuguese West Africa (Angola), the Belgian Congo, Tanganyika and Portuguese East Africa (Mozambique).<sup>127</sup> Shortly, it comprised the former German colonies, with the exception of German South West Africa (which was under the mandatory power of Union of South Africa, a British Dominion), together with Belgian and Portuguese colonies. The territories would be administrated in a way similar to mandates and Germany would be invited to join colonial powers, receiving a share in proportion to its needs and its capacities to colonise.<sup>128</sup>

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<sup>125</sup> Records of Cabinet Committees, Minute 10, 6<sup>th</sup> December 1937, TNA, CAB 27/626.

<sup>126</sup> *The Times*, 28<sup>th</sup> October 1937, p. 17

<sup>127</sup> Memorandum on the Action taken with regard to German colonial claims since the beginning of 1938, 10<sup>th</sup> November 1938, TNA FO 371/21682, C13657/G.

<sup>128</sup> On the British plans to accommodate Germany's demands at the expense of Portugal and Belgium on the eve of the Second World War, see Louis, W. Roger (1971), 'Colonial Appeasement, 1936-1938', *Revue Belge de Philologie et d'Histoire*, 49 (4), pp. 1175-1191 and Stone, Glyn (1994), *The Oldest Ally. Britain and the Portuguese Connection, 1936-1941*, London, Royal Historical Society, pp. 82-113. See also Callahan, Michael D. (2004), *A Sacred Trust. The League of Nations and Africa, 1929-1946*, Brighton-Portland, Sussex Academic Press, pp. 124-130.

Although Chamberlain's plan remained secret, the idea of colonial redistribution according to the needs of the metropolises and their facilities to develop the colonies and civilise the natives was being publicly discussed since the mid-1930s. The revision of the international codes of colonial domination gathered more and more supporters, not only in countries without colonies or which aimed to increase their colonial power but also in France and Britain. For instance, for Georges Scelle, the renowned French jurist, expert in international law and formerly technical adviser to the French delegation at Assembly of the League of Nations, colonialism was a matter of international law rather than public law. In his celebrated *Précis du Droit des Gens*, he defended that 'backward people' should be administered by an international government as a unified colonial dominion until they were prepared for self-determination. From Scelle's federalist point of view, the League of Nations' mandate system was a first step for the internationalisation of the colonial phenomena but was still insufficient.<sup>129</sup>

In a similar vein, in Britain, the Advisory Committee on Economic and Colonial Questions of the National Peace Council defended the extension of the mandate system to every country with 'peoples of primitive culture'. The committee also endorsed the reinforcement of the League of Nations' administration of the mandated territories, recommending progressively direct involvement of the international organisation in their government.<sup>130</sup>

A milder form of international colonialism was proposed by the League of Nations' committee for the study of the problem of raw materials in 1937.<sup>131</sup> The committee had been formed as a result of the British Secretary of State for Foreign Affairs Samuel Hoare's suggestion in September 1935. During an intervention at the

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<sup>129</sup> Scelle, Georges (1932-1934), *Précis du Droit des Gens. Principes et systématique*, Paris, Librairie du Recueil Sirey. See also Santa-Rita, José (1935), 'Nacionalismo e internacionalismo colonial', *Boletim Geral das Colónias*, 115 (January 1935), pp. 10-35. For a general account on Georges Scelle's thought, see Thierry, Hubert (1990), 'The European Tradition in International Law: Georges Scelle', *European Journal of International Law*, 1 (1/2), pp. 193-209.

<sup>130</sup> National Peace Council. Advisory Committee on Economic and Colonial Questions (1936), *Peace and Colonial Politics*, London School of Economics Archive, Pamphlet Collection, JC/B107.

<sup>131</sup> 'The Report of the League Committee on Raw Materials' in *Bulletin of International News*, 14(6), pp. 3-11

assembly of League of Nations when the Italian-Ethiopian conflict was on the verge, Hoare had declared that Britain was receptive to take part in a collective attempt to find new solutions for making better use of the world's economic resources for the sake of European peace, asking for further study regarding the distribution of raw materials.<sup>132</sup> The League's Committee on Raw Materials considered that a freer circulation of capital, goods, and labour would be crucial to overcome the current imbalance in the access of raw materials and markets; nevertheless, it had some reservations regarding the indiscriminate application of the 'Open Door' principle – i.e. the principle of uniformity and equality of economic opportunity for all nations trading with the colonial territories. This idea was supported by the British Labour Party, which was one of the parties in power as part of the National Government coalition. Despite rejecting any transfer of territories to Germany, the Advisory Committee on Imperial Questions of the Labour party had suggested 'a real experiment of direct League administration in some selected area': the transference of colonial territories from national to international government would eliminate 'the distinction between satisfied and unsatisfied Powers'<sup>133</sup>

In Portugal, all the suggestions for internationalisation of colonies to appease European tensions – either involving a transfer of sovereignty over colonial territories from a country to another or the creation of a common protectorate –, were rejected on the basis they were part of a concerted 'policy of grab' initiated by the 1884-1885 Conference of Berlin.<sup>134</sup> From the Portuguese perspective, greater European powers were constantly drawing new and inventive ways to change the established rules of the 'colonial game' in order to despoil weaker nations which legitimately ruled over areas

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<sup>132</sup> Sir Samuel Hoare's speech at the Assembly of the League of Nations was widely disseminated. The full text can be found, for instance, in *The Times*, 12<sup>th</sup> September 1935, p. 7.

<sup>133</sup> Labour Party – Advisory Committee on Imperial Questions (1936), *The Demand for Colonial Territories and Equality of Economic Opportunity*, London, Labour Party, p. 48. See also Bush, Barbara (1999), *Imperialism, Race and Resistance: Africa and Britain 1919-1945*, London, Routledge, pp. 258-261. Callahan, Michael D. (2004), *A Sacred Trust. The League of Nations and Africa, 1929-1946*, Brighton-Portland, Sussex Academic Press, p. 91, Douglas, R. M. (2004), *The Labour Party, nationalism and internationalism, 1939-1951: a new world order*, London, Routledge, pp. 182-183.

<sup>134</sup> See Leite de António (1937), 'Piratas Antigos e Modernos' in *O Mundo Português*, 47 (November 1937), pp. 495-500.

of economic and/or strategic significance. The creation of the Congo Free State was recalled as an example of how attempts to internationalisation failed: the International African Association soon resulted in a national enterprise; the Congo Free State was ‘neither a state nor free’ but rather ‘a colony in disguise’.<sup>135</sup> For Colonel Leite de Magalhães, a respected colonialist who had accumulated military and administrative experience in Timor and Portuguese Guinea, the origin of the ‘colonial plunder’ dated back the Discoveries age, being a new form of piracy: the ‘piracy of the diplomatic offices’ in which the ‘halls of intrigue’ had replaced the battlefields.<sup>136</sup> The comparison provides an interesting insight into the contemporaneous perception of attempts to redistribute colonies: even if operating under a veil of international legitimacy, they were perceived not only as immoral but also as criminal, violent acts.

Although Portugal had been ‘a victim’ in past inter-empire conferences and negotiations – or the victim, as it is represented as the only colonial power in Africa that had not benefit from the partition of Africa and the truly dispossessed of the entire process, African peoples, were out of consideration –, both the minister of Foreign Affairs, Armindo Monteiro, who had recently left the Ministry of Colonies, and the new minister of Colonies, José Ferreira Bossa, promptly denied that Portugal had motives to be concerned when directly asked by journalists if the world was moving towards a new partition of Africa.<sup>137</sup> The ministers’ tranquillity in public interventions contrasts with the attitude of the Portuguese legate in Berlin: Veiga Simões was intrigued with the increasing number of visa requests by German princes and barons interested in establishing themselves as farmers in Angola; he feared a concerted action with the aim

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<sup>135</sup> Santa-Rita, José (1935), ‘Nacionalismo e internacionalismo colonial’, *Boletim Geral das Colónias*, 115 (January 1935), p. 20. See also Count de Penha Garcia’s article in *O Mundo Português*, Frazão, José Capelo Franco (1937), ‘O Império Colonial e os Internacionalismos’, *O Mundo Português*, 37 (January 1937), pp. 5-7.

<sup>136</sup> Leite de Magalhães, António (1937), ‘Piratas Antigos e Modernos’ in *O Mundo Português*, 47 (November 1937), p. 499. See also Leite de Magalhães, António (1937), ‘Curso de Salão’, *O Mundo Português*, 48 (December 1937), pp. 561-566

<sup>137</sup> Respectively, *Diário de Notícias*, 17<sup>th</sup> August 1935, p.1; *Diário de Notícias*, 22<sup>nd</sup> August 1935, p. 1. See also Armindo Monteiro’s interview with *Diário de Notícias* after his return from a Council of the League of Nations’ meeting after the invasion of Ethiopia in *Diário de Notícias*, 19<sup>th</sup> October 1935, pp. 1-2.

to require the possession of Angola in a near or medium-term future on the basis of grouping all Germans under the Reich sovereignty.<sup>138</sup>

The reasons for both Armindo Monteiro and José Ferreira Bossa apparent serenity were based on two core arguments that resonated among the printed media at the time and would be developed as the question of colonial redistribution to appease German claims intensified. They can be identified in most comments and contributions in the heated discussion of the supposed transformation of colonial order. A first argument, which predominated in reactions to rumours concerning the sale or lease of the Portuguese empire, was related with financial soundness and colonial development. The past episodes of negotiation over the Portuguese colonies were associated with situations of economic and financial weakness. It was emphasised that this was a situation of the past. Portugal had adopted a good model of administration in both the metropole and the colonies, inverting the tendency of decay and promoting colonial development. Due to Salazar's competent management, Portugal of the 1930s was significantly different from 1885, 1898, or 1912 and so was the empire, which had been recently modernised. Already in 1931, Salazar had publicly invoked the *Memoirs of Prince von Bülow*'s passages regarding the Anglo-German conventions as a reminder of financial crisis was used abroad to legitimate spoliation plans in order to legitimise his austerity policies.<sup>139</sup> When *L'Écho de Paris* suggested that von Ribbentrop-Baldwin meetings had included a discussion of Portuguese colonies, the Ministry of Foreign Affairs quickly issued a press release clarifying that 'the current Portuguese financial situation is such as to provide assistance to others than to receive it.'<sup>140</sup>

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<sup>138</sup> Copy of Veiga Simões' letter to the Ministry of Foreign Affairs, dated 2<sup>nd</sup> March 1935, forwarded to the Ministry of Colonies, AHU, MU, DGAPC/1H/1029/ Processo 34-A - Penetração Alemã em Angola.

<sup>139</sup> The speech was delivered in a demonstration in support of the government promoted by *União Nacional* on 17<sup>th</sup> May 1931. Reprinted in Salazar, António de Oliveira (1948), *Discursos*. Volume Primeiro, 1928-1934, Coimbra, Coimbra Editora (4<sup>th</sup> Edition), pp. 122-124.

<sup>140</sup> Press release from the Ministry of Foreign Affairs on 15<sup>th</sup> August 1935. Consulted in *Diário de Notícias*, p. 1.

Nevertheless, although *The Times* had published an article on Salazar ‘as one of the greatest Finance Ministers of modern times’,<sup>141</sup> the image of Portugal as an indebted country was still powerful and its colonising capacity was questioned. Besides the aforementioned articles in Italian and Polish press, the idea was also reproduced in countries without colonial expansionist ambitions. The British *Daily Express* referred that the Portuguese had learnt little about colonisation in the many centuries as a colonial power, concluding that Africans would benefit if their governors were not the Portuguese.<sup>142</sup> As it was summarised in another brief contemporaneous account, ‘Portugal lacks the capital, the man power and the energy to develop her colonies’: it would thereby be difficult for the country to ‘prove that she herself needs or is able to fully to utilize the resources of her extensive colonial domain’, if a future repartition of Africa took place to accommodate the renovated German colonial claims.<sup>143</sup> For the author, who was a scholar researching on international relations, ‘one of the anomalies of modern history is the survival of Portugal as an important colonial Power’.<sup>144</sup>

To be sure, there were also Portuguese voices concerned about the lack of financial capacity to administer colonies. In 1932, Bernardino Machado, former president of Republic who was in office at the time of overthrow of the First Republic and was currently exiled in France, was able to circulate a leaflet in which he heavily criticised Salazar’s financial policies and the impact on empire:

Which argument was invoked by greedy foreigners in 1898 to oust us from the colonies? Our lack of resources to manage them. We should not tolerate that the sinister master of Finances, who organised dictatorial gang’s the theft-

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<sup>141</sup> *The Times*, 15<sup>th</sup> March 1935, p. 15.

<sup>142</sup> *Daily Express*, 23<sup>rd</sup> July 1937. The article was referred and quoted at length in *Diário de Notícias*, 11<sup>th</sup> August 1937, p. 1, and later in Leite de Magalhães, António (1937), ‘Curso de Salão’, *O Mundo Português*, 48 (December 1937), pp. 561-566

<sup>143</sup> Woolbert, Robert Gale (1937), ‘The Future of Portugal’s Colonies’, *Foreign Affairs*, 15 (2), p. 379

<sup>144</sup> Woolbert, Robert Gale (1937), ‘The Future of Portugal’s Colonies’, *Foreign Affairs*, 15 (2), p. 374. Meaningfully, a translation into Portuguese of Woolbert’s text can be found amongst the papers received by Salazar’s office. ANTT, AOS, CO, UL-12, cx. 805 Reivindicações coloniais, pasta 1, 7<sup>ª</sup> subdivisão, ff 572-587.

budget, makes that [argument] true. The misery of Portugal will be irreparable.

History repeats itself.<sup>145</sup>

By the same token, in June 1935 Henrique de Paiva Couceiro wrote a letter to captain Mário Pessoa to be widely distributed in the barracks. Paiva Couceiro was a respected hero of the military Campaigns of ‘Pacification’ in Africa and an influential figure in the movement for the restoration of the monarchy. In the letter to captain Mário Pessoa, Paiva Couceiro accused Salazar and his austere budgets of undermining the Armed Forces, especially regarding their presence in the colonies. In his view, Salazar had weakened Portugal’s ability to defend the empire: balanced budgets ‘would not prevent England from giving Angola to Germany to save itself’. Whilst Bernardino Machado was already in exile by the time he circulated his leaflet, Paiva Couceiro would be banished from national soil for six months as a consequence of his letter.<sup>146</sup> Bernardino Machado’s and Paiva Couceiro’s voices – or other possible voices defending that Salazar’s financial policies were compromising rather than protecting the Portuguese empire from foreign ‘colonial lusts’ that were not recorded or could not be tracked nowadays – were silenced.<sup>147</sup> Financial soundness and its function in the protection of empire were presented as an unquestionable.

The second argument, which appeared intertwined with the argument on Portuguese financial soundness, was related to the uniqueness of the Portuguese empire. It is predicated on the discourse about the special ties bonding colonies and metropole,

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<sup>145</sup> ‘Que argumento a cobiça estrangeira invocava em 1898 para nos esbulhar das colónias? A nossa falta de recursos para as administrar. Não toleremos que o torvo mestre de finanças que organizou o orçamento do roubo do bando ditatorial à nação o torne verdadeiro. A miséria de Portugal vai sendo irreparável. A história repete-se.’ Machado, Bernardino (1932), *Nova ofensiva ao património ultramarino de Portugal*. A copy of the leaflet, which dated the 28<sup>th</sup> February 1932, can be found amongst the estate of Hernâni Cidade. Biblioteca Nacional de Portugal, Arquivo de Cultura Portuguesa Contemporânea, Espólio de Hernâni Cidade - E36/cx.11

<sup>146</sup> ANTT, AOS, PC-3 cx. 596, pt. 2: Proibição do Comandante Paiva Couceiro residir em território nacional, na sequência de acusações feitas à política do Governo relativa a Angola. On Paiva Couceiro, see Valente, Vasco Pulido (2006), *Um Herói Português: Henrique Paiva Couceiro*, Lisboa, Alêtheia and Meneses, Filipe Ribeiro de (2011), *Paiva Couceiro. Diários, Correspondência e Escritos Dispersos*, Lisbon, Publicações D. Quixote.

<sup>147</sup> Actually, Paiva Couceiro’s letter partially transpired for the printed media that were accessible to common people as Salazar issued a press release regarding Paiva Couceiro’s expulsion. The patriotism of the author was questioned.

as well as colonised and coloniser people. Portugal would not sell, lease, or share any portion of the colonial empire to any other country because they were not a mere property but rather constitutive part of the nation. As Salazar's proclaimed after the rumours concerning the ninety-nine lease of Angola to Germany, a transaction would not be permitted by 'the Portuguese constitutional laws; and even if it were not for such texts, it would not be allowed by our national consciousness'.<sup>148</sup> The idea that Portugal could accept a compensation in return of a piece of its Empire was unconceivable – or, as the missionary and Priest Alves da Costa dramatically put it, it was not less odd and repulsive than imagining a 'living man accepting a compensation so that someone chop any of his body parts off'.<sup>149</sup> Metropole and colonies were thus one flesh.

The sacred union between metropole and colonies was presented as the result of the distinctive process of foundation and consolidation of the Portuguese empire in contradistinction to the foundation of the other European powers' empires. In the words of the minister of Colonies between May 1935 and January 1936, José Ferreira Bossa, Portugal was not 'amongst the nations to which the treaty of Berlin [of 1885] distributed colonies'. The empire had been discovered and conquered five centuries before, being the result of the entire Portuguese people, 'from the king to the sailor and the soldier', which invested their entire energies and strengths in the creation of this common enterprise.<sup>150</sup> This investment, it was argued, had bore fruit among the colonised peoples, which had been 'infected' by the same love and loyalty to Portugal. In this sense, in late September, the colonial propaganda agency disseminated a communiqué reporting that Portuguese indigenous working in Leopoldville had spontaneously organised a demonstration of support in front of the Portuguese consulate after hearing rumours about the partition of the Portuguese colonies, waving flags and offering themselves to fight for the defence of Angola.<sup>151</sup> The instrumentalisation of the ostensible voluntary action of the colonised in favour of the coloniser as a proof of the

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<sup>148</sup> Salazar, António de Oliveira, *Discursos e Notas Políticas*, vol. III, Coimbra, Coimbra Editora, pp. 257-263

<sup>149</sup> Quoted in Cunha, Augusto (1938), 'Crónica colonial', *Boletim Geral das Colónias*, XIV, 152 (February 1938), p. 69.

<sup>150</sup> *Diário de Notícias*, 22<sup>nd</sup> August 1935, p. 1.

<sup>151</sup> *Boletim Geral das Colónias*, 125 (October 1935), pp. 89-90.

entrenchment of the Portuguese colonial power had already been invoked by the minister of Colonies, which used an interview in the widespread *Diário de Notícias* as an opportunity to publicise a telegram received from Bissau reporting that ‘indigenous peoples from all races’ had reunited in front of the governmental palace to acclaim Portugal.<sup>152</sup> The Portugueseness of the Africans showed that Portugal and the empire were ‘one and indivisible’.

Also, the relationship between the metropole and colonies was different from the other colonial powers. In declarations to the Belgian daily *La Nation Belge*, Minister of Colonies Francisco Vieira Machado (1936-1944) stressed this distinction: when directly asked whether Portugal would be open to cede part of its empire to appease any other European power, the minister rebuffed the suggestion, adding that ‘our colonies, as our metropolitan provinces, form a whole: they are the Portuguese overseas provinces’.<sup>153</sup>

Similar formulations were reproduced in the printed media. To the critic voices that argued that Portugal’s needs were lower than what its immense colonies could offer if submitted to more efficient rulers, the editor of the weekly *Vida Colonial* replied that Portugal did not have colonies, being an ‘harmonious compound that consists in provinces, either metropolitan or in the overseas’.<sup>154</sup> To the advocates of appeasing German expansionist ambitions at the expenses of the Portuguese colonies, Vasco Borges replied in one of its opinion articles in the widely read *Diário de Notícias* that ‘there is no Portugal in Europe and Portuguese colonies at various points of the globe’ but rather an ‘united Portugal spread by four of the five parts of the world’, with the overseas provinces being as Portuguese as the metropolitan ones.<sup>155</sup> As a *Diário de Notícias*’s editorial suggestively titled ‘Everybody wants colonies’ put it:

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<sup>152</sup> *Diário de Notícias*, 22<sup>nd</sup> August 1935, p. 2.

<sup>153</sup> Transcribed in *Diário de Notícias*, 27<sup>th</sup> July 1938, p. 1.

<sup>154</sup> *Vida Colonial*, 27<sup>th</sup> February 1936, p. 13.

<sup>155</sup> ‘Não há Portugal na Europa e colónias de Portugal em vários Pontos do globo. O que consta nos mapas políticos é um Portugal uno repartido por quarto das cinco partes do Mundo. A Índia, Timor, Angola e Moçambique são terras nossas e tão portuguesas como as da Estremadura, Alentejo e Algarve.’, *Diário de Notícias*, 7<sup>th</sup> December 1937, p. 1. According to the cosmovision at the time, Timor belonged to Oceania rather than Southeast Asia as in the nowadays geopolitical conception of Oceania. From the rhetorical point of view, this allowed the affirmation that Portugal had been in all the five continents and was still in four of them.

The overseas territories over which our flag floats (...) are not *colonies*, except as a land inhabited and tilled by settlers (*colonos*) in Latin meaning of the word (...); they are rather *overseas provinces*, equal to Minho or to Algarve, and [are] inseparable from the integrity of Nation. Despite not being named like this in our constitutional statute, nor in the Colonial Act, it is no less true that they are [overseas provinces], in the light of our tradition and of devotion to the blood that we honourably and enthusiastically lost there.<sup>156</sup>

This idea of similarity between metropolitan and colonial provinces, which was often mentioned in the comments and analysis during the emergence of new rumours regarding the redistribution of the Portuguese colonies in Africa, encloses a conception of Portugal as a country without colonies but rather overseas provinces. The notion of unity of the nation, as well as its evolution within the *Estado Novo*'s first decades will be the subject of the following chapter.

This chapter has explored the impact of the fear of a repetition of a humiliating partition of Africa, tracing the responses to international rumours about foreign interest in the Portuguese colonies, in particularly Angola, on the eve of the Second World War. Like the debates about the persistence – or not – of forms analogous to slavery in the Portuguese colonies in the early 1930s explored in chapter 1, the perceived new scramble for Africa fomented national synergy against the foreign enemy, enhancing the sense of national identity. The affirmation of Portugal's rights to continue its colonising role was predicated on the historical singularity of the Portuguese empire, founded on the ground as a consequence of the Portuguese people's heroic effort rather than at the desk of diplomatic negotiations between men with a theoretical knowledge of colonial realities only. Simultaneously, rumours were seized by *Estado Novo*'s political power as an opportunity to stress the regime's nationalism and its economic

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<sup>156</sup> 'Os territorios ultramarinos sobre que flutua a nossa bandeira (...) não são *colónias* senão como terras habitadas e lavradas por *colonos*, no significado latino da palavra, mas sim (...) *províncias* do Ultramar, iguais ao Minho ou ao Algarve e irradicáveis da integridade da Nação. Se assim não se denominam no nosso estatuto constitucional, nem sobretudo no Acto Colonial, não é menos verdade que o são, à luz da nossa tradição e à fé do sangue que nelas temos vertido honrosa e entusiasticamente.' *Diário de Notícias*, 21<sup>st</sup> December 1938, p. 1.

and political advances regarding national and colonial policies, which created unprecedented conditions for the defence of Portugal's geopolitical status as a great multi-continental colonial power instead of a little European country.

### 3. A GREATER PORTUGAL: PORTUGAL AND THE EMPIRE AS A POLITICAL UNIT

Although Colonial Act had been introduced as a provisional addendum to the 1911 Constitution, it remained effective until 1951. At the time of its promulgation in 1930, it was argued that the urgency of colonial affairs asked for an immediate reform. Colonial affairs could not wait for the new regime's upcoming constitution that would replace the legal diploma in force, which was still based upon the principles of the overthrown First Republic. Purportedly Colonial Act would be discussed in a future Constituent Assembly and integrated in the new fundamental law of the nation, to be drafted as soon as possible. Nevertheless, when the Constitution that officially brought in *Estado Novo* was promulgated in 1933, it simply referred to the Colonial Act as having the same value than the constitution when it came to colonial affairs, without incorporating its provisions in the text.<sup>1</sup> Minor changes were introduced to the Colonial Act when the constitution was promulgated, again in 1935 and, alongside with a first constitutional revision, also in 1945. Nonetheless, the constitutional dualism persisted for two decades.

Meanwhile, Portugal and its continuity as a colonial power faced new challenges as the international setting had significantly changed since Colonial Act was first

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<sup>1</sup> Article 132, 'Constituição Política da República Portuguesa', Decree 22.241, *Diário do Governo, Suplemento*, 22<sup>nd</sup> February 1933. It came into force a few weeks later, after being submitted to a plebiscite in mid-March, see *Diário do Governo, Suplemento*, 11<sup>th</sup> April 1933.

promulgated. Attitudes towards colonialism had been transformed, triggering the process of decolonisation after the Second World War. The defeat of right-wing, expansionist totalitarian regimes in the conflict and the wave of democratisation that followed impacted both the colonised and the colonisers' stances on imperial policies and on racial and cultural distinctions within empires. The United Nations Organisation had been created in 1945: Portugal's membership was vetoed by the Soviet Union until 1955 but the wings of change of anti-colonialism inspired by the Afro-Asian and Non-Aligned blocks were felt beyond the organisation.

In this unfavourable context, the incorporation of all the parts of the nation under the same constitutional text was followed by a change of terminology concerning the colonial territories to forge national unity. Colonial Act had firmly determined that 'the overseas dominions of Portugal are called *colonies* and compose the *Portuguese Colonial Empire*'.<sup>2</sup> In 1951, both expressions were effaced from the Constitution, being replaced by expressions that were considered more suitable to the current circumstances. Henceforth the 'overseas territories of Portugal (...) are generically called *provinces*', mirroring the designation of the metropolitan administrative divisions.<sup>3</sup> The Portuguese colonial empire was now loosely renamed as 'the Overseas'. Likewise, the Ministry of Colonies and its advisory body, the Council for the Empire Colonial (*Conselho do Império Colonial*), were replaced with the Ministry of the Overseas and the Overseas Council, respectively.<sup>4</sup> Shortly after, the colonial propaganda agency, the General-Agency for the Colonies, was also renamed as General-Agency for the Overseas.<sup>5</sup>

The alteration of the terminology had already been advocated on the occasion of the first constitutional revision of *Estado Novo* in 1945. The idea that 'colony' had become an internationally dangerous word had emerged during the discussions held in

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<sup>2</sup> Third Article, Decree 18.570, *Diário do Governo*, 8<sup>th</sup> July 1930.

<sup>3</sup> Note also the substitution of 'dominions' for the neutral 'territories'. Article 134<sup>th</sup> of the renewed constitution Law 2.048, *Diário do Governo, Suplemento*, 11<sup>th</sup> June 1951. The division of the metropolitan territory in provinces with an actual administrative function had been re-introduced by the Administrative Reform in 1936. See *Código Administrativo - 1936*, Lisboa, Empresa Jurídica Editora.

<sup>4</sup> Decree 38.300, *Diário do Governo*, 15<sup>th</sup> June 1951.

<sup>5</sup> Portaria 13.593, *Diário do Governo*, 5<sup>th</sup> July 1951.

both chambers of the parliament. The members of the Corporative Chamber (*Câmara Corporativa*), which had a mere consultative role,<sup>6</sup> advised the change of terminology on the basis that the expression ‘overseas provinces was more harmonious with the nature of the Portuguese Empire’.<sup>7</sup> In a similar vein, in the National Assembly (*Assembleia Nacional*), the increasingly emasculated chamber that purportedly had legislative power,<sup>8</sup> deputy Joaquim Saldanha defended that the term ‘colonies’ gave the wrong idea that these territories were not an integrant element of the nation to which they belonged, which did not correspond to the Portuguese reality or tradition. He added that the word ‘colonies’ had been introduced in the Portuguese lexicon only very recently, stressing that it was not the designation used ‘at the time of the discovery of the seas, which we opened to the world’.<sup>9</sup> Hence the expression did not translated the true imperial spirit of the Portuguese colonial endeavour.

In fact, similar suggestions had already been made during the 1944 Congress of National Union (*União Nacional*), the *Estado Novo*’s single party.<sup>10</sup> As the idea for an impending constitutional revision began to materialise, two unsuspected congressmen, José Ferreira Bossa and Francisco Leite Duarte, defended the renaming of the Portuguese colonies. Their engagement with the state apparatus went further than being active members of the National Union. In 1944, José Ferreira Bossa was the General-Secretary of Colonies. He had formerly been the Under-Secretary of State for the

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<sup>6</sup> On *Estado Novo*’s Corporative Chamber, see Ferreira, Nuno Miranda (2009), *A Câmara Corporativa no Estado Novo: Composição, Funcionamento e Influência*, Lisbon, Instituto de Ciências Sociais – Universidade de Lisboa (unpublished doctoral dissertation).

<sup>7</sup> Câmara Corporativa - Parecer sobre a proposta de lei nº110 (Alterações à Constituição e ao Acto Colonial), *Diário das Sessões da Assembleia Nacional*, 16<sup>th</sup> June 1945 (Supplement to n.176), p. 21.

<sup>8</sup> In reality, the legislative power belonged to the government only. On the National Assembly during *Estado Novo*, see Castilho, José Manuel (2007), *A Assembleia Nacional (1934-1974)*, Lisbon, Instituto de Ciências do Trabalho e da Empresa (unpublished doctoral dissertation).

<sup>9</sup> Intervention of Joaquim Saldanha on 3<sup>rd</sup> July 1945, *Diário das Sessões da Assembleia Nacional*, 4<sup>th</sup> July 1945, p. 725.

<sup>10</sup> On *União Nacional*, see Cruz, Manuel Braga (1988), *O Partido e o Estado no Salazarismo*, Lisbon, Editorial Presença. See also Pinto, António Costa (2000), *The Blue Shirts. Portuguese Fascists and the New State*, New York, Columbia University Press, ch. 4, pp. 131-160.

Colonies and, during a brief period between 1935 and 1936, Minister of Colonies.<sup>11</sup> Ferreira Bossa feared that the Portuguese civilising mission could be confused with the type of imperialism that led to the Second World War, if the concept of colonial empire was not suppressed from the Constitution.<sup>12</sup>

In his turn, Francisco Leite Duarte was close to two former ministers of Colonies, Armindo Monteiro and Francisco Vieira Machado, with whom he had worked before Salazar's rise to power. Well-connected, he had been nominated vice-governor of the Bank of Angola in 1930, immediately after the crisis that had been at the origin of Salazar's brief passage through the Ministry of Colonies and the promulgation of the Colonial Act. In Leite Duarte's opinion,

colonies as the designation for the overseas dominions, as well as grouping these [dominions] into a 'Portuguese Colonial Empire', is neither consistent with the Nation's political tradition for the colonies, nor with the fundamental principles of the juridical construction of the Portuguese State and the Colonial Act itself; it is neither [consistent] with the doctrines professed by the Chief [of Government] and followed by the National Union, nor with the general sentiment and determination clearly expressed by the Portuguese people born or resident in the Overseas.<sup>13</sup>

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<sup>11</sup> A short note on the Portuguese governmental structure at the time: an under-secretary of state was a 'junior minister', dependent on the minister; a general-secretary was the head of an administrative department that assisted a ministry (both the minister and the under-secretaries of state). Technically, a general-secretary was hierarchically inferior to the Minister and the under-secretary or under-secretaries of State; in reality, the hierarchy was not always as clear. For instance, the general-secretary of the Ministry of Foreign Affairs, Teixeira Sampaio, who kept his post from 1929 until his death in 1945, was the one really running the ministry of Foreign Affairs in direct dialogue with Salazar. See Pereira, Bernardo Futscher (2012), *A Diplomacia de Salazar (1932-1949)*, Lisbon, Publicações D. Quixote, pp. 32-33.

<sup>12</sup> The communications concerning colonial affairs were later transcribed in the colonial propaganda agency's journal. Bossa, José Ferreira (1945), 'Organização Política das Províncias Ultramarinas' in *Boletim Geral das Colónias*, 235 (January 1945), p. 39.

<sup>13</sup> 'Colónias, como designação dos domínios de Além-mar, bem como o agrupamento destes em um 'Império Colonial Português, não aparecem conforme nem com a tradição política colonial da Nação, nem com os princípios basilares da construção juridical do Estado Português e do próprio Acto Colonial, nem com as doutrinas professadas pelo Chefe e seguidas pela União nacional, nem, por ultimo, com o geral sentimento e vontade claramente manifestadas pelos portugueses nascidos ou residents nos domínios do ultramar.' Duarte,

The fact that some voices within the governmental sphere of influence insisted on the importance of changing the terms in use did not influence the outcome of the first constitutional revision in 1945. At the time, the suggestion was not only ignored but also suppressed from the version of Corporative Chamber's report published in the press.<sup>14</sup> Yet, the government's attitude changed in 1951. According to the preamble of the project of law for the constitutional revision presented to the National Assembly, the time had come to revert the designation introduced by the Colonial Act, abandoning the designations 'colonies' and 'colonial empire', which – it was argued – had not been embraced by the Portuguese. The government had solely introduced more discipline and more rigor but neither 'the attitude and feelings of the nation towards the overseas territories and peoples' nor 'the core lines of governmental methods' had been transformed under the new designations introduced by decree twenty years earlier. For that reason, the former terminology – 'overseas provinces' – had persisted not only in the common use but also in the literature and in some legal texts in force.<sup>15</sup> Following this line of reasoning, the Portuguese colonies had never been 'colonies' *de facto*; 'colony' was just a form of speech that could be filled with different contents: the use of the form 'colonies' in Portugal did not imply the adoption of practices implemented by other colonial powers.

The idea that the reappearance of the former terminology in the revised Constitution of 1951 was as a mere formality to adjust words to the singular Portuguese imperial experience was repeated by the printed media, which enthusiastically praised the alteration. *Diário de Notícias* claimed that 'colony' had acquired a pejorative meaning in the international context, referring to 'a concept that in no way corresponds to the Portuguese reality'. 'Overseas provinces' was not a mere expression, a mere phrase, rather translating an entirely different concept of colonisation that was deeply

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Francisco Leite (1945), 'A posição dos domínios ultramarinos no estado português' in *Boletim Geral das Colónias*, 236 (February 1945), pp. 142-143

<sup>14</sup> See, for instance, *O Século*, 20<sup>th</sup> June 1945, p. 2, and *Diário da Manhã*, 22<sup>nd</sup> June 1945, pp. 3-4.

<sup>15</sup> *Diário das Sessões da Assembleia Nacional*, 19<sup>th</sup> January 1951, p. 289.

rooted in the thinking of Portuguese colonialist elites.<sup>16</sup> *O Século* also emphasised that ‘we have a concept of Empire, but we are not an imperialist country’ in the sense of exploitation and subjugation associated with the term ‘imperialism’ abroad. According to the article, traditionally, Portugal had not predicated its colonial power on these processes of violent domination and the expressions reintroduced by the constitutional revision would clarify this national specificity.<sup>17</sup>

To be sure, the decision was not unanimously applauded. Although the members of National Assembly welcomed the decision, this time the members of the Corporative Chamber were not equally enthusiastic.<sup>18</sup> In general, the Corporative Chamber in 1951 was favourable to substitute ‘overseas provinces’ for ‘colonies’ in order to counter international pressures for the disintegration of European colonial empires: ‘it is important that Portugal solemnly reaffirm the doctrine so often proclaimed that metropole and colony form one territory, one nation, one state.’<sup>19</sup> Nevertheless, its members preferred a neutral expression: ‘overseas territories’. It was argued that colonies and metropolitan provinces referred to very different realities and it was premature to homogenise what was different in its essence. Since it would still require a long time to blur these differences, the corporative chamber admitted the possibility of adopting different designations for different territories.<sup>20</sup>

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<sup>16</sup> Obviously, the terms ‘colonisation’ and ‘colonialist’ were not used in the editorial article, being substituted by their substitutes in the renew rhetoric. *Diário de Notícias*, 24<sup>th</sup> January 1951, p. 1.

<sup>17</sup> *O Século*, 28<sup>th</sup> May 1951, p. 16.

<sup>18</sup> Only a small number of the Corporative Chamber members – the so-called *procuradores* – discussed each submitted proposal. Although some members of the Corporative Chamber during the III Legislative Session, which had recommended the replacement of colonies with overseas provinces in 1945, were still part of the chamber in the V Legislative session, the ones who discussed the proposed alterations in 1951 were not the same.

<sup>19</sup> ‘Importa que Portugal afirme solenemente uma vez mais a doutrina tantas vezes proclamada de que metropole e colónias formam um só território, uma só Nação, um só Estado.’ Câmara Corporativa - Parecer 10/V, *Diário das Sessões da Assembleia Nacional*, 19<sup>th</sup> January 1951, p. 295.

<sup>20</sup> While India would keep its traditional designation of State (*Estado*), Angola and Mozambique would be renamed as General Government (*Governo-Geral*, as the designation applied to Brazil from the mid-sixteenth to mid-seventeenth centuries), and the remaining colonies could become autonomous provinces (*províncias autónomas*). Câmara Corporativa - Parecer 10/V, *Diário das Sessões da Assembleia Nacional*, 19<sup>th</sup> January 1951, p. 297.

Amongst the chamber's members, there were also opponents to any change of the terminology in use. Armindo Monteiro, the first minister of Colonies of *Estado Novo* and main ideologue of the new regime's galvanised imperial thought, vehemently contested the suppression of 'colonies' and 'Portuguese colonial empire' from the constitution. In his written explanation of vote, Monteiro explained his disappointment with the wording proposed by the government. In his view, 'Empire' was an aggrandising designation that had been inspiring the Portuguese souls in the last twenty years and was at the heart of the Portuguese nationalism. His main concern was the idea of assimilation associated with the term 'province', though. For Armindo Monteiro, the generalisation of 'province' was contrary to the idea of hierarchical solidarity between different parts of the empire at the heart of the regime's conceptualisation of Nation, moving away from what he perceived was the Portuguese tradition.<sup>21</sup>

Another member of the Corporative chamber that opposed to the adoption of 'overseas provinces' was Marcelo Caetano. The future successor of Salazar at the helm of *Estado Novo* had formerly been minister of Colonies (1944-1947) and Chairman of the Executive Committee of the National Union (1947-1949). In 1951, he was president of the Corporative Chamber, already appearing in some circles as a possible alternative to Salazar. Caetano did not submit any written explanation of vote to the chamber. But his opinion was well known, though. He had made his position clear in his *Portugal e o Direito Colonial Internacional [Portugal and the International Colonial Law]*, which had been published as a textbook for his lectures on Colonial Administration and Law at the University of Lisbon a couple of years before.<sup>22</sup> In Caetano's opinion, 'only in literature or sentimentally, one can say that Angola and Timor are Portuguese provinces as the Algarve and Minho'. His point of view had hardly changed in just three years time. In 1951, he published a short book about the traditions, principles and methods that guided the Portuguese colonisation. With a wider public in view, it was accepted for publication by the colonial propaganda agency in early February (i.e. before the constitutional revision). Caetano used the expression 'Portuguese colonies' throughout

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<sup>21</sup> Câmara Corporativa - Parecer 10/V, *Diário das Sessões da Assembleia Nacional*, 19<sup>th</sup> January 1951, p. 313.

<sup>22</sup> Caetano, Marcelo (1948), *Portugal e o Direito Colonial Internacional*, Lisbon, Oficinas Gráficas Casa Portuguesa.

and implicitly criticised the expression ‘overseas provinces’ due to its association with the liberal policies that follow the establishment of the constitutional monarchy.<sup>23</sup> From his point of view, the distance between metropole and colonies was not only geographical but primarily civilisational. The civilising mission was still work-in-progress, precluding the adoption of identical rules in all the Portuguese territories.<sup>24</sup> Furthermore, the example of France, which had replaced ‘*Empire Français*’ and ‘colonies’ with ‘*Union Française*’ and ‘*départements et territoires d’outre-mer*’ in its Constitution in 1946, was presented as evidence that ‘African colonies did not change at all by the fact that, constitutionally, they became called «overseas territory»’. Therefore, according to Marcelo Caetano, the French had undertaken a mere ‘verbal reform’.<sup>25</sup>

The 1951 terminological change in Portugal might in fact invite a comparison with the precedent French one. However, it is important to keep in mind three significant differences related with the alterations introduced by the French Constitution of 1946 and the Portuguese constitutional revision of 1951. First, while the change of terminology in the Constitution in France was complemented with the abolition of the system of *indigénat*, in Portugal a similar system of differentiation, the *indigenato*, persisted after the constitutional revision.<sup>26</sup> Even though the generalisation of citizenship

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<sup>23</sup> Oddly, since the book came out already after the constitutional revision, it was published by the recent renamed General Agency for the Overseas. Caetano, Marcelo (1951), *Colonizing Traditions, Principles, and Methods of the Portuguese*, Lisbon, Agência Geral do Ultramar, especially pp. 37-38. The Portuguese original was published at the same time under the title *Tradições, princípios e métodos da colonização portuguesa* and a French translation was also published on the same year.

<sup>24</sup> Caetano, Marcelo (1948), *Portugal e o Direito Colonial Internacional*, op. cit., p. 14

<sup>25</sup> Caetano, Marcelo (1948), *Portugal e o Direito Colonial Internacional*, op. cit., p. 203.

<sup>26</sup> On the French change of terminology, see Devèze, Michel (1948), *La France d’Outre-mer: de l’Empire colonial à l’Union française, 1938-1947*, Paris, Hachette. For an overview, see Robert Aldrich and John Connell (1992), *France’s Overseas Frontier: Départements et Territoires D’outre-mer*, Cambridge, Cambridge University Press; Frémeaux, Jaques (2004), ‘L’Union française: le rêve d’une *France Unie*?’ in Blanchard, Pascal e Sandrine Lemaire (eds.), *Culture impériale. Les colonies au cœur de la République, 1931- 1961*, Paris, Éditions Autrement, pp. 163-175. See also Cooper, Frederick (2007), ‘Provincializing France’ in Ann Laura Stoler, Carole McGranahan and Peter C. Perdue (eds.), *Imperial Formations*, Santa Fe, School for Advanced Research Press, ch. 11, pp. 341-377, Cooper, Frederick (2009), ‘Citizenship and the Politics of Difference in French Africa, 1946-1960’, Harald Fischer-Tiné and Susanne Gehrman (eds.), *Empires and Boundaries. Rethinking Race, Class, and Gender in Colonial Settings*, New York- London, ch. 6, pp. 107-128, Cooper, Frederick (2014), *Citizenship*

in the French colonial empire did not immediately become effective and alternative mechanisms to preserve metropolitan primacy were created at the same time the *indigénat* was being abolished on paper, in Portugal a similar measure was not considered at the time.<sup>27</sup> The Statute of Indigenous Populations (*Estatuto do Indigenato*) remained in force, shaping differences between citizens and native subjects until 1961 (i.e. until the outbreak of Angola's War of Liberation precipitated the metropolitan government into eliminate it). Therefore, the supposed inclusiveness brought in by the expression 'overseas provinces' was not reflected in the extension of inclusiveness to their populations. The existing differential regime was not affected, sustaining the distinction between Portuguese nationals and Portuguese citizens. As before the constitutional revision in 1951, African people from Angola, Guinea, and Mozambique could only become citizens – i.e. *assimilados* – if they spoke, read, and wrote Portuguese, if they had a profession or other form of fixed income, if they revealed a 'good behaviour' and had adopted Portuguese cultural habits, and if they also had a clean military record. As before the constitutional revision in 1951, neither non-African people in these three colonies nor people – of any ethnic background – from the metropole or the remaining five colonies had to comply with similar educational, cultural, financial, and political requirements to access citizenship.<sup>28</sup>

Second, the French assembly at the time of the change of wording regarding the colonies included future celebrated African leaders such as Léopold Senghor from Senegal or Félix Houphouët-Boigny from Cote D'Ivoire amongst its members. The number of deputies from the colonies in proportion to their population, as well as the criteria of inclusion and exclusion from citizenship that affected the votes in their election, recalls how the notion of democracy was narrow at the time. The voices of the

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*between Empire and Nation: Remaking France and French Africa, 1945–1960*, Princeton and Oxford, Princeton University Press.

<sup>27</sup> On the *indigénat*, see Merle, Isabelle (2002), 'Retour sur le régime de l'indigénat: genèse et contradictions des principes répressifs dans l'empire français', *French Politics, Culture, and Society*, 20 (2), pp. 77-100; Merle, Isabelle (2004), 'De la «légalisation» de la violence en contexte colonial. Le régime de l'indigénat en question', *Politix*, 17 (66), pp. 137-162. See also Cooper, Frederick (2009), 'Citizenship and the Politics of Difference in French Africa, 1946-1960', *op. cit.*

<sup>28</sup> From 1954, reading and writing was no longer required to switch from indigenous to citizen but the other conditions were preserved. Decree 39.666, *Diário do Governo*, 20<sup>th</sup> May 1954. Out of curiosity, about 40% of the metropolitan population was illiterate in 1950.

colonised people in the debate on the designation of their territories and their capacity to shape the political concepts associated with the words were limited. In the case of Portugal too, the sub-representation of the colonies in the National Assembly was a reality. From 1945 to the outbreak of the colonial war in Angola and unilateral incorporation of the Portuguese India into the Republic of India in 1961, only 13 of the 120 parliament members were in representation of the overseas territories.<sup>29</sup> Often parliament members in representation of the colonies were not born or lived in the territories they represented – moreover, with some exceptions of the constituency of the Portuguese State of India, the deputies who were born in the colonies were of European origin.<sup>30</sup> Not less significant, is the fact that, unlike France, Portugal was not a democracy at the time of the constitutional revision. Civil and political rights and freedoms guaranteed in the Constitution for every citizen existed only on paper even in the metropole. Therefore, the parliament in which the constitutional revision was discussed was not only powerless but also the result of unfree elections. It was thus dominated by a white elite from *Estado Novo's* single party, in which the pluralism of ideas by the early 1950s was minimal, converging to the same central values and support of the regime.

Finally, despite facing similar international pressures for decolonisation, the internal context in France and in Portugal at the time of the suppression of the expression 'colony' and 'colonial empire' from the respective constitutions was not comparable. The transition from the French Colonial Empire into a multinational, multiracial French Union took place at the time of foundation of a new regime after the German occupation during the Second World War, a conflict in which African and Maghrebian troops played a key role side by side with their metropolitan counterparts and the government of Free France sought refuge in Alheria. Therefore, the transformation of imperial discursive formations with the birth of the French Fourth Republic occurred in a wider context of rupture. In contradistinction, the change of terminology in Portugal in 1951 occurred in a context of continuity within an

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<sup>29</sup> Castilho, José Manuel (2007), *A Assembleia Nacional (1934-1974)*, op. cit., p. 106.

<sup>30</sup> On the geographical origin of the parliament, see Castilho, José Manuel (2007), *A Assembleia Nacional (1934-1974)*, op. cit., pp. 174-177. See also Carvalho, Rita Almeida (2001), 'A Elite Parlamentar no pós-guerra (1945-1949)', *Penélope*, 24, pp. 7-30.

established regime. In truth, after almost 25 years in office, the President of the Republic Marshall Óscar Carmona, actually died during the 1951 constitutional revision, generating a crisis between a conservative and militarist faction, a reformist faction led by Marcello Caetano and also a monarchist faction, which envisaged a replication of Franco's Spain model. After Salazar took over the portfolio of Defence in 1936 – and thus increasing the control over Marshall Carmona's usual support base –, the President of the Republic became no more than a nominal leader, supporting the Prime-minister and being deprived of real political power and initiative. Yet, the anti-Salazar discontent within part of the officer corps increased after the Second World War. With the death of Marshall Carmona, the military had become a serious threat.<sup>31</sup> However, at the end there was little change in the regime. Marshall Carmona's successor, General Craveiro Lopes, was chosen by Salazar to be nominated as the National Union's presidential candidate, running in an election in which at the end he was the only candidate.<sup>32</sup> Craveiro Lopes attempted to have a more active role and came into collision with Salazar due to the government's control of his actions and speeches but he did not get any result from his contestation apart from not being suggested for a second term in office. Furthermore, there was little renovation of the governmental elite. Salazar's control over his cabinet members was tight. Although Salazar proceeded to minor cabinet reshuffles every three or four years, the base of recruitment was limited.<sup>33</sup> Often, under-secretaries of state became ministers or remained in their positions after the replacement of the ministers, which also contributed to reinforce the stability of policies.

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<sup>31</sup> On Salazar's difficult relationship with the military, see Faria, Telmo (2000), *Debaixo de Fogo! Salazar e as Forças Armadas (1935-41)*, Lisbon, Cosmos – Instituto de Defesa Nacional, and Rosas, Fernando (2013), *Salazar e o Poder. A Arte de Saber Durar*, Lisbon, Tinta da China, pp. 212-221. On the 1951 crisis, see also Meneses, Filipe Ribeiro (2009), *Salazar. A Political Biography*, New York, Enigma Books, especially pp. 409-418.

<sup>32</sup> The Communist Party's candidate was not allowed by the Supreme Court and Quintão de Meirelles, who gathered supported from a conservative elite displeased with Salazar's governance, was lead to withdrew due to the lack of freedom to run his campaign. On the 1951 election, see *Eleições presidenciais de 1951: e correspondência entre Oliveira Salazar e Craveiro Lopes*, Lisbon, Comissão do Livro Negro Sobre o Regime Fascista - Presidência do Conselho de Ministros,

<sup>33</sup> For an overview on Salazar's ministerial control and the lack renovation of the political elite, see Pinto, António Costa (2000), 'O Império do professor: Salazar e a elite ministerial do Estado Novo (1933-1945)', *Análise Social*, 157, pp. 1-22.

Was, thus, the change of terminology regarding the colonies in 1951 just a ‘verbal reform’, as Marcelo Caetano had argued in his book to belittle the French alterations in 1948? Did it translate different ways of imagining the nation as a composite of territories in different geographical locations, as Armindo Monteiro feared during the discussion of the proposal? Although not every word is a social or political concept<sup>34</sup> many contributors to the discussion about the most appropriate terms for the Portuguese colonies seemed convinced that the replacement of ‘colony’ with ‘overseas provinces’ had a wider political meaning, translating different methods of governing and thus should be carefully used according to the Portuguese realities in the territories to which they referred.

In the following, I will explore the perceived meanings associated with the words ‘colony’ and ‘overseas provinces’ and their implications on the ideas of nation and national unity. What was thus at stake in the substitution of ‘overseas provinces’ for ‘colonies’ in the constitutional text? Or, from a different point of view, what had been at stake in the 1930 decision to include a provision that fiercely defined how the colonies should be designated in the first place? What was the content assigned to each form of wording? Also, both supporters and opponents of the change of terminology in 1945 and 1951 invoked the Portuguese tradition of colonising to justify their position. Traditions, as immemorial and constant they might seem or claimed to be, are social constructions of a certain time and do not remain static.<sup>35</sup> What was then the referred ‘Portuguese tradition’ of naming the colonies – if there was one Portuguese tradition of naming the colonies – and what was the origin of a specific way of naming the colonies? What was in a name?

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<sup>34</sup> Koselleck, Reinhart (1982), ‘Begriffsgeschichte and Social History’, *Economy and Society*, 11 (4), p. 418.

<sup>35</sup> Eric Hobsbawm and Terence Ranger’s edited volume on invented traditions is now an inevitable reference. Hobsbawm, Eric and Terence Ranger (eds) (1983), *The Invention of Tradition*, Cambridge, Cambridge University Press.

### 3.1. Between colonies and overseas provinces: the importance of a good name

In the 1930s and 1940s the Portuguese word for colony – *colónia* – encompassed a myriad of meanings beyond the now more common association with dependent overseas territories under the political control of a metropolitan state. Closer to its Latin etymological origin (from *colere*, cultivate), *colónia* was part of the designation of the first agricultural settlement for poor farmers in the metropolitan territory created in 1925. *Colónia penitenciária* or *colónia penal* were also the common designation for prisons, either in the metropole or in the colonies. Moreover, *colónia* was also used as a synonym to community of emigrants. This multiplicity of meanings of the word ‘colony’ is not a Portuguese national specificity. As Ann Laura Stoler and Carole McGranahan noted, they are a reminder of the link between a wide range of forms of social experimentation across empires (overseas and continental ones, alike).<sup>36</sup> The national peculiarity here might lie in the fact that, although ‘colonies’ was the most customary expression to designate the territories under Portuguese sovereignty in Africa and Asia and the word itself was part of the designation of the ministry responsible for their administration,<sup>37</sup> in 1930 Colonial Act was seen as the first legal text with constitutional value in which the term ‘colony’ was actually used to label the Portuguese colonies, generating a storm of criticism.

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<sup>36</sup> Ann Laura Stoler and Carole McGranahan (2007), ‘Introduction: Refiguring Imperial Terrains’ in Ann Laura Stoler, Carole McGranahan and Peter C. Perdue (eds.), *Imperial Formations*, Santa Fe, School for Advanced Research Press.

<sup>37</sup> The ministry of Colonies had been created in 1911. Before becoming an autonomous ministry, the Ministry of the Navy and Overseas had already gave place to a Ministry of Navy and Colonies, created by the provisional government after the establishment of the Republic. See Decree from 8<sup>th</sup> October 1910, *Diário do Governo*, n. 4, 10<sup>th</sup> October 1910.

### 3.1.1. The Portuguese constitutional tradition before 1930

The first Portuguese Constitution was issued in 1822. It defined the Portuguese Nation as the union of all Portuguese people in both hemispheres and both metropolitan and overseas provinces were listed alike, arranged by continent but without any other element of distinction.<sup>38</sup> The colonies of the so-called United Kingdom of Portugal, Brazil, and the Algarves were referred to as ‘overseas provinces’.<sup>39</sup> The Constituent Assembly adopted this expression from the very first moment. Within the spirit of the liberal revolution that brought in the Constitutional Monarchy, the governmental pronouncement that convened the Constituent Assembly already classified ‘colonies’ as an ‘insulting name’ which fortunately had been ‘extinguished forever’.<sup>40</sup> The designation ‘colony’ was unquestionably considered offensive. Yet, the ideas and expectations associated with the phrase ‘overseas provinces’ were not homogeneous.

In the words of Bento Pereira do Carmo, a member of the Constituent Assembly in representation of the metropolitan province of Estremadura, the aim of the Constitution was ‘to preserve the integrity of the Portuguese Empire in both hemispheres, strengthening blood ties and interests which mutually connect all the Portuguese people in the four parts of the Globe.’<sup>41</sup> Blood ties would be undermined if

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<sup>38</sup> Article 20<sup>th</sup>. *Constituição Política da Monarchia Portuguesa*, 1822, Lisbon, Imprensa Nacional.

<sup>39</sup> *Constituição Política da Monarchia Portuguesa*, 1822, op. cit.. A similar designation had been adopted in the Bayonne Statute, the first Spanish Constitution, in 1808, by pressure of the representatives of the Viceroyalty of the Río de la Plata, who were displeased with the label ‘colony’ of the original version. See Ortega Martínez, Francisco (2012), ‘Entre “constitución” y “colonia”, el estatuto ambiguo de las Indias en la monarquía hispánica’ in Francisco Ortega Martínez and Yobenj Aucardo Chicangana-Bayona (eds.), *Conceptos fundamentales de la cultura política de la Independencia*, Bogotá, Universidad Nacional de Colombia, pp. 61-91.

<sup>40</sup> *Proclamação do Governo sobre a Convocação das Cortes*, 31<sup>st</sup> October 1820, compiled in Paula, Sérgio Goes (2001) (ed.), *Hipólito José da Costa*, São Paulo, Editora 34, p. 135

<sup>41</sup> ‘Conservar a integridade do Império Lusitano em ambos os Hemispherios: estreitar os vinculos de sangue, e dos interesses, que mutuamente ligão todos os Portuguezes das quatro

differentiation on the basis of geographical location were perpetuated in the fundamental law of the nation. Therefore, overseas territories should be integrated in the nation and receive the same treatment as the metropolitan provinces, being represented in the same legislative body and ruled by the same executive institutions. From this point of view, having overseas provinces instead of possessing colonies postulated the dilution of the provinces in the national whole. It was thus associated with *assimilation* and *centralisation*.

The members of the Constituent Assembly in representation of Brazil had a different point of view, though. For them, receiving the same treatment as the metropolitan provinces implied all the rights that the notion of provinces entailed. This included having legislative and executive institutions as the metropole: in a truly United Kingdom of Portugal, Brazil, and the Algarves, the Kingdom of Brazil should be equated to the Kingdom of Portugal, not subordinated to the Kingdom of Portugal. This federalist conception was predicated on *autonomy* and *decentralisation* rather than assimilationist integration. Without autonomy, the expression ‘overseas provinces’ would be emptied of its meaning and the overseas territories would just be colonies with a different name. This conception was clearly articulated in a fervent intervention of António Carlos Ribeiro de Andrada in the Constituent Assembly on 26<sup>th</sup> June 1822: the representative of São Paulo, who less than one year later would be part of the first Constituent Assembly of the now independent Brazil, sarcastically stressed how remarkable it was that ‘a Nation which pours out liberal principles does not want to give to its overseas provinces what the English gave to the English colonies’.<sup>42</sup>

As Cristina Nogueira da Silva noted, during the Constitutive Assembly it prevailed a general ‘repudiation of the colonial system’ – or, to be more exact, of its discursive formulations, albeit preserving its practices – in favour of the idea of a unitary and equalitarian Nation.<sup>43</sup> Caught in the middle of power struggles between an

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partes do Globo’ in *Diário das Cortes Geraes e Extraordinárias da Nação Portuguesa*, 3<sup>rd</sup> February 1821, p. 23.

<sup>42</sup> ‘O que é de admirar é que uma Nação que decanta principios tão liberais, não queira conceder às suas províncias ultramarinas o que os Ingleses às colónias inglesas.’ *Diário das Cortes Geraes e Extraordinárias da Nação Portuguesa*, 26<sup>th</sup> June 1822, p. 569.

<sup>43</sup> Silva, Cristina Nogueira (2009), *Constitucionalismo e Império. A Cidadania no Ultramar Português*, Coimbra, Almedina, p. 99. On the first Constitutive Assembly, see especially

impoverished metropole and its wealthy American colony, African and Asian colonies benefited from this inclusive rhetoric, which was mainly an attempt to appease Brazilian autonomist voices, by extension. In fact, despite being named ‘overseas provinces’ in the 1822 Constitution, African colonies had been mainly referred to as ‘possessions’, ‘dependencies’, and ‘dominions’ during the Constitutive Assembly’s discussions.<sup>44</sup> Significantly, after the recognition of Brazil’s independence, the non-hierarchically neutral word ‘dominions’ was used for colonies in the Constitutional Charter in 1826.<sup>45</sup> Nevertheless, the expression ‘overseas provinces’ was recovered in the following two Constituent Assemblies. Therefore, it appeared in both the Constitution of 1838 and the Constitution of 1911, even though the metropolitan provinces had been divided into districts in 1835 and no longer existed as administrative circles in continental Portugal.<sup>46</sup>

Meanwhile, the idea of legislative and executive standardisation of all Portuguese provinces with disregard of their geographical location fell by the wayside. The Constitution of 1838 provided for the application of differentiated regulations in the colonies – the so-called ‘special laws’ – in accordance with their development, empowering the colonial governors to legislate without intervention of the parliament.<sup>47</sup> Stressing the essential difference between coloniser and colonised – the rule of colonial

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chapters 4 and 5, pp. 95-125. For an overview of the political and economic background, see Valentim Alexandre’s pivotal study: Alexandre, Valentim (1993), *Os sentidos do Império. Questão nacional e Questão Colonial na Crise do Antigo Regime Português*, Porto, Edições Afrontamento.

<sup>44</sup> Silva, Cristina Nogueira (2009), *Constitucionalismo e Império. A Cidadania no Ultramar Português*, op. cit, pp. 384-385.

<sup>45</sup> Carta Constitucional da monarchia portuguesa decretada e dada pelo rei de Portugal e Algarves D. Pedro, Imperador do Brazil, aos 29 de Abril de 1826, Rio de Janeiro, Typographia Imperial & Nacional. This text was not a result of a Constitutive Assembly, being unilaterally imposed by D. Pedro IV (Pedro I of Brazil) in his extremely brief reign right before abdicating the Portuguese throne in favour of his daughter Maria in order to maintain his title of Emperor of the now independent Brazil.

<sup>46</sup> According to the administrative reform introduced by the Law from the 25th April 1835, *Collecção de Leis e outros documentos officiais publicados desde 15 de Agosto de 1834 até 31 de Dezembro de 1835*, Fourth Series, Lisbon, Imprensa Nacional, pp. 132-133

<sup>47</sup> Article 137<sup>th</sup>, Constituição Política da Monarquia Portuguesa, *Diário do Governo*, 24<sup>th</sup> April 1838.

difference, to use Partha Chatterjee's terms –<sup>48</sup> was vital for the maintenance of colonial power structures and practices but was inconsistent with the trope of the united nation with provinces of the same kind in the four parts of the globe. The decentralisation introduced by special laws was not in equalitarian terms, as the one defended by the Brazilian representatives on the eve of the secession of the American colony, but rather based on exclusion. Therefore, it reinforced the inferior status of the overseas provinces in relation to the metropole instead sameness. The contradiction between the ideas suggested by words and the effective practices was pointed out by parliament member Xavier Cordeiro. It is worth quoting some words of his address to the assembly during the discussion of the Additional Constitutional Act of 1852:

We have Overseas Provinces; we do not have Colonies or Possessions; (...) the inhabitants of Asia and Africa are as Portuguese citizens as the ones of any province of the Kingdom in Europe. For that reason, I support the name Overseas Provinces. But if it is like this, why do not we give the Overseas the same laws, the same privileges, [and] the same rights that we give to our Provinces in the continent? <sup>49</sup>

His interpellation generated controversy in the parliamentary circle but the provisions regarding the 'special laws' for the colonies were maintained.<sup>50</sup> By the same token, the Constitution of 1911 after the establishment of the Republic endorsed the

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<sup>48</sup> Chatterjee, Partha (1993), 'The Colonial State' in Idem, *The Nation and its Fragments: Colonial and Postcolonial Histories*, Princeton, Princeton University Press, pp. 14–34.

<sup>49</sup> 'Nós temos Províncias Ultramarinas, e não temos Colónias nem Possessões; (...) os habitantes da Ásia e da África são Cidadãos tão Portuguezes, como são os de qualquer Província do Reino na Europa; e por isso acho muito bem consignada a denominação de Províncias Ultramarinas. Ora, se isto assim é, porque não daremos nós ao Ultramar os mesmos foros, as mesmas regalias, os mesmos direitos, que damos ás nossas Províncias do Continente?' Intervention of Xavier Cordeiro, *Diário da Câmara dos Senhores Deputados da Nação Portuguesa*, 24<sup>th</sup> March 1852, p. 304.

<sup>50</sup> For a short account on the debate on colonial affairs in the Portuguese Parliament from 1820 to the Republican revolution, see Alexandre, Valentim (2008), *A questão colonial no Parlamento. Vol. I, 1821-1910*, Lisbon, Publicações Dom Quixote – Divisão de Edições da Assembleia da República. See also the aforementioned book on empire and constitutionalism, Silva, Cristina Nogueira (2009), *Constitucionalismo e Império. A Cidadania no Ultramar Português*, Coimbra, Almedina.

system of differentiated rule.<sup>51</sup> The understanding of ‘overseas provinces’ as a standardising term in opposition to ‘colonies’ as a segregative term had gradually lost its significance, not being as straightforward as they had been at the time of the discussion and promulgation of the first Portuguese Constitution. In the parliament, ‘colonies’ and ‘overseas provinces’ were used interchangeably.<sup>52</sup> The ambiguity regarding words and erosion of the concepts associated with them during the First Republic is evident in details such as the adoption of the expression ‘overseas provinces’ in the constitutional text while the ‘Ministry of the Navy and Overseas’ had been replaced by the ‘Ministry of Navy and Colonies’ immediately after the overthrow of the monarchy.

However, an amend to the Constitution issued as part of the ongoing Republican reform of colonial administration changed the title of the section referring to the colonies in 1920: at the same time that, to use the expression employed in the first article of the law, ‘financial autonomy and decentralisation’ was granted to the colonial territories, the title ‘Portuguese Colonies’ replaced ‘Administration of the Overseas Provinces’.<sup>53</sup> The novel regime of High Commissioners of the Republic (*Alto Comissários da República*) was to be applied in Angola and Mozambique only. The High Commissioners of the Republic hold the executive power of the colony under their administration. The power to make and approve the ‘special laws’ belonged to the Legislative Council of the Colony (*Conselho Legislativo da Colónia*), in accordance with the specific needs of the colony. Therefore, there was more autonomy in relation to the metropole than in any previous regime of colonial governance. Had thus ‘colony’ become associated with autonomy and decentralisation? However, as the High Commissioner accumulated the executive power with the headship of the legislative council, the involvement of settlers – let alone Africans – in the administration of their territories continued to be virtually nonexistent. Furthermore, High Commissioners were

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<sup>51</sup> Article 67<sup>th</sup>, Constituição Política da República Portuguesa, *Diário do Governo*, 21<sup>st</sup> August 1911.

<sup>52</sup> On parliamentary debates on colonial issues, see Proença, Cândida (2008), *A questão colonial no Parlamento. Vol. II, 1910-1926*, Lisbon, Publicações Dom Quixote – Divisão de Edições da Assembleia da República.

<sup>53</sup> Law 1.005, Article 8, *Diário do Governo*, 7<sup>th</sup> August 1920.

nominated in the metropole, not being born in the colonies. They were thus an almost plenipotentiary figure sent from Lisbon, i.e. sent from the head of the Empire to the periphery.<sup>54</sup> As such, did the adoption of the designation ‘colony’ actually betray a loss of autonomy and reinforcement of colonial subordination? These views coexisted. Indeed, the repertoire of meanings of ‘colony’ and ‘overseas provinces’ was not limited to these two possibilities, as a closer look into the heated debate around Salazar’s choice of words in the Colonial Act in 1930 will show.

### **3.1.2. Debates on Colonial Act’s wording: imaginings of national unity**

By the time Salazar made Colonial Act’s preliminary version available to the nation through a press release on 29<sup>th</sup> April 1930 and invited public opinion to discuss it, the replacement of ‘overseas provinces’ with ‘colonies’ in the 1920 amend to the Constitution seemed to have faded into oblivion. As a consequence, Colonial Act’s third article defining that the Portuguese colonies were to be called colonies attracted much attention, being fervently discussed alongside provisions regarding the economic and administrative reorganisation of the territories. The debate was facilitated by the printed media, which enquired Portuguese colonial experts about the project. In addition, the Third National Colonial Congress, which was convened in the Geographical Society of Lisbon from 8<sup>th</sup> to 15<sup>th</sup> May, was extended in order to accommodate a session for the

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<sup>54</sup> For instance, for the African League of Lisbon (*Liga Africana de Lisboa*), the High-Commissioner system was a highly ‘imperialist regime’. See Torgal, Luís Reis (2012), ‘Républica e Colonialismo: A experiência Africana de António José de Almeida’ in Pimenta, Fernando Tavares (ed.), *República e Colonialismo na África Portuguesa. Elementos para uma Reflexão*, Porto, Edições Afrontamento, ch. 1, pp. 11-36. For the reception of the High Commissioner by European settlers in Angola, see Pimenta, Fernando Tavares (2008), *Angola, os Brancos e a Independência*, Porto, Edições Afrontamento, pp. 71-136.

collective appreciation of Colonial Act's project.<sup>55</sup> The reception of the project was far from consensual but one aspect was common to both supporters and critics of Colonial Act and its terminology: Salazar's initiative as interim minister of Colonies would break with the Portuguese constitutional tradition of referring to the colonies as overseas provinces.

Unquestionably Colonial Act was intended as a rupture with the First Republic's colonial administration, extinguishing the regime of High Commissioners of the Republic and inverting its consequences. African colonies, which before the First Republic had a mainly favourable position in Portuguese balance of trade and a relatively low weight in the metropolitan budget, had become a heavy economic burden.<sup>56</sup> The impact of the 1929 crash on colonial economies worsened a situation that was felt since the mid-1920s as a consequence of the High Commissioners' power to freely raise loans for their colonies. Angola was particularly affected. General José Norton de Matos, the High Commissioner between 1921 and 1924, had massively invested in the infrastructural development of the colony, raising its indebtedness to an unbearable level. In 1930 Angola's financial situation was critical, being perceived at the time by members of the conservative and progressive elites alike as a consequence of decentralisation and 'excessive autonomy' granted to the colonies. Furthermore, news about a revolution led by the Chief of Defence Staff against the High Commissioner of Angola and supported by numerous European settlers in Luanda reached the metropole.<sup>57</sup> Although the information about the events that reached the metropole was limited, the imminent outbreak of a civil war reinforced the idea amongst the metropolitan public that Angola – the largest and more important

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<sup>55</sup> III Congresso Colonial Nacional. Actas das Sessões e Teses, Lisbon, Sociedade de Geografia de Lisboa, p. LXIII. On the colonial congress, see Barata, Óscar Soares (2005), 'Os Congressos Coloniais na Sociedade de Geografia', *Boletim da Sociedade de Geografia de Lisboa*, 123, pp. 311–361.

<sup>56</sup> According to Pedro Lains's examination of the data. Lains, Pedro (1998), 'An account of the Portuguese African empire, 1885-1975' in *Revista de Historia Económica*, 16 (1), pp. 235-263. See also Pedreira, Jorge (1998), 'Imperialismo e Economia', in Bethencourt, Francisco e Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, vol. IV, *Do Brasil para África (1808-1930)*, Lisbon, Círculo de Leitores, pp. 268-299.

<sup>57</sup> On Angola's white secessionism, see Pimenta, Fernando Tavares (2008), *Angola, os Brancos e a Independência*, Porto, Edições Afrontamento.

Portuguese colony – was out of control. Colonial Act countered this tendency, being presented as an action of power over the colonies and a reinforcement of Portugal’s sovereignty in its vast – and perceived as coveted, as seen in the previous chapters – empire.

Therefore, Colonial Act carried on and consolidated the trend of political centralisation and financial autonomy introduced by the Organic Bases for Colonial Administration (*Bases Orgânicas da Administração Colonial*) after the military coup in 1926.<sup>58</sup> Henceforth, colonies were considered autonomous financial entities, being responsible for assuring the balance of their budgets on their own. But their autonomy ended there: metropolitan control – not only financial but also political and administrative – was significantly intensified. In this sense, inscribing ‘colonies’ and ‘Portuguese colonial empire’ – expressions that were also used in the 1926 Organic Bases for Colonial Administration – in the constitution, let alone devoting an entire article to define the proper terminology rather than just changing the terms in the text, was clearly a political stance. The expressions ‘colonies’ and ‘Portuguese colonial empire’ entailed a conception of the nation as a political compound – or, as Salazar would put it a few years later, as a ‘differentiated social aggregate’, with different parcels united ‘under the sole authority of the state’ despite being geographically apart.<sup>59</sup> In a nutshell, the crystallisation of the terms ‘colonies’ and ‘colonial empire’ was the extension of the metaphor of the nation as a human body in which each organ was assigned an individual function while working in harmony for the whole – a metaphor that was a key aspect of twentieth-century authoritarian European corporatism not only in the Portuguese *Estado Novo* – to imperial context. Instead of the polycephaly associated with the High Commissioner’s regime, the metropole was now set apart as the only head of the nation, coordinating all the parcels. From this perspective, national unity rested on differentiation.

This understanding was highly contested across the political spectrum during the public debate on Colonial Act. The line between supporters and opponents of the conception of nation in which the Colonial Act was predicated did not always overlap

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<sup>58</sup> Decree 12 421, *Diário do Governo*, 2<sup>nd</sup> October 1926.

<sup>59</sup> ‘Nota Oficiosa de Sua Excelência o Presidente do Conselho’, *Boletim Geral das Colónias*, XI, 125 (November 1935), p. 16.

with the line between usual supporters and opponents of the dictatorship in general and Salazar in particular. Therefore, it was possible to find people within the sphere of influence of the government who criticised the adoption of ‘colonies’ and ‘colonial empire’ as vehemently as notorious adversaries of the regime. Nuances in their discourses are plentiful but some converging core assumptions can be identified amongst the critical voices.

‘Colonies’ and ‘colonial empire’ were mainly seen as recent lexical imports, inspired by foreign imperialistic ideologies that did not reflect the Portuguese tradition of colonising which had been shaped by centuries of presence beyond the metropolitan frontiers. Indeed, ‘overseas provinces’, ‘overseas possessions’ or ‘overseas dominions’ can be found in contemporary accounts of the earlier Portuguese colonial ventures, as the quotation of a selection of texts from the sixteenth century reminded the readers of daily *A Voz*.<sup>60</sup> Where did the artificial Colonial Act’s wording come from and what did it mean?

For Cunha Leal and Hipólito Raposo, who were openly critics of Salazar and his policies even before the Colonial Act, they came from Salazar’s ego. In their opinion, ‘Portuguese colonial empire’ was a pretentious phrase, being understood as a rhetoric fabrication to forge national greatness. In truth, neither Cunha Leal nor Hipólito Raposo doubted Portuguese national greatness: national greatness – both geographical and spiritual one – was not under question; what was questioned was the attempt to associate Portugal with a kind of greatness that was not its own. In the words of Hipólito Raposo, ‘without armed strength, without ships, unable to defend itself, without aggressiveness’, empire was an empty expression. From this perspective, ‘empire’ was better used to describe colonial policies of great expansionist powers but not the Portuguese policies. Therefore, the choice of words in Colonial Act was perceived as a disclosure of the government’s intention to apply British imperialist methods to the Portuguese colonies – the Portuguese overseas provinces, in their own terms – instead of continuing on the Portuguese path of effacement of difference

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<sup>60</sup> *A Voz*, 4<sup>th</sup> May 1930, p. 1 and 11<sup>th</sup> May 1930, p. 1 With a significant distribution in the metropole, *A Voz* was the brainchild of catholic and monarchic counsellor Fernando de Souza, a keen devotee of Salazar since he first entered the government in 1928.

between nationals with disregard of their geographical origin and race.<sup>61</sup> Briefly, it was seen as a dilution of the Portuguese specificity, prioritising the similarity with other colonial powers at the expenses of the similarity within nationals.

Conversely, some intervenients in the debate on Colonial Act welcomed the introduction of the word ‘empire’ in the Portuguese constitutional legislative body. Mimicking the designation used by the European great powers was seen as an affirmation of the Portuguese importance in the world, an action that was particularly meaningful in the international context at the time as it could positively impact Portugal’s reputation abroad. The adoption of a similar lexicon was thus a big step to be treated as equals by the other colonial powers. As jurist Garcia da Fonseca emphasised during his intervention at the Colonial Congress, if Britain and France had ‘colonial empires’, Portugal did not lag behind and should proudly use the designation ‘colonial empire’ as well.<sup>62</sup> In his turn, Américo Chaves de Almeida, who as Hipólito Raposo integrated *Integralismo Lusitano* (a political movement inspired by Charles Maurras’s *Action Française*), considered that the term ‘empire’ was ‘an affirmation of Portugueseness rather than imperialism’, a perspective that was shared by the renowned Africanist Aires de Ornelas and by Henrique Galvão.<sup>63</sup> The referent of empire in use here was the Ancient Roman’ model, encompassing a meaning very different from the ideas associated with modern imperialism. Being related with verb *imperare* (‘to command’), it suggested heroic conquest followed by integration in a greater entity rather than exploitation. For that reason, the three men applauded the patriotism and nationalist orientation of Salazar’s initiative. In general, they were very supportive of Colonial Act’s provisions. However, unlike Henrique Galvão, neither Chaves de

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<sup>61</sup> See Hipólito Raposo’s opinion article in *A Voz*, 11<sup>th</sup> May 1930, p. 1 and p. 8. See also Cunha Leal’s intervention during the Third National Colonial Congress in *III Congresso Colonial Nacional. Actas das Sessões e Teses*, Lisbon, Sociedade de Geografia de Lisboa, pp. CXCI-CC

<sup>62</sup> Garcia da Fonseca’s intervention during the Third National Colonial Congress in *III Congresso Colonial Nacional. Actas das Sessões e Teses*, op. cit. pp. CCIX.

<sup>63</sup> Chaves de Almeida’s intervention during the Third National Colonial Congress in *III Congresso Colonial Nacional. Actas das Sessões e Teses*, op. cit. pp. CCII. See also Aires de Ornelas’ interview in *A Voz*, 7<sup>th</sup> May 1930, p. 1 and Galvão’s intervention during the Third National Colonial Congress in *III Congresso Colonial Nacional. Actas das Sessões e Teses*, op. cit., p. CCXXIX. See also Chaves de Almeida, Américo (1932), ‘Provincias Ultramarinas – Política Colonial da Nação’ in *Integralismo Lusitano – Estudos Portugueses*, I (1), April 1932, pp. 39-43.

Almeida nor Aires de Ornelas approved the word ‘colonies’. They welcomed the expression ‘Portuguese empire’ as an entity including both the metropole and the colonies but rejected the division between Portugal, on the one side, and the Portuguese Colonial Empire, on the other, that was evident on the Colonial Act’s third article. This perspective was widely shared. There was slippage between what was ‘imperial’ and what was ‘colonial’ in the Portuguese imaginary: Portugal did not have a colonial empire; Portugal *was* an empire.<sup>64</sup>

This belief that Colonial Act’s terms would destroy the indivisibility and integrity of the nation – hence violating what was perceived as the Portuguese ‘unitary tradition’ – was at the heart of the chorus of voices that recommended the replacement of ‘colonies’ with ‘overseas provinces’. References to the constitutional tradition – with disregard of the 1920 amend – abounded. For instance, Caetano Gonçalves, judge of the Supreme Court and former governor of Angola, argued that the Colonial Act defied the nationalising tradition of the Portuguese constitutions, dividing what was hitherto united in the fundamental law of the nation.<sup>65</sup> According to Domingos Pepulim, a respected master of jurisprudence and sympathetic of nationalist and authoritarian values,<sup>66</sup> the unitary tradition was older than the constitution: he looked at the Portuguese legislative repertoire back to the fifteenth century to justify his vigorous opposition to the ‘dangerous duality’ between parts of the nation introduced by Colonial Act.<sup>67</sup>

The idea that the Constitution had to be the same for the entire nation without making any distinction between Portuguese people in the four parts of the globe was

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<sup>64</sup> See, for instance, Costa, Augusto (1934), *Portugal vasto Império*, Lisbon, Imprensa Nacional. The book results from the collection of a series of enquiries to Portuguese intellectuals initiated in 1926 and originally published in *Jornal do Comércio e das Colónias*.

<sup>65</sup> Caetano Gonçalves’s intervention during the Third National Colonial Congress in *III Congresso Colonial Nacional. Actas das Sessões e Teses*, Lisbon, Sociedade de Geografia de Lisboa, p. CCVIII.

<sup>66</sup> Pepulim had been involved with the short-lived Conservative Republican Party (*Partido Republicano Conservador*), which was openly nostalgic of Sidónio Pais’s New Republic (1917-1918). See Leal, Ernesto Castro (2008), *Partidos e Programas: O Campo Partidário Republicano Português, 1910-1926*, Coimbra, Imprensa da Universidade de Coimbra, pp. 73-76. The Manifest of the Conservative Republican Party can be found in p. 235.

<sup>67</sup> See the transcription of Domingos Pepulim’s motion in General-Secretary of the Third National Colonial Congress, Ernesto de Vasconcellos, to the minister of Colonies, António de Oliveira Salazar. IANTT, AOS, CO, UL\_1, pt.2, 3<sup>a</sup> sub-seccção, ff. 167-175.

repeated by the printed media and by political actors as diverse as General Norton de Matos and Colonel João de Almeida, a far-right military officer, ‘hero’ of the Pacification of Dembos, and former administrator of Angolan jurisdiction of Huíla. Norton de Matos alerted for internal perils created by Colonial Act’s third article, claiming the division between ‘a metropole of small population and small territory’ and a huge empire that the Colonial Act’s provisions submitted to exclusion, inferiorisation, and subordination was a ‘serious mistake’.<sup>68</sup> João de Almeida advocated for the suppression of the third article from Colonial Act and suggested the following alternative wording to be included in the future constitution:

Portugal is constituted by the following provinces: Minho, Trás-os-Montes, Beira, Estremadura, Alentejo, Algarve, Madeira, the Azores, Cape Verde, Guinea, São Tomé and Príncipe, Mozambique, India, Macau, and Timor. (...) All of them are equality integral parts of Portugal.<sup>69</sup>

In João de Almeida’s opinion, the enumeration of the Portuguese territories from the further north Minho in the metropole to the far Timor in maritime Southeast Asia would show the world that ‘Portugal, either on this side of the sea or beyond the sea, has the unity of an indestructible block’. Similarly, Chaves de Almeida was convinced that words could make a difference in the protection of national integrity from foreign threats. During the colonial congress, he argued that ‘it is possible to take a colony from a small and weak country but it is harder to take a province from it’, an affirmation which granted him an effusive applause from the audience.<sup>70</sup> This belief was already ingrained in the Portuguese imagination. Therefore, it is not surprisingly

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<sup>68</sup> ‘Nos termos deste artigo passa a haver ao lado de uma metropole de diminuto território e população diminuta um enorme Império. Passa a haver Portugal e o seu Império: duas entidades diversas. E isto parece-me uma manobra, um erro grave. Leva em si um perigo.’ *Diário de Notícias*, 7<sup>th</sup> May 1930, p. 1. See also Bernardino Machado’s pamphlet, *O Acto Colonial da Ditadura*, in which the former president of Republic and leader of the opposition exiled in France criticised the separatism created by the dictatorship with Colonial Act.

<sup>69</sup> ‘Entendo mesmo que o artigo primeiro da Constituição deve ser assim redigido aproximadamente: Portugal é constituído pelas seguinte províncias: Minho, Trás-os-Montes, Beira, Estremadura, Alentejo, Algarve, Madeira, Açores, Cabo Verde, Guiné, São Tomé e Príncipe, Moçambique, India, Macau e Timor. (...) Todas são igualmente partes integrantes de Portugal.’ *A Voz*, 17<sup>th</sup> May 1930, p. 1.

<sup>70</sup> See his intervention during the Third National Colonial Congress in *III Congresso Colonial Nacional. Actas das Sessões e Teses*, Lisbon, Sociedade de Geografia de Lisboa, p. LXXVIII.

that the trope of ‘Portugal from Minho to Timor’ was revived in the printed media when the rumours regarding the distribution of the Portuguese colonies in Africa emerged in the second half of the 1930s. Portugal as a united and indivisible block spread in the world could not be alienated.

The use of the expression ‘overseas provinces’, which was considered more in accordance with the Portuguese ‘historical tradition’ than colonies, was one of the few recommendations for the improvement of the Colonial Act that the Colonial Congress was able to approved in its final session, even though not unanimously.<sup>71</sup> However, the widespread defence of the substitution of ‘overseas provinces’ for ‘colonies’ in the Colonial Act concealed conceptual pluralities. Although the lexicon was shared, as we have seen, the meanings associated with it were not. As during the discussion of the Constituent Assembly in 1822, the phrase ‘overseas provinces’ was linked to inclusiveness but inclusiveness could refer to opposite notions of integration or autonomy, depending on the interpretation of what the Portuguese tradition was.

The idea that ‘overseas provinces’ translated the integration of these territories in the national whole by gradually effacing the differences between the parts predominated in the visible part of the debate, being reproduced by almost all the recognised colonial experts that were interviewed in the press, wrote opinion articles in widespread newspapers, and took part in the colonial congress. A different view was expressed by the African elites in Lisbon, who also rejected the designation ‘colonies’ on the basis of its discriminatory implications. In a conference held in the Free University for Popular Education (*Universidade Livre para a Educação Popular*, a progressive institution devoted to the education of adults created during the First Republic that closed its doors later that year), João de Castro from the African National Party (*Partido Nacional Africano*) defended that colonies should be called state-provinces (*estados-província*), being completely autonomous and connected to the metropole through federal bonds.<sup>72</sup>

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<sup>71</sup> The recommendations, as well as many individual additional remarks, were sent to the minister of Colonies. See letter from the General-Secretary of the Third National Colonial Congress, Ernesto de Vasconcellos, to the minister of Colonies, António de Oliveira Salazar. IANTT, AOS, CO, UL\_1, pt.2, 3<sup>a</sup> sub-seccção, ff. 155-188.

<sup>72</sup> *O Século*, 23<sup>rd</sup> May 1930, p. 2. On the African National Party and other Africanist organisations in Portugal prior to the outbreak of the colonial war in 1961, see Pinto de

Also Norton de Matos argued that autonomy was not only desirable but also indispensable for Portugal's national greatness, in accordance with the orientation of his government in Angola.<sup>73</sup> Norton de Matos was also a federalist but his thought differed from the views expressed by the leader of the African National Party in a crucial aspect: Norton de Matos conceived the autonomous government of Angola as a white political undertaking. Despite his commitment with the defence and 'elevation' of Africans while at the helm of Angola, he believed that the civilising mission would take centuries. Furthermore, in his view, autonomy was not a path to independence. The aim was not to create a regime of self-government similar to the British one, to which he was opposed; instead, the transfer of power from central authorities to colonial units would intensify their integration in the nation, a social aggregate based on parity, cooperation, and reciprocity.<sup>74</sup>

Despite the broad level of criticism of the terminology, the final version of Colonial Act that was promulgated on 8<sup>th</sup> July 1930 does not differ in any significant point from the draft version made known to the public ten weeks before.<sup>75</sup> The general concern about the constitutive power of words and naturalisation of what was perceived as an artificial and dangerous conception of the Portuguese nation divided between the European territory and the rest that dominated the public debate was ultimately ignored. The third article remained untouched, preserving its initial phrasing with the endorsement of the Supreme Council of Colonies (*Conselho Superior das Colónias*). Two aspects from the Supreme Council of Colonies' analysis of the Colonial Act's

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Andrade, Mário (1997), *Origens do nacionalismo Africano. Continuidades e ruptura nos movimentos unitários emergentes da luta contra a dominação colonial portuguesa: 1911-1961*, Lisbon, Publicações D. Quixote.

<sup>73</sup> *Diário de Notícias*, 7<sup>th</sup> May 1930, pp. 1-2.

<sup>74</sup> See Norton de Matos, José (1926), *A Província de Angola*, Porto, Author's edition. His visions on decentralisation and national unity are also clear in a series of opinion articles published in the daily *O Primeiro de Janeiro* on 29<sup>th</sup> May and 3<sup>rd</sup>, 13<sup>th</sup>, and 17<sup>th</sup> June 1931 and later developed in Norton de Matos, José (1953), *A Nação Una. Organização política e administrativa dos territórios do ultramar português*, Lisbon, Paulino Ferreira Edições. For a short account, see Silva, Armando (2003), 'General Norton de Matos (1867-1955). Aspectos maiores de um perfil histórico-biográfico - o militar, o colonialista e o democrata', *Africana Studia*, 6, pp. 173-200.

<sup>75</sup> Cf. the text included in the Ministry of Colonies' press release, which can be found on all the major mainstream papers on 29<sup>th</sup> April 1930, with Decree 18.570, *Diário do Governo*, 8<sup>th</sup> July 1930.

proposed terms should be retained. First, it was emphasised that the Portuguese territories faced the same external threats either under the name of ‘colonies’ or under the name of ‘overseas provinces’. The juridical status as inalienable part of the nation was the same under both designations. Therefore, words did not influence the way foreigners would look at these areas of the globe, neither attracting nor detracting malevolent thoughts about the dispossession of Portugal as sovereign power; nor did they create or remove obstacles to the consolidation of such thoughts.<sup>76</sup>

Second, according to the Supreme Council of Colonies, it was not possible to speak of one and single Portuguese tradition of naming the colonies. The council elaborated on words and political concepts associated with them: by contrasting rhetoric and rule, it concluded that three different trends or systems of colonial government in the history of the Portuguese empire could be identified. The first, which lasted from the ‘remote Discoveries Age until the implementation of the constitutional regime’, was characterised by *subjugation* of the conquered territories, which were entirely dependent from the metropolitan power. The metropole wielded dictatorial power and local governors were delegates from the central administration. Therefore, even though the designation ‘colonies’ was not the most common in the parlance at the time of the Discoveries and its immediate aftermath, the Portuguese empire was traditionally predicated on centralisation. The second period identified by the members of the Supreme Council of Colonies resulted from the introduction of liberal ideas in Portugal. Inscribed in the first Portuguese Constitution, ‘overseas provinces’ embodied a system of *assimilation* copied from the French empire. Fuelled by the penetration of foreign ideas – i.e. de-nationalising ideas –, these innovations had made the status of metropolitan provinces and overseas territories equal. According to the council, having the same laws and the same processes of administration, ignoring the specific conditions of the colonies and their populations, had been proved unfeasible. Therefore, some decentralisation had been gradually introduced to the system of assimilation. Finally, assimilation had been replaced with *autonomy*, a system that was in force since the First Republic but had been significantly improved during the dictatorship due to the intensification of metropolitan supervision. Hence, assimilation had already been

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<sup>76</sup> The Supreme Council for the Colonies’ report was annexed to the promulgated text of Colonial Act. See Decree 18.570, *Diário do Governo*, 8<sup>th</sup> July 1930, p. 1314.

abandoned and the expression ‘overseas provinces’ was an anachronism that persisted in the public discourse but had no real expression. In this manner, the change of terminology was not an innovation but rather an attempt to reconcile words with the political concepts that were at their origin.<sup>77</sup> Therefore, according to the Supreme Council of Colonies, the Colonial Act was not creating or adopting a new system of governing: the choice of words was the most appropriated to the policies adopted by the government as *Estado Novo* because they were not associated with a system of assimilation in the Portuguese colonies.

However, shortly after the constitutional revision of 1951, the minister of Overseas Sarmento Rodrigues, who had been minister of Colonies until a couple of weeks before, claimed that assimilation had always been the system adopted by Portugal. Had the constitutional revision initiated a process of revisionism of the Portuguese colonising principles and methods to adapt to the restored terminology? During a speech at the closing session of an event of the Portuguese youth organisation *Mocidade Portuguesa*, he argued that nothing had changed with the exception of the name and Portugal continued its mission and vocation as a coloniser as usual. From Sarmento Rodrigues’s perspective, autonomy, ‘special laws’, and the indigenous statute were just methods to ‘to achieve progress in territories that have economic conditions so different from the metropole and to be able to civilise the indigenous, whose customs are so different from ours in a faster way’ but integration of every Portuguese national, with disregard of his or her race, was at the heart of the Christian, humanitarian, and generous orientation of the Portuguese mission in the overseas.<sup>78</sup> Hence, there was a distinction between the integration of the overseas territories as equal parts of the nation from a statutory point of view and the integration of the colonised peoples. To a certain extent, the latter had to precede the former, which according to the official view had precluded the adoption of the phrase ‘overseas provinces’ twenty years before, even

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<sup>77</sup> There were some dissonant voices though. See the declarations of vote in Decree 18.570, *Diário do Governo*, 8<sup>th</sup> July 1930, pp. 1318-1319, as well as the minute of the Supreme Council of Colonies’ meeting on the 22<sup>nd</sup> May 1930, AHU, MU, Conselho Superior das Colónias, Livro s.n<sup>o</sup> Ano 1929-1930, 29<sup>th</sup> Session.

<sup>78</sup> Sarmento Rodrigues, Manuel Maria (1951), ‘Discurso pronunciado por S. Ex.<sup>a</sup> o Ministro do Ultramar na sessão de encerramento do Centro de Estudos de Formação imperial do Centro Universitário da Mocidade Portuguesa do Porto’, *Boletim Geral das Colónias*, 313 (July 1951), p. 8.

though the colonising principles and methods had remained steady. By extending the application of the Portuguese constitution to the colonies (and thus creating an apparent uniformity) while safeguarding segregated legal and administrative mechanisms predicated on race and geographical location (and thus maintaining a differentiation), the 1951 constitutional revision did change nothing – or did change very little – in the colonising principles. However, instead of bringing words closer to reality as it was claimed, it actually increased the gap between them.

The discursive adjustment in the official rhetoric is generally pointed out in the historiography about *Estado Novo*'s colonial ideology as a turning point between two distinct phases, even though some authors date the second phase from 1945.<sup>79</sup> While the *Imperial Mystique* phase was dominated by the celebration and galvanisation of the role of Portugal as the head of a great empire, the second phase was characterised by a discourse on Portugal as a multi-continental and multi-racial nation, a united *Greater Portugal* 'from Minho to Timor', sharing the same soul despite being geographically spread in the world. From this point of view, the new conception of Portugal, which was informed and legitimised by the renowned Brazilian sociologist Gilberto Freyre and his work on lusotropicalism, was an attempt to counter new perils in the international conjuncture in the post-Second World War. However, in the contemporaries' perspective, new and old international perils were continuously around the corner, being perceived as serious threats to the Portuguese empire already before the war and, consequently, shaping national discourses at the time.

What I suggest, then, is that the divide between the two different periods is not a clear-cut one. In this section, I attempted to show that the two tropes about the Portuguese nation were not mutually exclusive: the idea of Greater Portugal 'from Minho to Timor' did not appear as a substitute to the idea of Empire in order to disguise Portuguese colonialism as something different and more appropriate to the international

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<sup>79</sup> Alexandre, Valentim (1996), 'Ideologia Colonial' in Rosas, Fernando and J. M. Brandão de Brito (eds.), *Dicionário de História do Estado Novo*, Lisbon, Bertrand Editora, pp. 432-434; Castelo, Cláudia (1998), *O Modo Português de Estar no Mundo' O luso-tropicalismo e a ideologia colonial portuguesa (1933-1961)*, Oporto, Edições Afrontamento; Léonard, Yves (1998), Léonard, Yves (1998), 'O Ultramar Português' in Bethencourt, Francisco e Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, vol. V, *Ultimo Império e Recentramento (1930-1998)*, Lisbon, Círculo de Leitores, pp. 31-50, Thomaz, Omar (2002), *Ecoss do Atlântico Sul: Representações sobre o Terceiro Império Português*. Rio de Janeiro: Editora da Universidade Federal do Rio de Janeiro.

context of decolonisation; instead, they coexisted not only at the same time but also in the same individual, which is visible in the criticisms to the Colonial Act's wording. But did they coexist also in the *official rhetoric* in the period of the so-called imperial mystique? Were they complementary also in the representations of the nation endorsed by the members of political power centre and disseminated by the official propaganda apparatus before the constitutional revision of 1951 or even before the end of the Second World War?

### **3.2. 'Here is Portugal!': Presidential voyages to Portuguese Africa**

On 9<sup>th</sup> October 1939 António de Oliveira Salazar paid the National Assembly a visit, bringing a message from the President of Republic with him. Although Salazar seized the opportunity to explain the parliamentary members the reasons that had led the government to proclaim Portugal's neutrality in the Second World War, which had recently begun,<sup>80</sup> the meeting of the National Assembly had been convened because General Carmona wanted to share his impressions about his recent voyage to Africa. From June to September, the President of Republic toured Cape Verde and Mozambique together with the Minister of Colonies, Francisco Vieira Machado, stopping also in São Tomé and Príncipe and in Angola and shortly visiting the Union of South African by invitation of the British king as well. As above mentioned, President Carmona was mainly a nominal figure. Often, if not always, neither Carmona nor any member of his staff authored his speeches, as it is clear in the exchange of correspondence between the minister of Colonies and Salazar during the preparation of

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<sup>80</sup> Neutrality had been declared immediately after the invasion of Poland. The official press release regarding the Portuguese position appeared on 2<sup>nd</sup> September 1939. Consulted in *Diário de Notícias*, p. 1. According to Salazar, by remaining neutral, it had been possible to get Germany's guarantee that the integrity of Portugal and its empire would be respected, while Britain would not demand anything from Portugal in the name of the old alliance if the neutrality was kept. *Diário das Sessões*, 10<sup>th</sup> October 1939, p. 452.

the voyage.<sup>81</sup> Either General Carmona was the author of the words addressed to the National Assembly or not, he was in line with Salazar's government. Therefore, there is a striking aspect in his message: 'overseas provinces' was used from beginning to end while 'colonies' was not mentioned once.<sup>82</sup> In Salazar's intervention that immediately followed Carmona's speech, 'colonies' was not used either, being replaced with expressions such as 'Portuguese lands in Africa' or 'African overseas'.<sup>83</sup> Hence, although the official terminology had been so unambiguously and firmly defined in Colonial Act in 1930, the two highest political figures of the nation were not attached to it.

This was President Carmona's second voyage to Portuguese Africa. On the previous summer, he had visited São Tomé and Príncipe and Angola, with a stop in Madeira, initiating a tradition of presidential voyages to Africa that would later be continued by his successors.<sup>84</sup> The idea for Carmona's voyage had first been launched by António Augusto Aires, a parliamentarian for Angola's constituency, director of the veterinarian services of the colony, and future president of the Angolan section of National Union. In an interview at the National Broadcast in late December 1937, he suggested that Carmona visited Angola on the occasion of the Exhibition-Fair to be held in Luanda in August 1938. Following the interview, the Commercial Association of the Benguela Plateau (from New Lisbon, nowadays Huambo) challenged the remaining commercial associations in Angola to jointly address an invitation to the President of Republic, the Prime minister, and the Minister of Colonies for the inauguration of the

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<sup>81</sup> Francisco Vieira Machado explicitly asked whether he should write Carmona's speeches for the president's visit to the Union of South African or the Ministry of Foreign Affairs was responsible for those interventions, also informing Salazar that José de Almada, the colonial expert of the Ministry of Foreign Affairs that we already know from his involvement in the refutation of the accusations regarding native labour, would be part of the entourage to 'support' the president. See letter from the Minister of Colonies to Salazar on 29<sup>th</sup> April 1939, ANTT, AOS, CO, UL-1C cx. 742, Pt. 4, Viagem presidencial a Cabo Verde, Moçambique, Angola e União Sul África, 1939, 2<sup>a</sup> sub, f. 412.

<sup>82</sup> *Diário das Sessões*, 10<sup>th</sup> October 1939, pp. 450-451

<sup>83</sup> *Idem*, pp. 451-454.

<sup>84</sup> General Craveiro Lopes, president between 1951 and 1958, visited São Tomé and Príncipe and Angola in 1954; Admiral Américo Tomás, president from 1958 until the end of regime, visited Mozambique and Príncipe in 1964 and Guinea and Cape Verde in 1968.

event.<sup>85</sup> The Exhibition-fair of Luanda had been organised with ‘a markedly utilitarian and practical orientation’, giving ‘special prominence to economic affairs’ rather than political propaganda.<sup>86</sup> Nonetheless, when accepting the suggestion to attend Luanda’s exhibition-fair and extending the visit to other places in the colony and to São Tomé and Príncipe, metropolitan authorities had a different idea in mind.

### 3.2.1. National Unity *mise-en-scène*: sending messages to the World

The presidential voyage, which was officially presented as the brainchild of the Minister of Colonies, was converted into a major propaganda event to bolster the bonds of Empire – or at least to bolster the idea that the bonds between the metropole and colonies were strong and *Estado Novo* was devoted to make them even stronger. As it could be read in the press release that announced it, the voyage would ‘represent the principle of national unity that has always informed our overseas action’.<sup>87</sup> General Carmona, as it was repeatedly recalled at the time, was the first Portuguese Chief of State in the quincennial history of the nation as a colonial power to set foot in Africa, with the exception of the kings that took part in the conquest wars in North Africa in the fifteenth century and the royal family’s stopover in São Tomé on their way to Brazil to escape from Napoleonic invasions in 1807. As a result, the symbolism of the voyage – and its potential for propaganda instrumentalisation – was visibly stronger: in the words of the Minister of Colonies, the voyage did not arise ‘from the desire for territorial expansion’, as the former, or ‘defence needs’, as the later, but only ‘because the

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<sup>85</sup> See a copy of the Commercial Association of Benguela Plateau’s call and its peers’ replies in ANTT-AOS, CO, UL-1C, cx. 742, Pt 3, Viagem presidencial a São Tomé e Angola, passando pela Madeira, 1<sup>a</sup> Sub.

<sup>86</sup> Angola’s governor directive regarding the organisation of the exhibition was transcript in its catalogue. *Exposição-Feira de Angola, Luanda, Agosto 1938 – Catálogo Geral Oficial*, Luanda, Imprensa Nacional de Angola.

<sup>87</sup> Dated from 19th March 1938. Consulted in *Diário de Notícias*, p. 1

Portuguese overseas provinces are integral part of the national territory and because the Portuguese who inhabit in the colonies are part of the community as the ones who inhabit the metropole'.<sup>88</sup>

Portuguese Africa had been previously visited by the heir apparent, Royal Prince Luís Filipe, in 1907. Unlike British royal tours to the empire, which were relatively common since the mid-nineteenth century, Prince Luís Filipe's tour to São Tomé and Príncipe, Angola, Mozambique, and Cape Verde was an isolated event.<sup>89</sup> Prince Luís Filipe's tour took place after the eruption of the controversy about the labour conditions in São Tomé and Príncipe's cocoa plantations and the forcible recruitment of labourers in Angola, which was obviously not coincidental. The minister of Colonies, Aires de Ornelas, initially planned a work trip to São Tomé and Luanda in order to assess *in loco* the truth of the accusations. During a lunch-meeting to coordinate the nation's response to chocolate makers' accusations, the Portuguese ambassador in London, the Marquis of Soveral, suggested that Aires de Ornelas invited the young prince to join him and extended the visit to Portuguese East Africa.<sup>90</sup> Therefore, despite being officially presented as a study tour to complement the education of the future king, Prince Luís Filipe's voyage was actually a display of power over the colonies in a context of criticism to Portuguese colonisation. Demonstrating the government's dominance, not

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<sup>88</sup> 'Pela primeira vez um Chefe do Estado Português visista as nossas colónias e fá-lo, não por um desejo de extensão territorial, como os reis da segunda dinastia, que foram ano Norte de África, ou impelidos por necessidades frementes de defesa, como D. João VI, quando retirou para o Brasil, mas tão somente porque as províncias ultramarinas portuguesas fazem parte integrante do território nacional e porque os portugueses que habitam as colónias fazem parte da comunidade, tal como os que habitam a metropole.' Minister of Colonies' special message to *Diário de Notícias* on the day of departure. *Diário de Notícias*, 11<sup>th</sup> July 1938, p. 1.

<sup>89</sup> Neither the Portuguese presidential tours during *Estado Novo* nor Prince Luís Filipe's Voyage to Africa have been studied yet. Contrariwise, the bibliography on British royal tours to the empire abound. On British royal tours to Africa as rituals for empire bonding, see Terence Ranger's pioneering approach: Ranger, Terence (1980), 'Making Northern Rhodesia Imperial: variations on a Royal Theme, 1924-1938', *African Affairs*, 79 (316), pp. 349-373 and Ranger, Terence (1983), 'The Invention of Tradition in Africa', Hobsbawm, Eric and Terence Ranger (eds), *The Invention of Tradition*, Cambridge, Cambridge University Press, pp. 211- 262. See also Cannadine, David (2001), *Ornamentalism. How the British saw their empire*, London, Penguin, p. 115 and Buckner, Phillip (1999), 'The royal tour of 1901 and the construction of an imperial identity in South Africa', *South African Historical Journal*, 41, pp. 324-348.

<sup>90</sup> Ornellas, Ayres (1928), *Cartas d'África. Viagem do Príncipe Real. Julho-Setembro 1907*, Lisbon, Escola Escola Tipográfica das Oficinas de S. José, pp. 5-6.

only to metropolitan and colonial peoples, but most of all to an international audience, was crucial. As such, the heir apparent's voyage to Africa was an affirmation of sovereignty to counter allegations that Portugal was not fit to keep its empire.

With the intensification of the international discussion on the repartition of Africa in the late 1930s, General Carmona's voyages to Africa can be read in a similar fashion. Although the question of the internationalisation of the colonial order was not directly addressed in General Carmona's speeches during either of his African tours, the topic was clearly on the mind of the writer of his speeches. A speech delivered on 30<sup>th</sup> July 1938 in a small town called Santo António do Zaire (nowadays Soyo, located in the southern mouth of the Congo River), is particularly revealing in this sense. General Carmona and his entourage were in Santo António do Zaire for only about two hours and reading the speech likely took him less than two minutes. However, this was the president's speech that stood out the most among the countless speeches he delivered during both his African tours, being widely reproduced at the time and often recalled after. Its sound final words are remarkable:

With the certainty that entire Portugal – from the Past and from Present, both the living and the dead – speaks through my voice, I evoke the builders of national greatness – sailors, soldiers, missionaries, farmers, merchants – and, before God and men, I declare that Portugal will follow the immortal path of its apostolic vocation as a civilising People. In this sacred place of the Fatherland, I proclaim the indestructible and eternal Unity of Portugal from both behind and beyond the seas.<sup>91</sup>

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<sup>91</sup> The original poetry of Carmona's final sentence has been lost in translation here. However, it is perhaps more important to maintain the original relational terms expressed by the prepositions of place, which in Portuguese are used as elements of a noun. The original goes as follow: 'Com a certeza de que fala, pela minha voz, Portugal inteiro – o Passado e o Presente, os vivos e os Mortos, – evoco todos os obreiros da grandeza patria, marinheiros, militares, missionaries, fazendeiros, mercadores, e perante Deus e os homens declaro que Portugal seguirá os caminhos imortais da sua vocação apostólica de povo civilizador e proclamo neste lugar sagrado da Pátria, a Unidade indestrutível e eterna de Portugal de Aquém e Além-mar.' *Boletim Geral das Colónias*, 162 (December 1938), p. 13.

Standing near a replica of the *padrão* that the navigator Diogo Cão and his companions had erected in the same location in 1482 or 1483,<sup>92</sup> Carmona was not simply recalling Portuguese imperial priority and heroism involved in the Discoveries Age and in the consolidation the national endeavour in Africa. References to the national unity between all the Portuguese parcels in the world – and always using neutral terms instead of ‘metropole’ and ‘colonies’ – and the affirmation of the nation’s commitment in the defence of this unity had been at the centre of Carmona’s words since the president had left Lisbon and continued to be upon his return. What was striking in Santo António do Zaire’s speech was the way those same ideas were then formulated. Only on the margin of the mouth of the Congo Basin, which was also a reminder of what was perceived as the large international theft legitimised by the Berlin West Africa Conference, Carmona *proclaimed* Portugal’s national unity in such a solemn and emphatic manner. The message was quite obvious, bringing to mind Salazar’s press release published earlier that year after the appearance of rumours concerning the ninety-nine lease of Angola to Germany mentioned in the previous chapter: ‘we do not sell, we do not give away, we do not rent, and we do not share our colonies’.<sup>93</sup> National unity was ‘indestructible and eternal’.

In order to get its message across, political power relied on the press. An officer of the propaganda agency coordinated the spread of information to news agencies around the world. In addition, invitations had been addressed to both national and international publications to join Carmona’s entourage. In 1938, fifteen journalists – twelve nationals and a Belgian, a Spanish, and a German – travelled with the president, a number that corresponded to more than one third of the entire entourage.<sup>94</sup> In 1939, this number increased to twenty-three, of which twelve were special correspondents of

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<sup>92</sup> A *padrão* was a large stone pillar inscribed with the Portuguese coat arms and usually engraved with the names of the reigning Portuguese king and the navigator who ‘discovered’ the territory, as well as the date of arrival, which were intended to affirm the Portuguese sovereignty.

<sup>93</sup> See Salazar, António de Oliveira (1959), *Discursos e Notas Políticas, 1938-1943*, vol. III, Coimbra, Coimbra Editora, p. 257.

<sup>94</sup> *Boletim Geral das Colónias*, 163 (January 1939), p. 248.

foreign publications or foreign news agencies.<sup>95</sup> A relationship of proximity between the press representatives and the president of Republic, the minister of Colonies and their inner circles was cultivated on board, namely through invitations to individual informal dinners at the president's lodgings and exclusive interviews. The minister of Colonies' interview by the correspondent of Belgian daily *Le Soir*, Désiré Denuit, in which Francisco Vieira Machado explained the 'essence of Portuguese colonisation', is worth referencing. According to Vieira Machado, Portugal had not recently introduced any innovation in its colonial policy but rather maintained the 'traditional system' of the long and fruitful Portuguese experience in India, Brazil, and Africa. This traditional system was, he added, predicated on a policy of assimilation without racial prejudices. Instead of giving primacy to capital, the Portuguese colonisation was essentially focused on the human side. As a consequence, the colonies were Portuguese at their core, being an extension or continuation of Portugal beyond the sea rather than possessions of Portugal.<sup>96</sup> It was thus not surprising that Désiré Denuit referred to the originality of the Portuguese conception of nation in his book with the chronicles of the presidential voyage, underlining a shared patriotic feeling – by metropolitan and colonial peoples alike – that every part of the empire was a Portuguese province as metropolitan Minho or Beira and the every Portuguese would defend them from foreign attacks as such.<sup>97</sup>

Yet, it would be reductionist to read the presidential tours to Africa as mere displays of power for the rest of the world to see, ignoring internal dynamics of pre-war Portugal and its empire. Although the metropolitan and colonial press stressed the international impact of the presidential tours, Carmona's voyages were designed with different target groups in mind. Along with messages to the wider world, there were messages to the Portuguese world as well. The 1938 presidential tour was planned as a 'voyage of sovereignty' particularly aimed at Angola, the problematic but most valuable

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<sup>95</sup> From Belgium, France, Brazil, the USA, Germany, the UK, Italy, and Spain. See *Boletim Geral das Colónias*, 173 (November 1939), p. 721.

<sup>96</sup> *Le Soir*, 17<sup>th</sup> and 18<sup>th</sup> July 1938, reprinted in *Diário de Notícias* in a prominent place on the following days and also in *Boletim Geral das Colónias*, 158-159 (August-September 1938), pp. 61-62.

<sup>97</sup> Denuit, Désiré (1939), *Route des Caravelles* (Lisbonne, Madère, Prince, St. Thomas, Angola), Brussels, Editions de Belgique.

colony of the country.<sup>98</sup> The presence of the Chief of State would, purportedly, reassure European settlers in Angola that they were valued as part of the Portuguese Nation, as well as impress Africans with the pomp and ceremony that surrounded the man who was the epitome of Portuguese rule. The second tour in 1939 repeated the same formula. In other words, the voyages made colonial rule visible to the colonised and to the colonisers. Were these aims achieved? Or did the presidential voyages to Africa motivated also less than loyal feelings to the metropolitan power amongst colonial peoples, fuelling the resistance of European settlers and Africans alike?<sup>99</sup> Looking for the answers to these questions would fall beyond the scope of this dissertation but one can easily imagine the answers that a contemporary metropolitan Portuguese person would give, if the information that reached the metropole at the time had been successfully internalised.

If looking only at the question of how presidential voyages were represented in the metropole, both of them were unquestionably resounding successes. In truth, pomp and ceremony that surrounded President Carmona's voyages to Africa were deliberate to impress Europeans watching them from the metropole as well. Apotheotic events of this kind are an important component of the politics of national identity, reinforcing collective belonging and the maintenance of relations of power.<sup>100</sup> In this sense, the

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<sup>98</sup> See the report of the planning commission in ANTT-AOS, CO, UL-1C, cx. 742, Pt. 4, Viagem presidencial a Africa, 1938, 3ª Sub-seção, ff. 403-404.

<sup>99</sup> Recent research on the British royal tours to the empire emphasised this possible side effect, underlining the plurality of responses to and instrumentalisation of the events. Buckner, Phillip (2003), 'Casting daylight upon magic: Deconstructing the royal tour of 1901 to Canada', *Journal of Imperial and Commonwealth History*, 31 (2), pp. 158-189; Lowry, Donal (2003), 'The crown, empire loyalism and the assimilation of non-British white subjects in the British world: An argument against «ethnic determinism»', *Journal of Imperial and Commonwealth History*, 31(2), pp. 96-120; Clarkson, Anna (2006), 'Pomp, circumstance, and wild Arabs: the 1912 royal visit to Sudan', *Journal of Imperial and Commonwealth History*, 24(1), pp. 71-85; Sapire, Hilary (2011), 'Ambiguities of Loyalism: the Prince of Wales in India and Africa, 1921-2 and 25', *History Workshop Journal*, 73 (1), pp. 37-65; Sapire, Hilary (2011), 'African loyalism and its discontents: the Royal Tour of South Africa, 1947', *The Historical Journal*, 54 (1), pp. 215-240.

<sup>100</sup> For Michel Foucault, the role of political ceremonies was exactly to give rise to a manifestation of power, renewing its vigour. Foucault, Michel (1977 [1975]), *Discipline and Punish: the Birth of the Prison*, London, Penguin Books, pp. 187-188. On the importance of ritual and spectacle to cement collective belonging, see, for instance, Cannadine, David (1983), 'The Context, Performance and Meaning of Ritual: The British Monarchy and the "Invention of Tradition", c. 1820-1977' in Hobsbawm, Eric and Terence Ranger (eds), *The Invention of Tradition*, Cambridge, Cambridge University Press, pp. 101-164; Gillis, John R.

civilian and military parades with both Africans and Europeans, the sports demonstrations with children and grown-ups, the outdoor Masses and massive baptism ceremonies (in which the First Lady and the wife of the Minister of Colonies godmothered dozens of African babies and toddlers), the openings of hospitals and maternities, the reenactments of historical events and inauguration of commemorative monuments or the countless distinctions awarded to both European and Africans in recognition of their outstanding Portugueseness were part of a ‘theatralisation’ of political power.<sup>101</sup> The many activities included in the programmes of the presidential voyages disseminated a controlled view of national order and national unity across continents and across races, highlighting *Estado Novo*’s role in its achievement and consolidation.

The metropolitan press was filled with descriptions and pictures of compact crowds enthusiastically applauding and cheering the Chief of State wherever he went, brandishing Portuguese flags and singing the national anthem. Yet, president Carmona was not only the embodiment of the nation but also a personification of the dictatorship. Hence, the celebration of Portugal as an imperial power was also a celebration of the regime lead by Salazar. People did shout and carry posters with slogans such as ‘Viva Portugal!’ or a very suggestive ‘Here is Portugal!’,<sup>102</sup> but they also carried posters with and shouted slogans such as ‘Long Live President Carmona!’, ‘Long Live *Estado Novo*’, ‘Long Live Salazar!’ or even ‘Salazar! Salazar! Salazar!’ (repeated as in the motto of the *Legião Portuguesa*, the Portuguese paramilitary state organisation founded in 1936). In some cases, people amongst the crowd also performed the so-called nationalist salute (designation by which the Roman salute was known in Portugal). These images were intensely powerful as legitimisers of the existing political order.

The component of effacement of political-ideological differences was stressed in the journalists’ accounts during both presidential tours to Africa. For them, massive popular demonstrations to receive President Carmona were obviously spontaneous

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(1994), *Commemorations: the Politics of national identity*, Princeton, Princeton University Press.

<sup>101</sup> On the ‘mise en scène’ of political power, see Georges Balandier’s seminal work, Balandier, Georges (1980), *Le pouvoir sur scènes*, Paris, Presse Universitaires de France.

<sup>102</sup> References to latter are found only in the accounts of the 1939 voyage in Mozambique.

rather than organised manifestations orchestrated by propaganda and local authorities. Meaningfully, in both tours, journalists claimed to have spotted also political dissidents amongst the crowd in the capitals of two most important colonies. References to specific cases such as a (non-named) former Navy officer and ‘indefatigable revolutionary leader’ cheering the Chief of State upon his arrival to Luanda in 1938 or to a civil servant (identified only as Sabino) with communist ideas ardently acclaiming Carmona in Lourenço Marques in 1939 were used to give colour to the idea that the voyages had triggered the sense of national belonging of usual opponents of *Estado Novo*. From this view, Carmona’s presence in the empire had undoubtedly made individuals understand the supreme importance of being Portuguese and of belonging to a Greater Portugal, putting aside their personal ideologies.<sup>103</sup> In other words, understanding that being against the *Estado Novo* was the same as being against the nation and, consequently, surrendering to *Estado Novo*.

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<sup>103</sup> See the account of *Diário de Notícias*’ special correspondent in 1938, in Leone, Eduardo Metzner (1938), *Rumo do Império*, Lisbon, Agência Geral das Colónias, p. 125-126; and the account of Juliano Ribeiro, special correspondent of *Jornal de Notícias* in the 1939 voyage, in *Boletim Geral das Colónias*, 173 (November 1939), pp. 655-656.



Figure 3.1. General Carmona and Minister Francisco Vieira Machado surrounded by a cheering crowd on their way to the Town Hall in Lourenço Marques (now Maputo) on 17<sup>th</sup> July 1939, the day of their arrival to Mozambique.

Going on foot and keeping little distance from the crowd, they can hardly be identified. They can be found roughly in the middle of the picture: the minister of Colonies, whose face is not entirely visible in this picture, can be identified by his ceremonial top hat; the president walks beside him, humbly bareheaded and smiling around, standing out due to the military insignia on his mantel's collar. Note the presence of people with African, European, and Asian backgrounds side by side. Asian community, especially of Indian origin, in Mozambique was numerous. Looking carefully, it is possible to see that some of the apparently waving hands on the right side are actually Roman salutes (even though only a comparison with the immediate following pictures of this photographic coverage makes it evident.)

Source: *Alguns aspectos da viagem presidencial às colónias de Cabo Verde, S. Tomé, Moçambique e Angola e da visita do chefe de estado à União Sul-Africana realizadas nos meses de Junho, Julho, Agosto e Setembro de 1939*, vol. 1, Lisbon, Agência Geral das Colónias, Vol. I, picture 62, p. 119.

See also pictures 63 (p. 121) and 64 (p. 123). (Memórias de África e do Oriente – Digital Library)

Pictures of the excited masses were complemented with the narration of episodes that stressed the loyalty of Africans in all the Portuguese colonies visited by the presidential entourage. Two examples that the Portuguese had conquered Africans' hearts and minds rather than just imposing colonial power over the colonised people gathered much attention. The first one was the King of Kongo, Don Pedro VII. He attended the ceremony in Santo António do Zaire in 1938, appearing with a red coat embroidered with gold, a velvet mantel, a bicorne hat with plumes and his royal sceptre. While his garnish outfit – or to use some of the expressions used to describe him, his 'carnavalesque' and 'gaudy' outfit – reminded his native roots (and introduced exoticism to the accounts in the press), his attitude of subservience and patriotism were emphasised. To journalists, Pedro VII of Kongo informed that he and his people had always been Portuguese since Diogo Cão first arrived to the kingdom of Kongo and would die as Portuguese, being willing to fight for the fatherland 'until the last drop of our blood'.<sup>104</sup> On an amusing but not less patriotic note, it was also reported that the King of Kongo interrupted a autograph session to rebuke the special correspondent of *Diário da Manhã* for speaking in French with his Belgian colleague: 'Here we do not speak French! Here is Portugal!'.<sup>105</sup>

The second example of the Portugueseness of Africans was the African National League (*Liga Nacional Africana*, a organisation composed by mixed-race and *assimilados* in Angola). On his last day in Luanda before embarking to Lisbon and conclude his first voyage to Africa, General Carmona presided to the foundation stone ceremony for a monument evocative of Don Afonso Henriques, the first king of Portugal. To be inaugurated at the time of the Double Centenary Commemorations of

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<sup>104</sup> *Boletim Geral das Colónias*, 162 (December 1938), p. 182.

<sup>105</sup> The chronicles of the special correspondent of *Diário da Manhã*, Fernando Pamplona, were later reprinted in a special issue of *Boletim Geral das Colónias*, together with the accounts of other correspondents and a selection of other articles in the metropolitan, colonial, and foreign press about the presidential voyages. The episode of King of Kongo's reprimand can be found in *Boletim Geral das Colónias*, 163 (January 1939), p. 281. For other references to the episode, see also p. 216 and p. 398, and *Boletim Geral das Colónias*, 162 (December 1938), p. 184.

1940, held to celebrate the eighth centenary of the foundation of Portugal and the fourth centenary of the restoration of Portuguese independence, the monument had been idealised and entirely paid by the members of the African National League and its supporters. This was interpreted as evidence that even Africans – let alone European settlers who were already born in the colonies – were also aware that their Fatherland began in Europe and the European and overseas components of the Portuguese nation were a single whole.<sup>106</sup> According to the special correspondent of *Jornal de Notícias*, this episode seemed to have impressed the Spanish and German journalists of the presidential entourage the most. While they wondered how the Portuguese had been able to merge a diversity of peoples into a People, their Belgian and Portuguese colleagues knew the answer, as they were more familiar with the Portuguese way of colonising that made Portugal from the other European powers in Africa. It had to do with the ‘Portuguese soul’.<sup>107</sup>

### **3.2.2. Embracing the Empire: a colonialism without colonies?**

Mr Carmona, who presides the Portuguese Republic, departed for a visit to Overseas Portugal. Note that I have not written colonies. There are no Portuguese colonies anymore but rather a Portuguese Empire, whose centre is Lisbon and some [of its] provinces are African. And that’s all.

These were the opening words of an article about the political meaning of the first Carmona’s tour to Africa published on the Parisian daily *La République* (authored by a certain Pierre Dominique) but similar ones could be found in the Portuguese press

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<sup>106</sup> See especially the chronicle written by the *Jornal de Notícias*’s correspondent on 17th August 1938 on the ‘patriotism of the Black’, reproduced in *Boletim Geral das Colónias*, 163 (January 1939), pp. 394-398.

<sup>107</sup> *Ibidem*, p. 397.

on the occasion of both presidential voyages as well.<sup>108</sup> Although many metropolitan publications had been using the terms ‘colonies’ and ‘overseas provinces’ interchangeably after the Colonial Act promulgation – as, in fact, they used to do before the Colonial Act promulgation –, ‘overseas provinces’ clearly predominated and ‘colonies’ could hardly be found during the presidential voyages.<sup>109</sup> Suddenly – and albeit colonialism was on the front pages –, Portuguese ‘colonies’ seemed to have disappeared.

According to Jürgen Osterhammel, although colonies and colonialism are usually associated, it is possible to have both *colonies without colonialism* and *colonialism without colonies*. Both situations are edges of a multiplicity of variants that can be found in the complex colonial phenomenon. In Osterhammel’s perspective, the former occurred in colonial societies with a significant number of settlers and very limited indigenous population (as in New England, Canada or Australia). This numerical advantage of the coloniser hindered the establishment of a constitutive ‘relationship of domination between an indigenous (or forcibly imported) majority and a minority of foreign invaders’, which in the author’s view is the basic component of colonialism. Nevertheless, not every relationship of dominance of a people by a foreign force was a form of colonialism: colonialism presupposes that an entire society was externally manipulated and transformed according to the needs and interests of the colonial rulers and there was an ‘unwillingness of the new rulers to make cultural concessions to subjugated societies’ (even though Osterhammel pointed out certain exceptions in the Portuguese empire in this point), based on unquestioned ideologies of superiority of the coloniser. *Colonialism without colonies* comprises this relationship of dominance. However, according to Osterhammel it was not established between a mother country and a geographically distant colony but rather between a dominant

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<sup>108</sup> Transcribed in *Boletim Geral das Colónias*. ‘O senhor Carmona, que preside aos destinos da República Portuguesa, partiu a visitar o Portugal do Ultramar. Note-se que não digo as colónias. É que já não há colónias portuguesas, mas, sim, um Império Português, cujo centro é Lisboa, e de que certas províncias são africanas, eis tudo’. *Boletim Geral das Colónias*, 163 (January 1939), p. 585

<sup>109</sup> Based on the reading of *Diário de Notícias*, *O Século*, *Diário da Manhã*, *Jornal do Comércio e Colónias*, *Comércio do Porto*, *Jornal de Notícias*, *Diário de Lisboa* and *A Voz*, complemented with the selection compiled by the colonial propaganda agency and reprinted in *Boletim Geral das Colónias*, 163 (January 1939) and 173 (November 1939).

centre and its peripheries within regional integrated continental empires or national states (as in the relation between England and Ireland, Scotland or Wales), denoting a form of internal colonialism.<sup>110</sup>

The rhetoric surrounding the presidential voyages to Africa bears a resemblance to Osterhammel's concept of colonialism without colonies in the sense that it was claimed that there was neither a metropole nor colonies in the Portuguese world, notwithstanding the geographical distance between the centre of power and the peripheries. As such, Portugal was not conceived as the centre of an empire constituted by colonies in Africa, Asia, and, if applying the notion of wider geographic Oceania that many contemporaries endorsed, Oceania. Instead, Lisbon was conceived as the capital of the empire, being the political and administrative centre of Portugal, which encompassed many peripheral provinces, being some of them closer to the centre, like Minho or Algarve, and others more distant, like Macao or Timor. Carmona clearly formulated this centre-periphery conception of Portugal, for instance, during his first speech upon the arrival to Mozambique on 17<sup>th</sup> July 1939: the president of the Republic emphasised that, despite being 'the Chief of the Portuguese empire', he was not 'the representative of a distant metropole' as Portugal was one and only. Either in Lisbon or in Lourenço Marques, he had never left Portugal. The Portuguese had a singular 'unitary concept of Fatherland': 'there is no political differentiation between the provinces of overseas Portugal and European Portugal'.<sup>111</sup> As such, Portugal was a unitary state with only one territory, only one people, and only one government.

To be sure, Portugal was in fact a regular case of colonialism with colonies.<sup>112</sup> However, in the official discourse spread on the occasion of the presidential voyages to

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<sup>110</sup> Osterhammel, Jürgen (2005), *Colonialism: a Theoretical Overview*, Princeton, Markus Wiener Publications, pp. 15-17.

<sup>111</sup> 'Recebo as homenagens dos portugueses de Moçambique não como representante de uma metropole longínqua – mas como Chefe do Império Português, pois não existe diferenciação política entre as províncias de Portugal europeu e as de Além-Mar. É à luz deste conceito unitário da Pátria que posso declarar que, estando neste momento em Moçambique, não saí de Portugal e que as vossas aclamações provem de peitos e de almas de portugueses.' *Boletim Geral das Colónias*, 172 (October 1939), pp. 57-58

<sup>112</sup> As Alexander Keese has recently put it, 'Portuguese colonialism is in its own ways representative of European colonial practices'. Keese, Alexander (2013), 'Searching for the Reluctant Hands: Obsession, Ambivalence and the Practice of Organising Involuntary Labour

Africa, as well as in the printed media, neither Portuguese colonies were colonies as the ones existing in the other European colonial empires, nor the Portuguese colonialism was recognised as colonialism – understood at the light of Osterhammel’s concept – in the sense that domination and subjugation to the metropole had been effaced, despite the dissimilarity between colonisers and colonised and the majority of the latter in the Portuguese colonies. Portugal had a different colonialism, which was original, unparalleled and inimitable.

The originality of the Portuguese system, it was argued, was predicated on the national capacity to embrace the empire as part of the nation, having incorporated the discovered or conquered territories in Africa, America, or Asia in the Golden Age of the Discoveries. As such, despite being cemented with the ‘national blood’ of the many heroes who had fought to defend the *Pátria* in the following centuries, the assimilation of the colonial territories into Portugal had allegedly been automatic. Both in Santo António do Zaire in 1938 and in the Island of Mozambique (where Vasco da Gama and his crew erected a *padrão* in March 1498) in 1939, Carmona claimed that Angola and Mozambique, respectively, had become unquestionably and perpetually part of Portugal – not possessions of Portugal – at the very first moment, i.e. as soon as their ‘discoverers’ had raised the stone marks and the first Mass was conducted in the Portuguese language.<sup>113</sup>

The embrace of the colonial territories as part of the nation would not have been possible without the embrace of the native peoples of those territories as nationals as well. Therefore, the perpetuation of the myth that the Portuguese did not have racial prejudices, treating all the ‘children of Portugal’ as equals with disregard of their racial belonging and receiving them with their open arms and hearts, was crucial. The Portuguese had been, in the words of the special correspondent of *Diário da Manhã*, ‘the only [European] that was able to understand and fraternally estimate [the Africans],

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in Colonial Cuanza-Sul and Malange Districts, Angola, 1926–1945’, *Journal of Imperial and Commonwealth History*, 41 (2), p. 241.

<sup>113</sup> See the transcription of General Carmona’s speeches on Angola in *Boletim Geral das Colónias*, 162 (December 1938), p. 13, and on Mozambique *Boletim Geral das Colónias*, 172 (October 1939), p. 70.

giving them a hand.’<sup>114</sup> By the same token, the special correspondent of *A Voz*, Manuel Múrias (an influential ideologue of *Estado Novo* and activist in its propaganda until his death), reflected on the importance of the Portuguese way of dealing with Africans in shaping the attitudes inscribed in ‘their hearts regarding the people who initiate them on civilisation’: as a consequence, the native population ‘are truly Portuguese in their spirit and actually constitute one of the strongest bases of our permanence in Africa’.<sup>115</sup> These ideas were found not only in the printed media but also in political discourse. Furthermore, as far as he was concerned, General Óscar Carmona was committed to show that the inexistence of racial prejudices was not only an abstract idea. The President of Republic attempted to make sure that the idea of Portugal’s embrace of the empire and its native people was not a mere metaphor.

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<sup>114</sup> Transcribed from Fernando Pamplona’s chronicles in *Boletim Geral das Colónias*, 163 (January 1939), p. 268. The myth of inexistence of racial prejudices in the Portuguese empire will be elaborated on chapter 6.

<sup>115</sup> Transcribed in *Boletim Geral das Colónias*, 173 (November 1939), p. 471

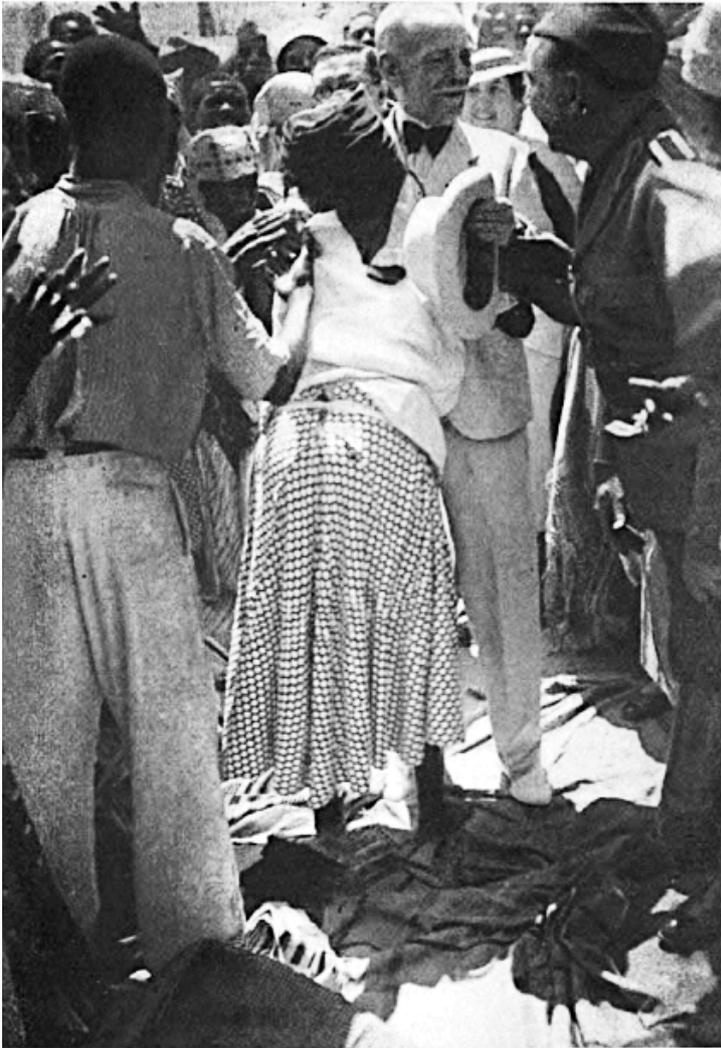


Figure 3.2. African woman embraces President Carmona in São Tomé during his 1938 voyage.

On the previous day, Carmona had embraced an African man, Teotónio Torres, who had been granted an award for his patriotism. Mr Torres received the first of many hugs Carmona gave to Africans in his African tours. The printed media reported also kisses and caresses to African children.

Source: Boletim Geral das Colónias, 162 (December 1938), p. 141

Prior to his return to the metropole from the first presidential tour in 1938, the minister of Colonies gave a last interview to Angolan journalists, praising the way the Angolan population – without any racial distinction – had enthusiastically and patriotically received the President of Republic. Francisco Vieira Machado claimed that the apotheosis had been an expression of the ‘moral and political unity of the Portuguese Nation’, only possible because Angola was ‘an extension of the motherland and one of the most Portuguese provinces of Portugal’.<sup>116</sup> That said, the journalist of *Diário de Luanda* who was conducting the interview asked him if that meant that the

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<sup>116</sup> ‘Angola é o prolongamento da Mãe-Pátria e uma das mais portuguesas províncias de Portugal’. Transcribed in *Boletim Geral das Colónias*, 162 (December 1938), p. 603.

presidential voyage to São Tomé and Príncipe and Angola had, thus, paved the way for the replacement of the word ‘colonies’ with ‘overseas provinces’ in the official terminology. Francisco Vieira Machado smiled and replied that ‘neither the Portuguese tradition, our historical past or the colonial conception of *Estado Novo*’ admitted a concept of the nation other than considering the territories of the Portuguese Empire as a continuation of European Portugal beyond the sea and being as Portuguese as European Portugal.<sup>117</sup> Therefore, there was no distinction and Portuguese rule was non-discriminatory and inclusive. However, the terminology would not be changed: Vieira Machado carried on by concluding that ‘the fact that one calls colonies to the lands of Empire instead of provinces does not change the Portuguese colonial conception nor the realities of our overseas action in their essence.’<sup>118</sup>

Presidential tours to Africa in the late 1930s did not pave the way for the change of terminology, which would happen only in 1951 as aforementioned. However, the Minister of Colonies’ declarations to *Diário de Luanda* show clearly that the trope of the nation as a non-racist Greater Portugal ‘from Minho to Timor’ and the trope of the nation as an Empire were mixed and mingled in his mind.

Portuguese Constitutional texts going back to the late nineteenth century proclaimed the nation to be one and indivisible, independently from the geographical location of its constitutive parts. The designation given to them was changeable over time, though. In this chapter, we have seen how conflicting conceptions of national unity were associated with different terminologies in the minds of the 1930s and 1940s

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<sup>117</sup> ‘A tradição portuguesa, o nosso passado histórico, a concepção colonial do Estado Novo, não admitem outro conceito que não seja o de Portugal de Aquém e de Além-Mar, as terras do Império como prolongamento do Portugal Europeu.’ Transcribed in *Boletim Geral das Colónias*, 162 (December 1938), p. 603.

<sup>118</sup> ‘O facto de se chamar às terras do Império, Colónias em vez de Províncias, não altera fundamentalmente a concepção colonial portuguesa nem as realidades da nossa acção ultramarina.’ Transcribed in *Boletim Geral das Colónias*, 162 (December 1938), p. 603.

contemporaries. These conceptions of national unity were not clear-cut: the idea of a specifically Portuguese, unique tradition was mobilised by different actors, with different aims and in different occasions, being renegotiated on a regular basis. The rhetoric of national unity during the first decades of *Estado Novo* was not in any sense homogenous or static; it did not evolved in a clear unidirectional and irrevocable route either. Rather, it rested upon a set of fundamental assumptions about what it meant to be traditionally Portuguese that were adapted and readapted, with advances and setbacks, to respond to the challenges as they emerged.

## 4. COLONISATION, EMIGRATION, AND SETTLEMENT: MAKING A NEW PORTUGAL IN THE OVERSEAS

In 1933, Henrique Galvão was awarded the first prize at the colonial literature competition promoted by the General Agency for the Colonies for his novel *O Velo d'Oiro* [*The Golden Fleece*].<sup>1</sup> The competition had been created in 1926 to encourage colonial literature, which was almost inexistent in Portugal at the time. In addition to the hefty prize money offered to authors, the colonial propaganda agency ensured the distribution of the winning books for schools and libraries and facilitated their promotion.<sup>2</sup> The effort to make a bestseller only bore fruit in 1933. The success of *O Velo d'Oiro* was unprecedented: two new editions were released after the prize was announced. The story line of Galvão's novel moves around emigration, settlement, and colonisation, telling the story of a young metropolitan man in southern Angola, a region the author knew well.<sup>3</sup>

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<sup>1</sup> Galvão, Henrique (1931), *O Velo d'Oiro*, Lisbon, Parceria António Maria Pereira.

<sup>2</sup> Ordinance 4.565, *Diário do Governo*, 12<sup>th</sup> January 1926. See also *Boletim Geral das Colónias*, 7 (January 1926), pp. 169-171. On the colonial propaganda agency's literature competitions, see Garcia, José Lima (2011), *Ideologia e Propaganda Colonial no Estado Novo: Da Agência geral das Colónias à Agência do Ultramar, 1924-1974*, Coimbra, Unpublished Doctoral Dissertation, pp. 506-535 and 757-760.

<sup>3</sup> Initially deported to Sá da Bandeira (now Lubango) due to his involvement in an attempted coup d'état in 1927, Henrique Galvão later ascended to the position of chief of staff of Angola's High Commissioner and governor of Huíla province in 1929. Despite being governor

At first, the protagonist, Rodrigo, does not intend to settle in the colony but rather to get rich and return home soon to marry his sweetheart, Luísa. He decides to leave his steady job as a bank clerk in Lisbon after receiving a letter from his cousin Vasco, who had already moved with his family to Angola for political reasons and had established himself as a farmer in the Huíla province. Vasco invited Rodrigo to embark on an expedition in a mysterious and dangerous inner region where allegedly gold was so abundant that ‘it does not require any other work than jab the pick and load it in the car’.<sup>4</sup> The idea immediately captivated Rodrigo’s audacious spirit. Supported by African porters and other servants, the two Portuguese men initiate their long inland trip. However, they do not find gold. While Vasco gets back to work in his family farm, Rodrigo returns to the metropole with no fortune and having wasted his savings. Furthermore, he finds out Luísa married another man during his absence. Was *O Velo d’Oiro* a moral tale about the pitfalls of moving to Africa attracted by promises of easy wealth and exciting adventures? In a way, it was. However, at the end, neither Rodrigo nor Vasco are punished for setting out on a quest for a ‘golden fleece’; on the contrary, both of them benefited from their light-minded decision, getting rewards that would have not been achieved otherwise.

To be sure, Henrique Galvão was very critical towards the so-called ‘Eldorado myth’ that led Rodrigo to Angola. His opinion was made clear in his first book about Angola, which he self-published in 1929 under the title *Em Terra de Pretos, Crónicas de Angola* [*In the Land of the Black. Chronicles of Angola*].<sup>5</sup> In this collection of short texts documenting his experience during his first months in Angola, Galvão paints a very negative portrait of the Portuguese settlers in Angola. In his perspective, unlike other European settlers, the Portuguese were dominated by an emigrant’s mentality rather than a settler’s mentality, i.e. by the selfish desire to make fortune and return to the metropole. For that reason, they sought easy profits and preferred to sacrifice their living to levels that degraded the European race at the eyes of the natives in order to

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of Huíla for just a few months, his three hundred pages report revealed a surprisingly deep knowledge about the province, its peoples, its history, and the Portuguese administration. Galvão, Henrique (1929), *Huíla: Relatório de Governo*, Vila Nova de Famalicão, Tipografia Minerva.

<sup>4</sup> Galvão, Henrique (1931), *O Vélo d’Oiro*, op. cit., pp. 12-14

<sup>5</sup> Galvão, Henrique (1929), *Em Terra de Pretos. Crónicas de Angola*, Lisbon, Author’s edition.

reduce their expenses and increase their savings.<sup>6</sup> The book, which Galvão submitted to the 1929 colonial literature competition, provoked the wrath of the head-chief of the colonial propaganda agency, Armando Cortesão. In Cortesão's opinion, 'one who reads and believes in what Mr Henrique Galvão wrote will be ashamed of being Portuguese'. In his view, *Em Terra de Pretos* was 'offensive and defamatory', fuelling foreign menaces against the integrity of the Portuguese empire.<sup>7</sup> As a result, the book was excluded from competition. A 'good piece' of colonial literature needed more than good narrative skills: disseminating positive images of the empire and of the Portuguese coloniser was an implicit requirement for achieving a good result at the colonial literature contest.<sup>8</sup> Galvão soon realised this after *Em Terra de Pretos*. Therefore, he adopted a different approach in his following works.

Although the criticism of the 'Eldorado myth' is central to *O Velo d'Oiro's* narrative, the novel has a happy ending due to a twist in the psychology of the characters. At the end, Rodrigo settles in Angola, starts a family with a European woman he met during his first voyage to the colony, and becomes a successful and hard-working farmer. Rodrigo's understanding of the world changes throughout the novel. First, as soon as he disembarked in Moçamedes (today's Namibe, Southwest Angola), he realised that Africa was different from what he imagined, being surprised with the 'European physiognomy' of the city.<sup>9</sup> Also the rural areas in the Humpata plateau resembled 'a little corner of Portugal' to Rodrigo, who states that the presence of Africans was the only reminder that the green plains and houses with red roofs in front of his eyes were not in Minho or Beira.<sup>10</sup> Second, after their unsuccessful attempt to find gold, Rodrigo and Vasco recognised that hard work was the only way to make

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<sup>6</sup> Galvão, Henrique (1929), *Em Terra de Pretos. Crónicas de Angola*, op. cit., see especially the second chapter, 'O Clima' [the Climate], pp. 39-48.

<sup>7</sup> Cortesão, Armando (1930), 'Quarto concurso de literatura colonial', *Boletim Geral das Colónias*, 55 (January 1930), pp. 162-163.

<sup>8</sup> The requirement later became quite explicit: in 1934, it was clarified that any book that belittles the Portuguese colonial effort would be excluded from the contest. See 'Nota oficiosa da Divisão de Propaganda da Agência Geral das Colónias - IX Concurso de Literatura Colonial', *Boletim Geral das Colónias*, 114 (December 1934), p. 189.

<sup>9</sup> Galvão, Henrique (1931), *O Velo d'Oiro*, op. cit., p. 21.

<sup>10</sup> Idem, p. 27, p. 29.

people rich in the African colonies. During Vasco's absence, his eldest son had taken good care of the farm: the nineteen year-old João had intensified the cultivation of cereals and potatoes, anticipating a very profitable harvest that would greatly improve the family's financial situation in a near future.

However, the main change was in Rodrigo's conception of Portugal and his national consciousness. Only through his experience in Angola, Rodrigo had been able to understand the true geographical and spiritual dimension of Portugal. As Pompílio de Matos, a former colleague that he met in Moçamedes, told him 'in Portugal one learns about our history but only those who come down here can understand and feel deep inside their souls the pride of being Portuguese!'.<sup>11</sup> Consequently, after his return to the metropole, Rodrigo soon realises that he feels connected to Angola and misses it. He concluded that, as a Portuguese man, he carried inside of him 'the spiritual unity of a Motherland that is [both] in Europe and in Africa'.<sup>12</sup> In his reflections, Rodrigo insists the Portuguese needed to understand Africa was neither a terrifying land of 'deadly fevers' nor a 'lottery in which every number is a winner' but rather 'a piece of Portugal connected to its Past and its Future'.<sup>13</sup> Both their individual path to fortune and the national bright future was in their hands and the Empire was the key. In this sense, *O Velo d'Oiro* was primarily an invitation to migration to African colonies, albeit only a selected one.

This chapter is not intended to be a discussion on Portuguese colonial literature. Nevertheless, Galvão's literary interest in colonial settlement did not sprout by accident and it is important to situate it in a wider discussion. What had changed – if anything – to make emigration, settlement, and colonisation a central topic to a mass media such as literature in the early 1930s? To be sure, Galvão's point of view is not based on new or unique ideas. Albeit many – if not all – characters are grossly stereotyped for the sake of literary effect, his fictional account mirrored the state of a long-standing, ongoing debate on colonial migration and settlement. Looking at this debate is of particular value for the purpose of retrieving contemporary construals of the nation and discourses

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<sup>11</sup> Idem, p. 25.

<sup>12</sup> Idem, p. 269.

<sup>13</sup> Idem, p. 266.

of national identity. In Portugal, as in other the colonial powers, African colonies were mainly perceived as empty spaces and, therefore, open to the establishment of new societies that reproduced the coloniser's original society at home. Yet, the aimed version of this supposed original society was an idealised one, capturing its virtues only and leaving its flaws out.<sup>14</sup> The Portugal to be reproduced in the colonies was what had been idealised as Portugal. In this sense, the aim of this chapter is to approach these discourses by looking at colonial migration and colonial settlement through the lens of the representations of the nation that informed the contemporaries' discourses in the 1930s and 1940s.

#### **4.1. Old debates, new conjunctures**

The problem of colonial migration and settlement had a long history in Portugal. By the time quinine started being used as a large-scale malaria prophylactic in the second half of the nineteenth century, enabling Europeans to intensify settlement in Africa, Portugal counted with more than four centuries of overseas colonisation. The second Portuguese colonial empire, centred in Brazil after the decline of the first colonial empire in the Indian ocean during the seventeenth century, had recently come to an abrupt end, propelling Portugal to a third colonial empire. Since seniority was tantamount to know-how in the 1930s and 1940s narratives, it is pertinent to recall Portuguese previous experiments of colonial settlement with naturals from the metropole. They had been very disparate in former imperial constructions, not being

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<sup>14</sup> For an theoretical approach to settler colonialism see Wolfe, Patrick (1999), 'Text and Context: Anthropology and settler colonialism', *Settler Colonialism and the Transformation of Anthropology. The Politics and Poetics of an Ethnographic Event*, London, Cassel, pp. 1- 7; Elkins, Carole and Susan Pedersen (2005), 'Settler Colonialism: A Concept and Its Uses', *Settler Colonialism in the Twentieth Century: Projects, Practices, Legacies*, Routledge, pp. 1 – 20; Veracini, Lorenzo (2010), *Settler Colonialism: An Theoretical Overview*, Hampshire, Palgrave MacMillan.

possible to speak of a single Portuguese tradition.<sup>15</sup> Although elites were aware that the existence of Portuguese people in sufficient numbers was crucial to ensure domination over the territories, different regions and different times obviously posed different challenges. However, the lack of a sustained settlement policy was not only a consequence of the colonisers' need to adapt policies and define appropriate strategies to distinct contexts, though. It was also a result of the metropolitan authorities' reluctance in taking direct responsibility for colonial settlement. The crown's option to lease the Atlantic islands and Brazil to nobleman in the early stages of the Portuguese empire provides an utmost example of this attitude.<sup>16</sup> Nevertheless, others examples of the crown's hesitation can be pointed out.

The State did invest in the construction of forts and fortresses and encouraged the formation of Portuguese urban settlements in both the first and the second colonial empires in order to facilitate military and political control over the occupied areas. Yet, concrete state-directed measures to populate these spaces with metropolitan people beyond expeditionary forces or civil servants were minimal. The transportation of convicts and vagrants to the colonies lasted until the twentieth century<sup>17</sup> but most state-endorsed schemes for colonisation were short-lived or persisted over centuries with many interruptions and rearrangements, making them ineffective. The transportation of orphan girls from the metropole to marry in the overseas is an example of the latter. Created in the sixteenth century in order to challenge the problem of gender unbalance in settler societies, it was eradicated for good only in the mid-eighteenth century.

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<sup>15</sup> For a short account on aspects of Portuguese colonial settlement before the 1850s, see Russel-Wood, A.J.R. (2007), 'Patterns of settlement in the Portuguese Empire, 1400-1800', Bethencourt, Francisco and Diogo Ramada Curto (eds), *Portuguese Oceanic Expansion, 1400-1800*, Cambridge, Cambridge University Press, ch. 6, pp. 161-196. For a more detailed version, see also the author's contributions to Francisco Bethencourt and Kirti Chaudhuri (1998)(eds) *História a Expansão Portuguesa*, Lisbon, Círculo de Leitores: vol. 1, 'Fluxos de emigração', pp. 224-237 and 'A sociedade Portuguesa no Ultramar', pp. 266-279; vol. 2, 'Ritmos e Destinos de Emigração', pp. 114-125, and "Políticas de Fixação e integração", pp. 126-150; vol. 3, 'A Emigração: Fluxos e Destinos', pp. 158-168.

<sup>16</sup> For a short introduction to the system donatary-captaincies in the Portuguese Empire, see Bethencourt, Francisco (1998), 'As capitanias' in Francisco Bethencourt and Kirti Chaudhuri(eds) *História a Expansão Portuguesa*, Lisbon, Círculo de Leitores, vol. 1, pp. 341-352.

<sup>17</sup> On the transport of convicts see Coates, Timothy (2001), *Convicts and Orphans: Forced and State-Sponsored Colonization in Portuguese Empire, 1550-1755*, Stanford, Stanford University Press.

Although initially two to four girls were sent either to Goa or Brazil roughly once per year, the number of girls actually sent to the Empire was low.<sup>18</sup> Another example of the state's intervention in colonial settlement was the sponsored migration of families of farmers with wives in childbearing age from Azores and Madeira to Southern Brazil in the 1740s and early 1750s in order to create obstacles to the foreign penetration in the region; however, this practice was not followed through, performing less well than expected.<sup>19</sup>

Hence, what stands out from settlement in the former imperial formations by the time Portugal turned to Africa is its fragmentary and incipient nature. Portuguese settlement had relied mainly on individuals attracted by financial and/or social advancements that they could not achieve at home (which appealed second sons of noble families and illiterate peasants alike), as well as on elements of undesirable social groups that had been forced or indirectly pressured to leave the metropole.<sup>20</sup> The volume of migration towards the first and second Portuguese colonial empires was thus always rather low for the dimension of the dominions. Although more numerous than in Portuguese Asian, the European population in Brazil was scant, being considerably outnumbered by Africans by the time of the independence. Nevertheless, Brazil was perceived as a successful national creation in the tropics – that is to say, it was a multi-racial society run by a European elite in accordance with European civilisation and its values. Therefore, as the outrage regarding the perceived betrayal of the American colony dissipated, the colonisation of Brazil became a reference for future action still in the nineteenth century. The idea of creating a 'New Brazil' in Africa began to take shape, being largely fuelled by commercial societies but with resonance within political circles.<sup>21</sup>

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<sup>18</sup> See Coates, Timothy (2001), *Convicts and Orphans*, op. cit., pp. 141-162.

<sup>19</sup> Russel-Wood, A.J.R. (1998), *The Portuguese Empire, 1415-1808: A World on the Move*, Baltimore, Johns Hopkins University Press, p. 62.

<sup>20</sup> *Cristãos-novos*, a derogatory term used to make a distinction between formerly Jewish or Islamic people who had converted to Christianity and Christians without any identifiable Jewish or Muslim ancestors, were an meaningful example of the latter.

<sup>21</sup> Alexandre, Valentim (1980) 'O liberalismo português e as colónias de África (1820-1839)', *Análise Social*, 61/62, pp. 319-340; Alexandre, Valentim (1998), 'A Viragem para África', in

Several times head of government from the 1830s until the 1870s and minister of various portfolios in many other Cabinets during this period, the Marquis of Sá da Bandeira devoted much energy during his entire political career striving not for a ‘New Brazil’ but rather for a ‘better Brazil’ in Africa. Celebrated by his role in the abolition of slave trade in the Portuguese empire, he designed a broader project for African colonies during his first governmental experience as minister and secretary of state of the Navy and the Overseas. His ‘Draft law to promote the prosperity of the overseas provinces’ was outlined in late 1835.<sup>22</sup> It consisted in sixteen fundamental points. Although three-fourths related to tariffs and commercial relationships between metropole, colonies, and foreign countries, colonial settlement appeared first. For Sá da Bandeira it was crucial that each colony’s general-governor became engaged in the growth of the territory under his administrator, including someone responsible for the promotion of settlement among its staff.<sup>23</sup> Defining the best locations for settlement was a priority and, in his opinion, getting a numerous European population in the colonies was crucial for development.<sup>24</sup> Therefore, migrants from Azores and continental Portugal should be attracted to Africa by providing them paid transport, as well as giving them arable lands and seeds.<sup>25</sup> As Sá da Bandeira later explained in a report to the parliament dated 19<sup>th</sup> February 1836, the heavy investment required by this scheme of Empire-directed migration would be rewarding in the short term, compensating the loss of Brazil:

To assess what the overseas dominions are, we should not consider only what they are now, but also what they can accomplish. (...) Let us promote colonisation with Europeans in Africa, the development of its industry, [and]

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Francisco Bethencourt and Kirti Chaudhuri (eds) *História a Expansão Portuguesa*, Lisbon, Círculo de Leitores, vol.4, pp. 61-85. See also Ramos, Rui (2000), ‘«Um novo Brasil de um novo Portugal». A história do Brasil e a ideia de colonização em Portugal nos séculos XIX e XX’ in *Penélope*, 23, pp. 129-152.

<sup>22</sup> The original manuscript does not indicate the exact date, referring only the year, but Sá da Bandeira was minister and secretary of state of the Navy and the Overseas for the first time from 18<sup>th</sup> November 1835 to 20<sup>th</sup> April 1836. See “Projecto de lei para promover a prosperidade das províncias ultramarinas”, Arquivo Histórico Militar (AHM), DIV/3/18/07/13/04, document 1.

<sup>23</sup> Points one and two., *ibidem*.

<sup>24</sup> See point three, *ibidem*.

<sup>25</sup> *Ibidem*.

the use of its capital; in a short number of years, we will get the great results that we used to obtain from our former colonies.<sup>26</sup>

Nonetheless, the idea of a third colonial empire did not appeal to every one at first. As Valentim Alexandre stressed, there was an initial hesitation of the Portuguese elites to embark on a new colonial venture after Brazil's secession from the empire, which hindered the application of Sá da Bandeira's ambitious project.<sup>27</sup> Two state-directed settlement projects were put into practice only during his fourth appointment as minister of the Navy and the Overseas, almost twenty years later. In 1857, 60 Portuguese people (both men and women) were sent to Pemba, in Northern Mozambique, a project that was partially funded by a public subscription.<sup>28</sup> On the same year, the state also funded an European settlement in Huíla, Angola: at first, only 29 German voluntary settlers (of which 15 were adult men) and 12 Portuguese students of an institution for orphaned and abandoned children – the *Casa Pia* – aged 13 to 18 were transported but the settlement was supplemented with mainly Portuguese people throughout that year.<sup>29</sup> The fact that the Portuguese government had to turn to German settlers first, an aspect that was frequently omitted in the accounts on the Huíla settlement during the 1930s and 1940s for reasons that chapter 2 should have made

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<sup>26</sup> 'Para avaliarmos o que são os domínios ultramarinos, não devemos considerar somente o que actualmente são, mas sim aquilo de que são susceptíveis. (...) Promovamos na África a colonização dos Europeus, o desenvolvimento da sua indústria, o emprego dos seus capitais; e numa curta série de anos tiraremos os grandes resultados que outrora obtivemos das nossas Colónias.' The report has been transcribed in Alexandre, Valentim (1979), *Origens do Colonialismo Português Moderno, 1822-1891*, vol. III of *Portugal no século XIX : antologia de textos históricos*, Lisbon, Sá da Costa Editora, pp. 101-102.

<sup>27</sup> Alexandre, Valentim (1980) 'O liberalismo português e as colónias de África (1820-1839)', *Análise Social*, 61/62, pp. 319-340; Alexandre, Valentim (1998), 'A Viragem para África', in Francisco Bethencourt and Kirti Chaudhuri (eds) *História e Expansão Portuguesa*, Lisbon, Círculo de Leitores, vol.4, pp. 61-85.

<sup>28</sup> The 1857 settlement in Pemba, named Porto Amélia from 1909 to the independence, is often forgotten by literature on European settlement in Portuguese Africa. Romero, Jeronimo (1860), *Suplemento à memória descritiva e estatística do districto de Cabo Delgado: com uma notícia acerca do estabelecimento da colónia de Pemba*, Lisbon, Typographia Universal.

<sup>29</sup> Medeiros, Carlos Alberto (1976), *A Colonização das Terras Altas da Huíla (Angola). Estudo de Geografia Humana*, Lisbon, Instituto de Alta Cultura, pp. 148-152.

clear,<sup>30</sup> illustrates the lack of interest of Portuguese migrants in Africa. Yet, this widespread indifference explains only to a certain degree why Portuguese political elites were hesitant about the investment in colonial settlement. The reasons were manifold.

To begin with, the political and social situation within the boundaries of the metropole itself was extremely fragile. The Napoleonic wars and the 1820 Liberal Revolution had been followed by the Civil War (1828-1834) and the Patuleia War (also known as the Little Civil War, 1846-1847), as well as by an array of revolutions and revolts. Instability continued in peacetime: few governments lasted more than one year during the nineteenth century. Would tumultuous Portugal have the necessary strength to rebuilt the metropole and simultaneously built a new colonial empire in a continent where Portuguese presence at the time was based on little more than slave trade? On the other hand, would little Portugal have the strength to subsist as an independent nation if not investing in a new colonial empire or would it become a British protectorate or be absorbed by neighbour Spain? Furthermore, the economic situation was also alarming. The independence of Brazil entailed the loss of not only the most important outlet for the metropolitan production but also of the main input of capital to the metropolitan economy, which pushed for the quest for new markets and new revenues. Conversely, building a new colonial empire would necessary drain the already scarce funds from the metropole, which was itself in need. In short, did colonialism pay or its costs outweighed its gains?

These doubts were long lasting. In the 1870s and early 1880s some contemporary leading intellectuals influenced by socialist reformism still considered the time had come for Portugal to leave the colonial stage, being the fiercest critics of a third colonial empire in Africa. Antero de Quental, a pioneer in the introduction of Proudhon's ideas in Portugal, overtly defended in 1871 that overseas expansion was one of the causes of Iberian societies' backwardness as they diverted people and resources

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<sup>30</sup> Nevertheless, references to these settlers' nationality can be found in Henrique Galvão's paper at the 1940 Colonial Congress and in the preamble of the 1939 Minister of Colonies Francisco Vieira Machado's aborted decree on settlement. Galvão, Henrique (1940), 'Zonas colonizáveis de Angola e soluções aconselháveis para intensificar a sua colonização', *Congressos do Mundo Português*, XV Volume, *Memórias e comunicações apresentadas ao Congresso Colonial (IX Congresso)*, 2<sup>nd</sup> Tome, II Section, Lisbon, Comissão Executiva dos Centenários, p. 276. Machado, José Vieira (1940), *Colonização. Projectos de Decretos*, Lisbon, Agência Geral das Colónias, p. 13.

from the metropole and encouraged a ‘warrior spirit’ of conquest and domination rather than a ‘work spirit’ that enabled modernisation.<sup>31</sup> Also Joaquim Pedro de Oliveira Martins, who not only excelled in intellectual life but also held a number of public and political positions, considered that the colonies were useless relics of the past. In his harsh words, the eastern possessions ‘do not matter for anything’, Timor ‘is nothing’, and the African colonies are ‘one of the most serious [problems] of the Portuguese social economy’.<sup>32</sup> For him, the metropole was ‘the best of our colonies’, advocating the alienation of the empire in order to focus on continental Portugal.<sup>33</sup>

The intensification of European rivalries in Africa assuaged these reservations, drawing attention to the need for the occupation of the claimed African territories. Therefore, in early 1884, the Portuguese government initiated a process of sponsored migration to Southern Angola, attempting to recruit up to 50 settlers in the metropole. The edict called for ‘valid and well-mannered men, under the age of 35, who are farmers or skilled workers whose art was essential to farming (carpenters, masons, smiths) and preferably married’.<sup>34</sup> Each settler would be granted a generous sum of money, free transport to Angola, tools for agriculture and basic household goods, as well as support from the Board for the Protection of Migrants upon their arrival. Although the destination, Moçamedes, was advertised as ‘very healthy, rich, and with all the conditions of the best European countries’, the offer elicited little interest, except in Madeira. Madeiran people’s interest in this first project motivated a second sponsored

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<sup>31</sup> Quental, Antero (2005 [1871]), *Causas da Decadência dos Povos Peninsulares nos últimos três séculos*, Lisbon, Editorial Nova Ática, pp. 27 and ff.

<sup>32</sup> Oliveira Martins, J.P. (1880), *O Brazil e as colonias portuguesas*, Lisbon, Bertrand, p.180, p.182, pp. 193-194.

<sup>33</sup> Oliveira Martins, J.P. (1880), *O Brazil e as colonias portuguesas*, *op. cit.*, p. 229. See also Alexandre, Valentim (1996). ‘Questão Nacional e Questão Colonial em Oliveira Martins’, *Análise Social*, 135, pp. 183-201; Ramos, Rui (1997), *Tristes Conquistas: a Expansão Ultramarina na Historiografia Contemporânea (c. 1840-c.1970)*, Lisboa, ICS- UL (Unpublished dissertation) and Ramos, Rui (2000), ‘«Um novo Brasil de um novo Portugal». A história do Brasil e a ideia de colonização em Portugal nos séculos XIX e XX’ in *Penélope*, 23, pp. 129-152.

<sup>34</sup> ‘Devem ser homens válidos, morigerados, de idade não superior a 35 annos, agricultores, ou operários de officios inherentes aos trabalhos agrícolas (carpinteiros, pedreiros, ferreiros, etc), preferindo-se casados’. The edict as made public in Braga, in Northern Portugal, can be found in AHU, Secretaria de Estado da Marinha e Ultramar - Direcção Geral do Ultramar (SEMU-DGU), 1L, Angola, Processo 1079 - Colonização (1884-1891), ‘Edital do Governador Civil de Braga’, 14<sup>th</sup> February 1884.

migration later that year, aiming naturals from this Atlantic archipelago only. By the time representatives of European governments initiated the West Africa Conference's meetings in Berlin, 241 people of both genders, including children, were leaving their native Madeira to settle in a valley of the Huíla Plateau, more exactly in Lubango (later 'Sá da Bandeira', returning to the original name after Angola's independence).<sup>35</sup> Another state-sponsored migration project took place one year after Portugal had been forced to withdrawal from occupying the territory between Angola and Mozambique as a consequence of the 1890 British Ultimatum: large contingents of settlers were sent to both colonies, even though they lacked preparation and support on their arrival, forcing the repatriation of many of them little time after.<sup>36</sup>

Although the scramble for Africa facilitated a consensus over the continuity of the Portuguese colonial mission, agreement regarding the methods of colonisation to be pursued was not reached. The creation of 'islands of white' – to use Dane Kennedy's expression<sup>37</sup> – in Portuguese Africa remained open to discussion. Cláudia Castelo identified two main clashing trends in the debate on colonial settlement and migration in the late nineteenth century. On the one hand, there were the advocates of state's intervention in the encouragement of migration to the colonies, facilitating settlement in Africa; on the other hand, the detractors who believed Africa was not suitable for the establishment of settlement colonies, an idea that was reinforced by the fiasco of previous attempts. Oliveira Martins was a well known of this second trend. Despite refraining his discourse on the alienation of the colonies – at least publicly –, he remained opposed to large-scale white settlement in Africa. When the Geographical and

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<sup>35</sup> Of which 20 embarked illegally. The numbers, which are based on the medical report of the vessel that made the transportation, are gathered by Cristiana Bastos. See Bastos, Cristiana (2008), 'Migrants, Settlers And Colonists: The Biopolitics of Displaced Bodies', *International Migration* 46(5), pp. 27- 54. See also Medeiros, Carlos (1976), *A Colonização das terras altas do Huíla*, Lisbon, Junta de Investigações do Ultramar and Rodrigues, Miguel Jasmins (2000), 'A Colonização Madeirense nas Terras Altas da Huíla', in Maria Emília Madeira Santos (org), *A África e a instalação do sistema colonial (c.1885-c.1930): III Reunião Internacional de História de África*, Lisbon, Instituto de Investigação Científica Tropical, Centro de Estudos de História e Cartografia Antiga, pp. 693-704.

<sup>36</sup> On this precipitate and unsuccessful attempt, see Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, Oporto, Edições Afrontamento, p. 56.

<sup>37</sup> Kennedy, Dane (1987), *Islands of white: settler society and culture in Kenya and Southern Rhodesia, 1890-1939*, Durham, Duke University Press.

Commercial Society of Oporto, of which he was president, received a request from a Republican journalist, Narciso Feyo, to support a project of colonisation in the Huíla Plateau in late 1884, he immediately expressed his reservations.<sup>38</sup> In his view, Narciso Feyo's project, which was praised in the press as a patriotic initiative to overcome the shortcomings of official solutions, was a 'disgraceful and ridiculous attempt of engagement of settlers' that would have led 'hundreds of unfortunate people to die in the African hinterlands.'<sup>39</sup> European settlers could not – and should not – compete with African labourers. The former were reserved for a managerial role, leading the latter in the exploitation of natural resources of the colonies to better extract their riches. From this perspective, the only useful migrants to Africa were people with capital who could hire African workers, which not only were inexpensive but were also inured to the rough climate. As Oliveira Martins summarised in an article in *O Africano*, 'the Portuguese should exploit Africa, not colonise it'.<sup>40</sup>

The divergence of perspective, combined with different opportunities in the access to political power, drove policies of European settlement in Portuguese Africa from the late nineteenth century. While Mozambique was governed by many sceptics who shared Oliveira Martins's vision on the unfeasibility of settlement colonies in Africa, various enthusiastic supporters of European settlement reached power in Angola.<sup>41</sup> Despite the latter's efforts to create a white Portuguese Africa, their idealised projects had limited implementation. In the metropole, successive changes of

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<sup>38</sup> The Minutes of the discussion on Narciso Feyo's project to Africa at the Geographical and Commercial Society of Oporto on 7<sup>th</sup> and 20<sup>th</sup> November 1884 were published in the Society's periodical. See *Boletim da Sociedade de Geografia Comercial do Porto*, 10 (2<sup>nd</sup> Series), February-March 1885, pp. 482-483. On the Geographical and Commercial Society of Oporto, see Cardoso, Maria Teresa Cirne (2000), *Perspectivas do Colonialismo Nacional, A Sociedade de Geografia Comercial do Porto (1880-1888)*, Oporto, Faculdade de Letras da Universidade do Porto (Unpublished dissertation).

<sup>39</sup> Oliveira Martins' report for the year 1884 in *Boletim da Sociedade de Geografia Comercial do Porto*, 1 (3<sup>rd</sup> Series), May 1886, p. 4.

<sup>40</sup> *O Africano*. Jornal publicado em benefício da colónia portuguesa em África, December 1884, p. 4.

<sup>41</sup> Namely António Enes (1895), Mouzinho de Albuquerque (1896-1897), Álvaro da Costa Ferreira (1898-1900), and Brito Camacho (1921-1923), in Mozambique, and Paiva Couceiro (1907-1909), Norton de Matos (1912-1915 and 1921-1924), and Vicente Ferreira (1926-1928) in Angola.

government until the establishment of the military dictatorship prevented the adoption of a clear guideline. Official attitudes towards colonial migration and settlement lurched from its encouragement to its discouragement, if not left out from the political agenda.<sup>42</sup>

From 1930 onwards, the debate about colonial migration and settlement gained a new momentum.

#### **4.1.1. Closed doors and the end of the American dream**

One of the reasons that contributed to the intensification, diversification, and spread of the debate on colonial migration and settlement was the adoption of increasingly restrictive immigration legislation in the countries that traditionally absorbed most of the Portuguese migrants. Portugal was a country of emigration. From 1890 to 1930 nearly one and half million of Portuguese left their homeland.<sup>43</sup> This period witnessed the effective occupation of the Portuguese African colonies and military subjugation of their native populations. Nevertheless, Brazil remained the first choice of the Portuguese migrant, absorbing 93% of the Portuguese emigrants during the last quarter of the nineteenth century. From 1900 to 1929, this value dropped to about 70%, not as a consequence of the reduction of emigration contingents or decreased interest in the former colony, but rather due to the diversification of destinations. The USA, but also to Canada and Latin American countries such as

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<sup>42</sup> Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, Oporto, Edições Afrontamento, especially pp. 49-54 and pp. 61-80.

<sup>43</sup> Pereira, Miriam Halpern (1993), 'Liberdade e contenção na emigração portuguesa (1850-1930)', in Silva, Maria Beatriz Nizza da et al. (eds), *Emigração/Imigração em Portugal. Actas do Colóquio Internacional sobre Emigração e Imigração em Portugal (séc. XIX-XX)*, Lisbon, Edições Fragmentos, p. 14. See also Rocha-Trindade, Maria Beatriz and Jorge Arrosteia (1986), *A Emigração*, Lisbon, Centro de Estudos Judiciários and Peixoto, João (1999), 'A emigração' in Francisco Bethencourt and Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, vol. V. *Último Império e Recentramento (1930-1998)*, Lisbon, Circulo de Leitores, pp. 152-181.

Argentina, attracted more and more Portuguese immigrants.<sup>44</sup> Madeira's peasants, who had been migrating as indentured labourers to sugar plantations in the British islands in the Caribbean since the emancipation of slaves, used the network of the Portuguese community established in Trinidad to use this island as a platform to neighbouring Venezuela after the discovery of the major oil wells in the region in 1922.<sup>45</sup> American destinations were also the most popular amongst Cape Verdeans. Struggling to make a living in the drought-stricken islands, the population of the 'most civilised' Portuguese colony in Africa massively emigrated since the mid-nineteenth century. The USA and, to a lesser extent, Argentina and Brazil, were preferred to the other Portuguese colonies.<sup>46</sup>

Although anti-immigration legislation had been adopted since the late nineteenth century, closed doors policies reached its zenith after the 1929 world crash. In December 1930, the newly established dictatorial government of Getúlio Vargas in Brazil approved a new bill limiting the entrance of foreign citizens. In force from 1<sup>st</sup> January 1931, it suspended for one year the granting of visas to foreigners travelling in third class. Non-Brazilian nationals were not allowed to enter Brazilian borders unless they were already established in Brazil and were returning for a short period abroad or had been requested by the Ministry of Labour for agricultural services, held a 'bilhete de chamada' (a certified invitation letter to work in the country) issued by private employers, or were grouped into a family of farmers. In addition, employers became obliged to have at least two thirds of inborn Brazilians among their employees or, in case it was not possible, they were encouraged to give priority to naturalised people and

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<sup>44</sup> Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, Oporto, Edições Afrontamento, pp. 170-172. For an historical overview of Portuguese emigration to Brazil, see Sousa, Fernando, Ismênia de Lima Martins and Izilda Matos (2009) (eds.), *Nas duas Margens: Os Portugueses no Brasil*, Porto, Edições Afrontamento. On Portuguese emigration to the USA, see Baganha, Maria Ioannis (1990), *Portuguese Emigration to the United States, 1820-1930*, New York – London, Garland Publishing Inc.

<sup>45</sup> Teixeira, Vítor (2008), *Entre a Madeira e as Antilhas. A Emigração para para a Ilha de Trindade. Século XIX*, Funchal, Universidade da Madeira (Unpublished dissertation).

<sup>46</sup> Galvão, Henrique and Carlos Selvagem (1950), *Império Ultramarino Português. Monografia do Império*, vol. I, pp. 153-154. For an evolution of the Cape Verdean immigration to the USA, see Halter, Marilyn (1993), *Between Race and Ethnicity: Cape Verdean American Immigrants, 1860-1965*, Urbana, University of Illinois Press.

eschew foreigners.<sup>47</sup> While an average of 30 thousand Portuguese immigrants entered Brazil every year during the 1920s, after the adoption of the restrictive legislation the number dropped to less than a third.<sup>48</sup>

The anti-immigration legislation was refined in 1934, with the introduction of a system of national quotas that had been outlined in accordance with the collective political willingness of ‘whitening’ Brazilian population and promoting its internal homogenisation.<sup>49</sup> As efforts to assimilate foreign communities – the so-called ‘ethnic or racial cysts’ – were intensified, language and cultural affinity granted Portuguese migrants some advantage over migrants from other origins, especially after Getúlio Vargas’s power consolidation, which culminated with the establishment of Brazilian *Estado Novo* in 1937 and subsequent closer relations with the Portuguese *Estado Novo*.<sup>50</sup> In fact, the preference for Portuguese nationals for new agricultural settlements when Brazilian nationals were not in sufficient number became inscribed in immigration laws from 1938 onwards.<sup>51</sup> However, the number of new immigrants allowed remained much lower than before.

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<sup>47</sup> Decree 19.482, 12<sup>th</sup> December 1930, *Coleção das Leis da República dos Estados Unidos do Brasil de 1930, Atos da Junta Governativa Provisória e do Governo Provisório* (Outubro a Dezembro), Rio de Janeiro, Imprensa Nacional, vol. II, p. 82-85.

<sup>48</sup> Only 8152 Portuguese immigrants in 1930 and 8499 in the following year. The average was calculated with data from Brazilian official statistics collected in Lobo, Eulália (1994), *Portugueses em Brasil en el siglo XX*, Madrid, Editorial Mapre, p. 32.

<sup>49</sup> Geraldo, Endrica (2009), ‘A «lei das cotas» de 1934: controle de estrangeiros no Brasil’, *Cadernos AEL*, 15 (27), pp. 173-209. See also Westphalen, Cecilia Maria and Altiva Pilatti Balhana (1993), ‘Políticas e Legislação imigratórias brasileiras e a imigração portuguesa’ in Silva, Maria Beatriz Nizza da et al. (eds), *Emigração/Imigração em Portugal. Actas do Colóquio Internacional sobre Emigração e Imigração em Portugal (séc. XIX-XX)*, Lisbon, Edições Fragmentos, pp. 17-25 and Paulo, Heloísa (2000), *Aqui também é Portugal. A Colónia portuguesa do Brasil e o Salazarismo*, Coimbra, Quarteto Editora. Mendes, José (2010), *Laços de Sangue. Privilégios e Intolerância à Imigração Portuguesa no Brasil (1822-1945)*, Oporto, Fronteira do Caos e CEPES.

<sup>50</sup> On Getúlio Vargas nationalisation campaigns see Seyferth, Giralda (1999), ‘Os imigrantes e a campanha de nacionalização do Estado Novo’ in Dulce Pandolfi (ed.), *Repensando o Estado Novo*, Rio de Janeiro, Fundação Getúlio Vargas, ch. 12, pp. 199-228; Geraldo, Endrica (2009), ‘O combate contra os “quistos étnicos”: identidade, assimilação e política imigratório no Estado Novo’, *Locus: revista de história*, 15 (1), pp. 171-187.

<sup>51</sup> Article 40<sup>th</sup>, Decree 406, 4<sup>th</sup> May 1938, *Coleção de Leis da República dos Estados Unidos do Brasil de 1938, Decretos-Leis (Abril a Junho)*, Rio de Janeiro, Imprensa Nacional, Vol. 2, pp. 92-

In the USA, the second most important destination for Portuguese emigrants, restrictive measures were also adopted. Although restrictive legislation was expanded in the new era of de-globalisation after the First World War, regulations and laws mainly intended to discourage the entry of – or to entirely exclude – people of Asian countries, especially the Chinese, had been adopted earlier. Despite being best known as the Asiatic Barred Zone Act, the Immigration Act of 1917 did not merely exclude all Asian peoples from the defined geographical region to be debarred. It had already instituted literacy tests for immigrants of all origins, creating difficulties to Portuguese unschooled farmers who attempted to find a better life in the USA. In 1921, a temporary quota system was introduced, being replaced by a permanent and even more restrictive law in 1924. While the Emergency Quota Act of 1921 allowed the entrance of 357.801 immigrants per year, the Immigration Act of 1924 reduced this number to only 150.000 people. The quotas per national origin, which in 1921 corresponded to 3% of the number of foreign born citizens of each origin that were settled in the United States at the moment of the US Census of 1910, were cut to only 2 % and calculated in agreement with the US Census of 1890.<sup>52</sup> As explained by David Reed, senator from Pennsylvania and co-author of the Immigration Act of 1924, the reason for choosing the 1890 census as a reference had to do with the fact that it bore ‘a closer resemblance to the national origins of our whole population today than does any other census’.<sup>53</sup> Grounded on eugenicist principles to preserve the ‘American racial type’, this choice significantly changed the complexion of the allowed immigration, as the maps that complemented David Reed’s article in *The New York Times* clearly illustrated.

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103. The same decree established that 80% of each national quota was reserved to farmers and agricultural technicians.

<sup>52</sup> ‘An Act to Limit the Immigration of Aliens into the United States, and for Other Purposes’, *The American Journal of International Law*, 18 (4), *Supplement: Official Documents*, pp. 208-227

<sup>53</sup> Reed, David (1924), ‘America of the Melting Pot Comes to end’, *New York Times*, 27<sup>th</sup> April 1924, p. 2.

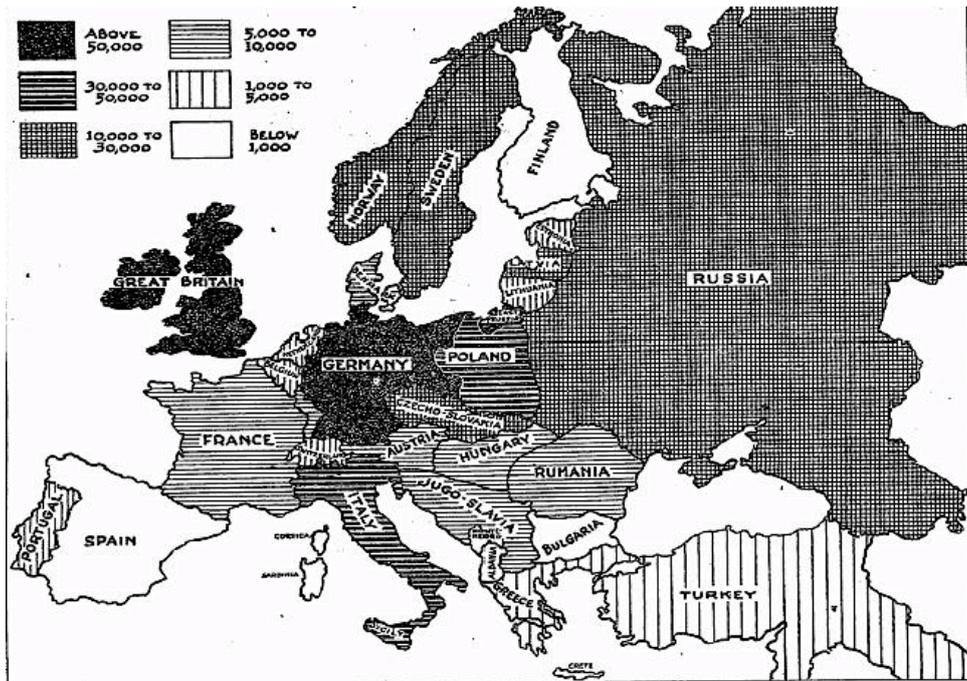


Figure 4.1. Allowed migration flow by country of origin in accordance with the Emergency Immigration Act of 1921.

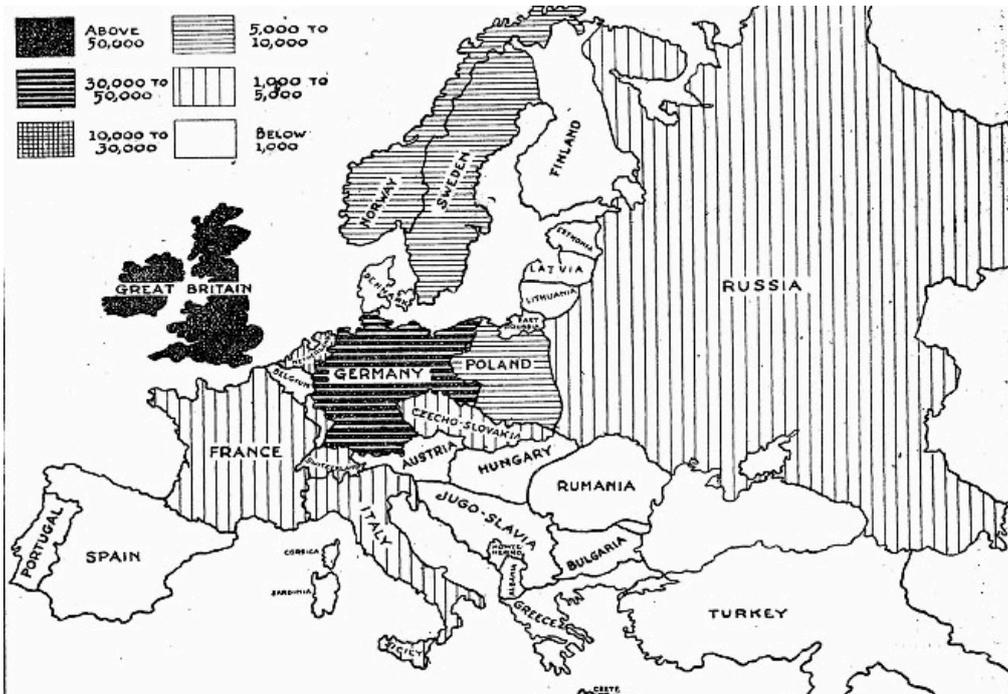


Figure 4.2. Allowed migration flow by country of origin in accordance with the Immigration Act of 1924.

Source: *New York Times*, 27<sup>th</sup> April 1924, p. 2

The figures are self-explanatory. The definition of who were the undesirable migrants created limitations not only to non-European migrants but also to Southern Europeans and Eastern Europeans. The Portuguese – as Italians, Spaniards, Russians or Poles – were perceived as a ‘lesser race’, which was harmful to the Saxon base in which America had been founded.<sup>54</sup> As Matthew Frye Jacobson noted, it was the culmination of a long process of fabrication of the concept of Whiteness in the USA, a process in which the interrogation whether Jews, Italians, Greeks, Slavs, Latvians, Spaniards, and Portuguese were part of the Caucasian race or not played an important role.<sup>55</sup> Therefore, while 2.465 Portuguese nationals were allowed per year in line with the Emergency Quota Act of 1921, after the 1924 law entered into force that number was reduced to 503, being amended to only 440 people in 1929.<sup>56</sup>

Projections based on mere arithmetic analysis gave the contemporaries an appalling vision on the effects of restrictive legislation on Portuguese emigration to Brazil and the United States. Together, Brazil and the United States were closing their doors to about 25 thousand Portuguese per year that would have been admitted if anti-immigration legislation had not been adopted. An article published in a mainstream newspaper in 1937 went so far as to claim that half million of Portuguese had been barred from entering Brazil from 1930 to date due to the restrictions. The author, Nuno Simões, did not explain how he reached his dramatic estimation. Nevertheless, being a former minister of Commerce during the First Republic turned journalist, commercial

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<sup>54</sup> On the concept of ‘lesser races’ and the classification of who should be entitled to enter in the United States, see Stern, Alexandra Minna (2005), *Eugenic Nation: Faults & Frontiers of Better Breeding in Modern America*, Berkeley and Los Angeles, University of California Press. See also Ngai, Mae N. (2004), *Impossible Subjects: Illegal Aliens & the Making of Modern America*, Princeton, Princeton University Press; Hattam, Victoria (2007), *In the Shadow of Race: Jews, Latinos, and Immigrant Politics in the United States*, Chicago, University of Chicago Press. Decker, Robert (2013), ‘The Visibility of Whiteness and Immigration Restriction in the United States, 1880-1930’, *Critical race and Whiteness Studies*, 9 (1).

<sup>55</sup> Jacobson, Matthew Frye (1998), *Whiteness of a Different Color: European Immigrants and the Alchemy of Race*, Cambridge, Harvard University Press.

<sup>56</sup> ‘No. 111. Immigration Quotas and Aliens Admitted and charged to Quotas. By Nationality, Years Ended. 1922 to 1928’ and ‘No. 117. Immigration quotas on basis of national origin’, *Statistical Abstract of the United States. 1929*, Washington, United States Government Printing Office, p.102 and p. 105, respectively. For an evolution of American immigration policies, see also Daniels, Roger (2004), *Guarding the Golden Door: American Immigration Policy and Immigrants Since 1882*, New York, Hill and Wang.

consulter, and industrial lobbyist, as well as a scholar of Portugal-Brazil relations, he was seen as an expert in the topic, which granted additional authority to his projection.<sup>57</sup> Estimations of this kind were reductive – if not misleading –, as they ignore many factors that are liable to vary or change. In fact, although metropolitan population continued growing in the 1930s and 1940s, the population growth rate remained exactly the same as during the 1920s since declining birth rates counterweighed the decrease observed in emigration.<sup>58</sup> Unaware of this unanticipated declining of the natural increase rate, concerns about what to do with the massive surplus population that could not migrate to America were amplified. In this context, the idea about directing the usual migration flows to Portuguese Africa that had been under question since the mid-nineteenth century became more and more discussed.

#### **4.1.2. Fears of immigrant invasion and European colonial claims**

When North and South American countries closed their doors to immigration, Portugal was not the only European country in need of new destinations for its emigrants. The number of foreign settlers in the Portuguese empire started increasing exponentially, especially in Angola,<sup>59</sup> concerning Portuguese authorities and colonial intelligentsia. Coronel Carlos Roma Machado introduced the topic in the National Colonial Congress in 1930. Roma Machado, who had presented a paper identifying the

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<sup>57</sup> *O Primeiro de Janeiro*, 12<sup>th</sup> April 1937, p. 1. It is important to keep in mind Portugal's dimension to assess the extent of Nuno Simões's half million estimation. By the time he wrote, the most recent Census indicated that the Portuguese population was less than 7 million. Miranda, Sacuntala (1992), 'A Evolução Demográfica' in Rosas, Fernando (ed.), *Portugal e o Estado Novo (1930-1960)*, vol. XII. Serrão, Joel and A.H. de Oliveira Martins (eds.), *Nova História de Portugal*, Lisbon, Editorial Presença, ch. 5. pp. 259-271

<sup>58</sup> At an annual growth rate of 1,3%. *Idem*, p. 259.

<sup>59</sup> See the charts about the movement of foreigners in Angola and Mozambique from 1925 to 1947 in AHU, MU, DGAPC, 1H, nº 1269.

‘colonisable zones’ suitable for European settlement in Angola and Mozambique at the previous colonial congress in 1924,<sup>60</sup> called for action without further ado as Italians, Germans, and Belgians had already started occupying the best locations in Angola. Besides the economic disadvantages of losing the control of the most fertile soils and the regions with better climate for Europeans, foreign influence would endanger the Portugueseness of the colony.<sup>61</sup> For Roma Machado, there was only an effective way to stop this ‘furtive alien invasion’: intensive and extensive settlement with nationals from the metropole, even though it would require great sacrifices from the metropolitan government. Although different perspectives on the role that the state should play in organising settlement coexisted amongst participants of the colonial congress, the urgency of settlement with nationals from the metropole was not questioned. It was perceived as ‘the only way to defend ourselves from all the greed and colonial ambitions in the world’.<sup>62</sup> Similar concerns prompted a study by the African Commission of the Geographical Society of Lisbon in 1932, which resulted in a decree proposal to curb foreign emigration in Angola by placing fifty families of Portuguese settlers in strategic locations.<sup>63</sup>

It is important to keep in mind that the reinvigorated discussion on migration to the colonies and settlement took place in a context of colonial claims and the quest for a redistribution of African possessions in order to facilitate non-colonial powers access to outlets for surplus population, as well as to raw materials and new markets. As shown in

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<sup>60</sup> Roma Machado, Carlos (1924), ‘Zonas colonizáveis, estudo de adaptação de europeus’ in *II Congresso Colonial Nacional de 6 de Maio de 1924. Teses e Actas das Sessões*, Lisbon, Sociedade de Geografia de Lisboa. See also his previous essay on settlement in Southwest Angola: Roma Machado, Carlos (1919), *Colonização do planalto de Huíla e Mossamedes: o seu desenvolvimento agrícola e industrial*, Lisbon, Sociedade de Geografia de Lisboa.

<sup>61</sup> Roma Machado, Carlos (1934 [1930]), ‘Colonização da raça branca portuguesa em Angola. Urgência da sua efectivação para a nossa preponderância e autonomia na mesma colónia’ in *III Congresso Colonial Nacional de 8 a 15 de Maio de 1930. Actas das Sessões e Teses*, Lisboa, Sociedade de Geografia de Lisboa, pp. 3-4., pp. 14-16.

<sup>62</sup> The words, which were much applauded, are from Américo Chaves de Almeida, *III Congresso Colonial Nacional de 8 a 15 de Maio de 1930. Actas das Sessões e Teses*, Lisboa, Sociedade de Geografia de Lisboa, p. CLXII. For the debate on Roma Machado’s paper, see *Ibidem*, pp. CLXI-CLXVIII and CLXXII-CLXXX.

<sup>63</sup> See Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., p. 87

chapter 2, rumours about negotiations at the expenses of Portuguese empire were being held in international diplomatic circles were at their height at the time. Hence accusations that Portugal did not have enough people or resources to civilise its huge colonial empire had to be contested. Minister of Colonies Armindo Monteiro seized the International Colonial Institute's XXII biennial session, assembled in Lisbon from 18<sup>th</sup> to 20<sup>th</sup> April 1933, as an opportunity to do so. European overpopulation, emigration to Africa, and colonial settlement and progress dominated his speech at the inaugural session. Before making reference to the public works to claim that Portugal had 'the honour of standing in the van of those nations that have most devotedly broken the path for civilisation through the savage bush of Africa', he elaborates on the number of settlers in a comparative perspective.<sup>64</sup> It is worth quoting at length his defence of the Portuguese colonisation with nationals from the metropole:

In 1913, only 24.389 Europeans inhabited the 3.000.000 square kilometres of the German colonies around the globe. According to credible data, the large Italian colonies in Africa are now inhabited by 54.500 Europeans. The 7.000.000 square kilometres of French possessions in West and Equatorial Africa, the Cameroon, and Madagascar are inhabited by 49.000 Europeans and *assimilés*. The Belgian Congo, with 2.336.000 square kilometres, totalled 20.000 Europeans. The Gold Coast, Sierra Leone, Kenya, Uganda, Tanganyika, Zanzibar, Nyasaland and Northern Rhodesia are inhabited by 42.000 Europeans. *Currently, no less than 60.000 Europeans and more than 120.000 assimilados inhabit the Portuguese colonies in Africa.*

If we compare these numbers while taking into account the surface and black populations to which they relate, the significance of the Portuguese colonising effort expressively stands out. For every 10.000 blacks, there were 20 whites in the aforementioned German colonies, 25 in the British ones, 22 in the French ones and 24 in Congo. *In the Portuguese colonies, there are 80.* While amongst the nations previously mentioned, the most favoured had 24 Europeans per 1.000 square kilometres, *Portugal had 30.* Besides, most of them are

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<sup>64</sup> Armindo Monteiro (1933), *Os Portugueses na colonização contemporânea: nobreza colonial*, Lisbon, Agência Geral das Colónias, p. 14.

[Portuguese] nationals, as the foreign population is still insignificant in our colonies, despite the facilities to settle that we offer them.<sup>65</sup>

Statistics presented by the Minister of Colonies to his international audience were impressive. Armindo Monteiro did not inflate the number of Europeans in Portuguese Africa: based on posterior official population census, it has been estimated that Angola and Mozambique alone had nearly 56.000 Portuguese Europeans around the date of Monteiro's speech.<sup>66</sup> Nevertheless, Armindo Monteiro did play with numbers in order to paint a more favourable portrait of white settlement in Portuguese Africa. His criteria for selecting data on foreign colonies seemed to have been inspired by their suitability to back the message he intended to pass. The anachronistic reference to pre-war German colonial empire stands out: it can be read as a suggestion that, if Germany did not excel others when it had colonies, the argument of overpopulation to justify current claims for colonies was baseless.<sup>67</sup> The exclusion of some foreign colonies with a numerous European population is puzzling as well and can only be justified by the fact that its mention would have outshined the Portuguese effort.<sup>68</sup> After presenting his data, Armindo Monteiro concluded that

it seems that Portugal has succeed, *better than any other colonial power*, in making its population interested in the development of its tropical possessions.

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<sup>65</sup> Armindo Monteiro (1933), *Os Portugueses na colonização contemporânea: nobreza colonial*, Lisbon, Agência Geral das Colónias, pp. 11-12. The English language edition of Monteiro's speech published three years later not only omitted some data but also rounded down the numbers of Europeans in non-Portuguese colonies. See Monteiro, Armindo (1936) *The Portuguese in Modern Colonisation*, Lisbon, Agência Geral das Colónias, pp. 17-18.

<sup>66</sup> Combining official census data with Cláudia Castelo's analysis of the arrival and departure of Portuguese nationals for both Angola and Mozambique, there were about 33.000 Portuguese settlers in Angola and 22.800 in Mozambique in 1933. See Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., pp. 90, 97, and 98.

<sup>67</sup> In fact, the European population in pre-First World War Portuguese colonial empire was not far from the one in pre-war German colonial empire mentioned by Armindo Monteiro. See Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., p. 59.

<sup>68</sup> For instance, Southern Rhodesia alone counted 49.910 European settlers in 1931. Its inclusion would have doubled the number of European settlers in sub-Saharan Africa under British rule indicated by Armindo Monteiro. See Gann, Lewis H. and Peter Duignan (1962), *White settlers in tropical Africa*, London, Penguin, p. 159.

A country with a small population had results *that others did not achieve*, despite their huge population.

It is said – whether it is true or not – that Bismarck once declared that Portugal is a country with colonies but without colonial settlers. The numbers positively belie this opinion, which was spread in the world and originated many unfair judgments about the colonial activity of my country.<sup>69</sup>

Convincing the international community that Portugal was a country with colonies and with colonial settlers in a context of increasing pressure to colonise and civilise required more than the Minister of Colonies' words. Military conquest and occupation that had fulfilled the requirements of effective occupation of African territories at the time of the Scramble for Africa were now deemed insufficient by the renewed discourse of civilisation and valorisation of the colonies. Moreover, rumours about interests on and negotiations over the Portuguese colonies had higher visibility in Portuguese mass media than ever before. This extra visibility, together with the aforementioned mounting Malthusian fears, pushed the topic of colonial settlement for a broader debate on a regular basis, categorically inscribing it into the domestic agenda. As before, defining the best course of action was not undisputed, though. Different ideas about priorities and methods and different imaginings of the New Portugal to be built in Africa coexisted.

## **4.2. Tomorrow's Greater Portugal: Between Tradition and Modernity in Portuguese Africa**

We also have excess population eager to migrate; we have many thousands of families, country folk, struggling with poverty because they do not have bread. Why should we not use them for the occupation of the lands which others

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<sup>69</sup> Armindo Monteiro (1933), *Os Portugueses na colonização contemporânea: nobreza colonial*, Lisbon, Agência Geral das Colónias, p. 11-12. Emphasis added.

aspire? (...) Let us occupy the land with Lusitanian people before foreigners do it. Portuguese, it is your duty to populate Angola and Mozambique!<sup>70</sup>

The previous quotation, which touches on concerns with both emigration and foreign menaces, is part of a text on colonial settlement authored by Coronel João Alexandre Lopes Galvão, a board member of the Geographic Society of Lisbon who had made career as a military, civil, and mining engineer in Mozambique and Angola. Although he was an acclaimed colonial expert and recurrent contributor to colonial intelligentsia's gatherings and publications, this text was not published in one of the main periodicals aimed to a specialised public but rather in *A Voz das Colónias*, a short-lived fortnightly periodical entirely devoted to colonial issues but written in an accessible, non-technical language with ordinary people in mind. In this article, he defended that the Portuguese were wasting precious time. Multiplying the number of Portuguese people in Angola and Mozambique, which he would later lyrically describe as 'preparing the stones for the foundations of the grand building that tomorrow's Greater Portugal will be'<sup>71</sup> – was urgent. There is little original in his concluding passionate call for migration to African colonies as a patriotic act.

The idea that Portuguese migrants had the duty to contribute not only for the defence but also for the development and civilisation of parcels of their own nation instead of migrating abroad (and subsequently making part of the enrichment and empowerment of other nations) was widespread. Africa was frequently promoted as a panacea for Portugal's economic problems. Descriptions of Portuguese Africa, especially Angola, shared a set of images stressing its vastness, emptiness of people and plentifulness of natural resources. The suggestion that Africa was 'the extremely fecund

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<sup>70</sup> 'Ora nós também temos excedente de população, ansiosa por emigrar. Temos muitos milhares de famílias, gente do campo, que luta com a miséria porque lhe escasseia o pão. Porque não havemos de utilizá-los para a ocupação das terras que os outros ambicionam? (...)Ocupe-se a terra com gente lusa, antes que gente estranha o faça. Portugueses! É vosso dever povoar Angola e Moçambique.' *A Voz das Colónias*, 25<sup>th</sup> June 1933, p. 4.

<sup>71</sup> 'Multiplicar em angola e multiplicar em Moçambique as povoações de Europeus (...) é preparar as pedras para o alicerceamento do grande edificio que será o Portugal de Amanhã', *Ultramar. Orgão oficial da Exposição Colonial*, 10, 15<sup>th</sup> June 1934, p. 9.

womb of the world',<sup>72</sup> a continent of 'inexhaustible' or 'immeasurable' resources',<sup>73</sup> fuelled the Eldorado myth that Henrique Galvão criticised so vehemently in *Em Terra de Pretos*, as mentioned in the introduction of this chapter. From the 1934 Colonial Exhibition in Oporto onwards, this view echoed more and more frequently in mainstream mass media. As Gama Ochoa summed up in *O Primeiro de Janeiro*, 'the national territory can largely meet the vital needs of all the Portuguese people' but only through the colonial empire: 'Portuguese people must decidedly turn their eyes to the Empire. All our hopes should be in the empire'.<sup>74</sup> Nevertheless, African riches were asleep and 'only the intelligent and persistent effort of the Portuguese settler can break the spell and wake them up from its millennial sleep'.<sup>75</sup> The underlying idea here was that development would be possible only when a significant number of Europeans settled in the colonies. Africans were perceived as incapable to exploit their lands by themselves without European civilising guidance. In an article in *Ultramar*, an unofficial colonial propaganda monthly magazine, the need for mass migration to the colonies was justified by the fact that even Africans who had already been civilised could relapse into their former stage of savageness, leaving all the riches untapped, without Europeans' influence.<sup>76</sup> In this sense, massive white settlement was presented as necessary not only to develop colonial economies but also to establish an enduring civilisation.

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<sup>72</sup> Ramos, Jorge (1935), 'Africa Nostrum, África Desconhecida' in *O Mundo Português*, 14 (February 1935), p. 53.

<sup>73</sup> See, for instance, São Tomé's writer João Viana de Almeida on Angola in *Vida Colonial*, 2<sup>nd</sup> May 1935 and an unsigned in *O Império Português*, 14th May 1931, p. 3.

<sup>74</sup> 'O território nacional pode satisfazer largamente as necessidades vitais de todo o povo português. (...) E escusado será afirmar que só se poderão conseguir todos estes fins, através do Império Colonial da Nação. Para ele, pois, deve decididamente lançar os olhos o povo de Portugal. Nele deve ser posta toda a nossa esperança.' *O Primeiro de Janeiro*, 30th June 1934, p. 1. Gama Ochoa was one of the prominent military of 1926 coup d'État that established the dictatorship, even though he belonged to Mendes Cabeçadas's faction, which lost influence as Salazar consolidated his power.

<sup>75</sup> Santos, Álvaro Afonso (1945), *Breves Conceitos para um ideário de colonização portuguesa*, Lisbon, Sociedade de Geografia de Lisboa, p. 16.

<sup>76</sup> *Ultramar*, n. 1 (February 1941), p. 3.

Either by emphasising the effectiveness of settlement as a defensive measure against foreign jealousies or by stressing Africa's economic potential, pleas for migration to the colonies proliferated in the Portuguese press during the 1930s and 1940s. However, these appeals were not limited to defensive and economic arguments. The spiritual allure of the Empire, which appeared in the aforementioned Galvão's novel and Quintinha's novella as the source of regeneration of the main characters, was cultivated. This idea was supported and promoted by prominent members of *Estado Novo's* political elite and its propaganda media, especially after Armindo Monteiro was nominated minister of Colonies in 1931, giving rise to the imperial mystique rhetoric. For instance, during the opening session of the First Colonial Governors Conference held in Lisbon in 1933, Monteiro declared that 'the true Portuguese essence lies in the colonies', urging that the Portuguese to change their attitudes towards the empire:

Slowly but steadily, we have to drive our life to the colonies. They can give us everything – from the collective pride, which is what makes a People great, to the certainty of employment, the glory of the realisations, wealth, well-being, and strength. (...) *Estado Novo* must act in accordance with the colonial spirit [of the nation] to give continuity to History as we know it.<sup>77</sup>

Also António de Oliveira Salazar considered the colonies as 'the greatest schools of Portuguese nationalism' during an interview for widespread *Diário de Notícias*. Although Salazar himself never visited any of the Portuguese colonies during his thirty-six years at the helm of Portugal and its empire (nor did he visit them before reaching power), he claimed that coming into direct contact with the colonies was a tonic to patriotism:

The major part of the Army officers, [and] all of those in which it is necessary to keep alive the cult of the Patria and the pride of the Race should experience the colonies. (...) If we want to be a great colonial country, [and] if we want to

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<sup>77</sup> 'No Ultramar está o verdadeiro ideal português. (...) Para as Colónias temos de dirigir, devagar, mas persistentemente, a nossa vida. Elas podem-nos dar tudo – desde o orgulho colectivo que faz grandes os povos, até à certeza do trabalho, à glória das realizações, à riqueza, ao bem-estar, à força. (...) O *Estado Novo* tem de obedecer ao espírito colonial para continuar a história que vimos.' Monteiro, Armindo (1933), 'Directrizes de uma política ultramarina' in *I Conferência dos Governadores Coloniais*, Lisbon, Agência Geral das Colónias, pp. 29-30.

see Angola as a Greater Portugal, we have to change both processes and mentalities, [and] we must go to our colonies as someone who is not leaving his homeland, as someone who is not going abroad.<sup>78</sup>

Even though neither Salazar nor Monteiro conceived the nation as an artificial construction, their discourse brings to mind Walker Connor's formulation on the essence of the nation as an intangible psychological bond, being 'a matter of attitude rather than fact'.<sup>79</sup> The colonies were perceived as the *locus* for national regeneration at a spiritual level. By contacting directly with the land discovered by the navigators in the fifteenth and sixteenth centuries, one could not only perceive the true geographical dimension of the nation but also reinforce the pride of belonging to a lineage of empire-builders. In the empire, modern Portuguese could feel closer to their adventurous ancestors, imagining themselves connected with them in some mythical way. Whilst metropolitan Portugal was characterised by degradation and decadence caused by the penetration of foreign ideas that had been responsible for abandoning or neglecting the imperial mission, colonial space was associated with purity and truth regarding national ideals in both Salazar's and Monteiro's aforementioned interventions. These territories resembled frozen in better times for Portugal.

In *Estado Novo's* nationalist rhetoric, a greater future could be achieved through a reversal of the conditions that have been responsible for degrading the nation. Driving Portugal's life to the overseas, following the example of the Portuguese in the Discoveries Age, was the key of regeneration. In this sense, the trope of making a new Portugal in Africa went beyond the establishment of new Portuguese communities in Africa, creating idealised 'little Portugals' in the colonies until they were completely 'portugalised'. Making a new Portugal in Africa entails a double meaning, embracing

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<sup>78</sup> 'As nossas colónias deveriam ser as grandes escolas do nacionalismo português. Por elas deveriam passar, obrigatoriamente, a maioria dos oficiais do Exército, todos aqueles em que é preciso manter aceso o culto da Pátria e o orgulho da Raça. (...) Se queremos ser um grande país colonial, se queremos olhar Angola como um Portugal Maior, temos de mudar de processos, de mentalidade, temos de ir para as nossas colónias como quem não sai da sua terra, como quem não vai para o estrangeiro'. António Ferro's interviews to Salazar first appeared in *Diário de Notícias* in December 1932. *Entrevistas de António Ferro a Salazar*, Lisbon, Parceria A.M. Pereira, p. 84.

<sup>79</sup> Connor, Walker (1994), *Ethnonationalism: The Quest for Understanding*, Princeton, Princeton University Press, p. 43.

also the idea that the regeneration of Portugal as a whole – in economical, geopolitical, and even spiritual terms – was played in the colonies.

The success of propaganda of this kind in arousing the desire to migrate and settle in the colonies is difficult to assess. Cláudia Castelo argued that, in the long run, the ‘imperial mystique’ promoted by official institutions did influence individuals’ decision to move to the colonies. Without overriding the importance of economic causes and prospects of social mobility as the main motivations or a combination of diverse causes, Castelo mentioned a few examples of the penetration of ideology in common people’s minds.<sup>80</sup> In a letter to the minister of Colonies in 1946, a prospective settler justified his intention by declaring that ‘my mission as a Portuguese is not confined to the skimpy borders of the old and glorious mother-homeland. My destiny – our destiny – is in the overseas provinces’.<sup>81</sup> Requests presented in 1933 did not echo the official phrasing in this way,<sup>82</sup> which might suggest that official propaganda had yet to get its message at the time. However, one cannot tell for sure if the author of the said 1946 letter had actually been indoctrinated by official propaganda or was just reproducing the official propaganda discourse as a strategy to obtain the minister of Colonies’ authorisation to settle in the colonies, getting one of the government’s paid voyages.

A less ambiguous example mentioned by Castelo refers to memoir of a former settler published in the 1990s. The author claimed that reading a Marcelo Caetano’s article in *O Mundo Português*, the colonial propaganda agency’s magazine for youngsters, had motivated his decision to pursue a career in colonial civil service.<sup>83</sup> The charms of Caetano’s article are not difficult to understand. The text appeared as an open letter addressed to a non-specified António, one of the most common male names in

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<sup>80</sup> Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., p. 198; pp. 202-209.

<sup>81</sup> ‘A minha missão de português não se confina aqui nas acanhadas fronteiras da velha e gloriosa Mãe-Pátria. O meu destino, o nosso destino, está nas Províncias do Ultramar.’ Letter from prospective settler to the Minister of Colonies, 13<sup>th</sup> May 1946, quoted in Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., p. 198, footnote 13.

<sup>82</sup> See ‘Colonos: pedidos de embarque - 1933’, AHU, Ministério do Ultramar, Direcção Geral das Colónias do Oriente, 1E, nº 564, folder 1.

<sup>83</sup> Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., p. 206.

Portugal at the time, and was written in a punctilious but informal style to which the young reader could relate. The article is intended to show that no other place was more suitable for a vigorous young man ‘with physical, intellectual, and moral virtues’ who intended to ‘contribute to the construction of a greater and better Portugal’ than the empire.<sup>84</sup> Besides demystifying the idea that Africa was a land of fevers and disarray, Caetano tried to convince the reader that he could really make a difference to the future of Portugal and the Christian world by choosing a colonial career. The nation was in need of ‘real men’ – i.e. men who were not afraid of action and did not turn their back to difficulties, as certainly most youngsters reading *O Mundo Português* aspired to be – to ‘instil and transplant’ the Portuguese spirit to the overseas provinces, bringing civilisation to remote places and peoples in Africa.<sup>85</sup> At a time the aggrandisement of Portugal was no longer played in the battlefields, these men were the new builders and guardians of the Empire, continuing Portugal’s historic mission.<sup>86</sup>

The intersection between *Estado Novo*’s rhetoric and action was complex, though. There was a clear discrepancy between the appeals to drive life to the colonies and experience the colonies first hand and the reality of the policies regarding migration to the colonies and settlement. On the one hand, the Portuguese government did not conduct any project of European settlement in any of the Portuguese colonies in the 1930s and 1940s. The first official project of colonisation established during *Estado Novo* – the Cela Settlement in Amboím highlands, in Angola – was conceived in late 1950 to counter decolonising influences and did not receive its first settlers before 1953. Previously, Francisco Vieira Machado, minister of Colonies from 1936 and 1944, outlined a wide project of European settlement in Angola in 1939.<sup>87</sup> His draft-law was submitted to the Corporative Chamber and the Superior Council of the Empire, being

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<sup>84</sup> Caetano, Marcelo (1934), ‘Carta a um jovem português sobre o serviço do Império’, *O Mundo Português*, 7/8 (July/August 1938), p. 261.

<sup>85</sup> Idem, p. 264.

<sup>86</sup> Idem, p. 265.

<sup>87</sup> Vieira Machado, Francisco (1940), ‘Acção Colonizadora do Estado’ in *Colonização. Projectos de Decretos*, Lisbon, Agência Geral das Colónias

generally applauded in its intentions.<sup>88</sup> Nevertheless, the limits of state intervention were debated: during the discussions in both consultative institutions some members voiced their criticism against a model of settlement entirely based upon adoption of state-directed policies or against other ‘excesses’ in the proposed model (excess in the selection of settlers, excess in the support given to the settlers, and, most of all, excess in expenditure). At the end, Vieira Machado’s project was never promulgated.

On the other hand, the Portuguese government did not grant wide institutional support to private initiative project of European settlement in any of the Portuguese colonies either. The lack of governmental support hindered the development of communities of European settlers in Portuguese Africa. Although some more or less spontaneous settlements materialised in Angola,<sup>89</sup> other private initiative attempts were doomed to failure from the very start due to the lack of initial capital. In spite of some creative efforts to circumvent the problem,<sup>90</sup> the only significant settlement project put into practise in this period was directed by a big capital corporation: the Benguela Railway Company. With the endorsement of the Portuguese government, the Benguela Railway Company took responsibility for establishing agricultural settlements along its rail line in the Angolan Central Highlands. The terms of the project, which was arranged in 1935, were extremely positive for the Portuguese government.<sup>91</sup> The government compromised to make the future agricultural parcels around the railway

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<sup>88</sup> For the Corporative Chamber’s report, see ‘Parecer da Câmara Corporativa sobre o projecto de decreto relativo à colonização de Angola (1939)’, AHP, Secção XXVIII, cx. 16, nº 1 and cx. 16A nº 10. For the Superior Council of Empire’s one, see ‘Conselho do Império – Parecer nº 40, Colonização Europeia – Processo de consulta nº37’, 25<sup>th</sup> November 1940’, *Boletim Geral das Colónias*, 199 (January 1942), pp. 13-112. See also AHU, MU, Conselho Superior Colonial - Conselho do Império Colonial (CSC\_CIC), 1C, n. 1467-0.

<sup>89</sup> Such as Hoque settlement, in Huíla highlands, and São Jorge of Catofe settlement, in Amboím highlands; both in the late 1940s. See Ribeiro, Orlando (1981), *A Colonização de Angola e o seu Fracasso*, Lisbon, Imprensa Nacional – Casa da Moeda and Feio, Mariano (1998), *As causas do fracasso da colonização agrícola de Angola*, Lisbon, Instituto de Investigação Científica Tropical.

<sup>90</sup> For instance, in 1932, a group entitled *Vitália – Society for the Promotion of Colonisation and Progress in Portuguese Africa* tried to raise the necessary funds through an appeal to public subscription and private contribution. Marques, Gilberto (1932), *Africa. Portugal Futuro!*, Lisbon, Edições do Jornal África.

<sup>91</sup> Decree 25.027, *Diário do Governo*, 9<sup>th</sup> February 1935. See also Bender, Gerald (1973), ‘Planned rural settlements in Angola: 1900-1968’, in Franz-Wilhelm Heimer (Ed.), *Social Change in Angola*, München, Weltforum Verlag, pp. 235-279.

available to the Benguela Railway Company, as well as to pay for settlers' passages from the metropole to Angola. In turn, the Benguela Railway Company was entirely responsible for all the organisation of the settlement and necessary assistance, from assuring the transport and accommodation of the settlers since the moment they unshipped in the colony to providing medical care, education, technical support for agricultural, etc. In this way, the responsibility and investment of official institutions in the Benguela railways Company' settlement project was insignificant.

Moreover, the Portuguese government did not facilitate free or spontaneous settlement (the so-called *colonização livre*) until the aftermath of the Second World War. On the contrary, it precluded it in two ways. First, control over migration to the Portuguese colonies was centralised, becoming tighter. Obstacles created by the Ministry of Colonies prevented the colonies to become an alternative for potential Portuguese migrants barred in Brazil or the USA. After the Second World War, even though the control over migration to the colonies persisted, authorities initiate efforts to direct migration flows to Africa. In March 1947, migration abroad was suspended for the sake of 'protection of emigrants, the economic interests of the country and the development of the overseas territories through the increase of white population'.<sup>92</sup> Shortly after, reports that the Ministry of Colonies had sent 600 settlers to Angola and Mozambique appeared in the press.<sup>93</sup> At a press conference in early 1949, Minister of Colonies Teófilo Duarte informed that his ministry had funded passages for 4.500 settlers (3000 to Mozambique and 1500 to Angola) in the previous year and a half, assuring that this policy was to be continued.<sup>94</sup>

Second, the Portuguese government also limited migration to the colonies indirectly since new economic policies introduced by the Colonial Act in 1930 did not create pull factors to attract metropolitan people to the colonies. Although the promulgation of Colonial Act came with promises of creation of a credit for colonial

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<sup>92</sup> Decree 36.199, *Diário do Governo*, 29<sup>th</sup> March 1947, p. 243. Seven months later it was created the Board for Emigration (*Junta da Emigração*) with these objectives in mind. Decree 36.558, *Diário do Governo*, 28<sup>th</sup> October 1947. On the *Junta da Emigração*, see Galvanese, Marina (2013), *A Junta da Emigração: Os discursos sobre a emigração e os emigrantes no Estado Novo do Pós-Guerra (1947-1970)*, Coimbra, Universidade de Coimbra (Unpublished dissertation).

<sup>93</sup> According to the article, in May. *Acção*, 26<sup>th</sup> June 1947, p. 3

<sup>94</sup> *Alma Nacional*, 100-101 (January - February 1949), p. 19.

economies development, the important public works and the ‘expansion of our race’ through settlement,<sup>95</sup> the new policies actually precluded economic development in Portuguese Africa. Colonial development funds for the two key colonies in Africa were created only in the late 1930s. However, they mainly focused on betterments that would facilitate economic exploitation rather than European settlement. They were very limited, as the colonies could not count with financial assistance from the metropole. The Development Fund for Mozambique, created in 1937 to be carried out until 1942, was entirely subsidised by the colony itself.<sup>96</sup> In turn, half of the projected costs anticipated by the Development Fund for Angola, created in 1938, relied on a loan in the metropolitan *Caixa Geral de Depósitos* (i.e. the public sector bank) to be repaid by the colony;<sup>97</sup> the fund amounted to little more than two-thirds of the sum considered necessary by the General Governor.<sup>98</sup> Only in 1953, with the establishment of first national wide six-year Plan for Development (*Plano de Fomento*, covering both the metropole and the empire), state capital spending increased significantly, facilitating not only economic growth but also European settlement.<sup>99</sup>

The reason why Portugal – albeit feeling its empire threatened – did not join the other European colonial powers in encouraging migration to the colonies during the interwar period was mainly a financial one. Salazar had persevered with austerity measures as the only acceptable solution for the economic crisis since he first took

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<sup>95</sup> ‘Era indispensável fâze-lo [a publicação do Acto Colonial] quando vai ser estabelecido o crédito de fomento da economia ultramarina, quando se decreta um regime de moderação para as suas dívidas do império à metropole, quando se preparam obras públicas importantes na África Portuguesa e quando se tenciona promover nelas a colonização propriamente dita, com expansão da nossa raça’. See the preamble of Colonial Act, Decree 18.570, *Diário do Governo*, 8<sup>th</sup> July 1930, p. 1309.

<sup>96</sup> Decree 27.537, *Diário do Governo*, 25<sup>th</sup> February 1937.

<sup>97</sup> Decree 28.924, *Diário do Governo*, 16<sup>th</sup> August 1938.

<sup>98</sup> A copy of the Angola’s governor’s proposal, as well as the reports of the Council of the Colonial Empire and the Cooperative Chamber, can be found at INATT, Secretaria-Geral da Presidência do Conselho de Ministros, Gabinete do Presidente, cx. 5, proc. 159/3, nº 1 – Fundo de Fomento e Plano de Fomento de Angola.

<sup>99</sup> On the Plans for Development in the 1950s, 1960s and 1970s and their impact on Angola and Mozambique, see Pereira, Victor (2013), ‘A Economia do Império e os Planos de Fomento’ in Jerónimo, Miguel Bandeira (ed.), *O Império Colonial em Questão (Sécs. XIX-XX): Poderes, Saberes e Instituições*, Lisbon, Edições 70, pp. 251-285.

office at the Ministry of Finances in 1928, disregarding criticism that these policies were impoverishing the colonies. Necessary infrastructures to prepare the colonies for welcoming metropolitan citizens and the required further assistance to this newly established population were expensive. Besides land settlement schemes, assisted passages from the metropole, building settlers' homes or granting installation allowances, it was necessary to make the tropics suitable for Europeans. Complementary public works, such as transportation and communication infrastructures, hospitals or other facilities for medical assistance, schools or dams to enable agriculture, required a substantial investment that was not compatible with Salazar's policies of fiscal restraint. By relying on private initiatives such as the 1935 Benguela Railway Company' settlement scheme – which nevertheless required official approval –, budget balance imposed by the Colonial Act was not compromised.

The lack of official commitment to accelerate European settlement in Africa before the late 1940s was justified on the grounds of caution. It was repeatedly reminded that Portugal was not a rich country and, therefore, could not spend money on projects without being certain they would succeed.<sup>100</sup> From the government's perspective, it was necessary to break with the tradition of improvisation that had been on the basis of previous Portuguese settlement experiences. Modern colonisation required a systematic extensive study of the territories for the sake of better planning to avoid repeating the same old mistakes. In other words, it required a more scientific approach to colonisation rather than an empiricist one.

To be sure, even recent settlement projects that had been backed by scientific studies had turned out a failure. Recent experiences in Angolan highlands were the case in point. Shortly after taking office as colonial governor in 1907, Paiva Couceiro appointed a technical commission for the study of the Benguela plateau and its opportunities for European settlement.<sup>101</sup> The findings of this commission, which was

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<sup>100</sup> See, for instance, Armindo Monteiro's inaugural speeches at the Colonial Governors Conference, in 1933, or at the Colonial Exhibition in 1934. Monteiro, Armindo (1934), 'Directrizes de uma política ultramarina' in *I Conferência dos Governadores Coloniais*, Lisbon, Agência Geral das Colónias, and Monteiro, Armindo (1934), 'Inimigos da colonização', *Mundo Português*, 5 (May 1934), pp. 353-361.

<sup>101</sup> Governo Geral da Província de Angola (1908), *Breve Notícia sobre o Planalto Colonizável de Benguela*, Luanda, Imprensa Nacional. The final report was published in 1910: Nascimento,

coordinated by physician and naturalist José Pereira do Nascimento, were at the basis of Paiva Couceiro's 1909 and Norton de Matos's 1912 settlement scheme (being the latter continued during Norton de Matos's second term in the 1920s). From the first moment, the Portuguese community in Angola discredited José Pereira do Nascimento's study, criticising the author's limited knowledge of the area; Alfredo de Andrade, a geographer and agronomist that had also took part in the commission, was amongst the most vocal critics.<sup>102</sup> By the late 1930s, a report for the National Company for Development proved Alfredo de Andrade's initial concerns were right: in spite of the fact that the climate was fit for Europeans, the chosen locations were short in water and/or had soils that were too poor for agriculture.<sup>103</sup> Therefore, mistakes of the past gave strength to the official position in the face of the many advocates for the immediate occupation of the 'colonisable zones'.

What is remarkable here is that, notwithstanding claiming to be unable to sponsor settlement schemes itself, the Portuguese government devoted much energy in preventing others to take advantage of this official inertia. As it was exactly pointed out in an article in *Acção*, the political meaning of creating new societies where (in the contemporary vision) they did not exist or only existed in 'primitive' forms was much different from passively allowing that these new societies were created by others or spontaneously.<sup>104</sup> The government did not abdicate its privileged role in the organisation and discipline of European settlement in Portuguese Africa. Introducing tighter rules for the approval of the potential settler and blocking private initiatives for the establishment of new settlements were predicated on underlying assumptions about who was

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José Pereira et al. (1910), *Relatório da missão de colonização do planalto de Benguela em 1909*, Luanda, Imprensa Nacional. See also Nascimento, José Pereira (1912), *A Colonização do Planalto de Benguela*, Lisboa, J. Rodrigues & C<sup>a</sup>.

<sup>102</sup> See Neto, Maria da Conceição (2012), *In Town and Out of Town: A Social History of Huambo (Angola), 1902-1961*, London, SOAS-University of London (Unpublished dissertation), p. 122 (footnote 97) and pp. 124-125.

<sup>103</sup> See 'Relatório para a Companhia de Fomento Nacional, escrito após viagem de estudo a Angola em 1939 por Alberto Cardoso Martins e Menezes Macedo' INATT, AOS, CO, UL, 8B, Pt 20, ff. 682 and ss. See also Galvão, Henrique (1940), 'Zonas colonizáveis de Angola e soluções aconselháveis para intensificar a sua colonização', *Congressos do Mundo Português, XV Volume, Memórias e comunicações apresentadas ao Congresso Colonial (IX Congresso)*, 2<sup>nd</sup> Tome, II Section, Lisbon, Comissão Executiva dos Centenários, pp. 292-297.

<sup>104</sup> *Acção*, 26<sup>th</sup> June 1947, p. 3.

appropriate and desirable – or not – for life in the colonies and how the ‘new Portugal’ in Africa should be created. As such, creating obstacles to hinder European settlement in the African colonies did not denote indifference but rather entailed an intensification of the control over colonial space and people in white Portuguese nuclei in the tropics. It was part of a process of forcing an idealised representation of a ‘new Portugal’ in Africa – the only ‘correct’ representation there could be – into reality.

#### 4.2.1. Space: Progress and Ruralism

On 4<sup>th</sup> November 1944 the President of Republic, General Óscar Carmona, inaugurated a small exhibition organised by the Directorate-General for Colonial Development. The Exhibition of Colonial Buildings (or Exhibition of Buildings in the Colonies, as it was also called) was held in the most important school of engineering in the country, the *Instituto Superior Técnico*, in Lisbon. It was intended to show ‘*Estado Novo*’s detractors’ that financial policies for the colonies inscribed in the Colonial Act had bore fruit.<sup>105</sup> In the words of the reporter of *Alma Nacional*, who was visible enraptured with what he saw, the transformation of the Portuguese colonies did not happen miraculously or suddenly but rather ‘methodically and solidly’: without going into debt, ‘everything which is necessary to make the *Portuguese World* into a new world, where the sad ruins of a past of disorganisation give way to modern structures’ had been made under the orientation of Salazar’s regime.<sup>106</sup>

Visitors were invited to imagine Portuguese colonial societies as modern at the sight of miniaturised versions of an array of innovative constructions recently

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<sup>105</sup> As Marcello Caetano, minister of Colonies at the time, stressed in the catalogue of the exhibition. Quoted in *Boletim Geral das Colónias*, 233 (November 1944), p. 10.

<sup>106</sup> ‘(...) em suma, tudo quanto se torna preciso fazer do *Mundo Português* num mundo novo, onde as tristes ruínas de um passado de desorganização cedam o lugar a edificações moderna.’ *Alma Nacional*, 50 (November 1944), pp. 12-13. Emphasis in the original.

completed, in progress or in most cases only projected for the colonies. Arranged over eight rooms, scale models of ports, bridges, rail stations, aerodromes, high schools and professional schools, churches, hospitals and maternities, urbanisation plans with wide streets and squares and orderly residential neighbourhoods were complemented with some explanatory charts, maps, and pictures that stressed the economic and technological advance in the previous decade. These hallmarks of progress and civilisation showed that Portugal did not lag behind other colonial powers in developing its colonies and preparing them to attract and accommodate Europeans.<sup>107</sup> For instance, *Liceu Salazar* in now Maputo, of which a scale model was exhibited in *Instituto Superior Técnico*'s halls, was the largest high school in the entire African continent at the time of its inauguration in October 1952. It was also the first of its kind in Portugal, providing an educational experience different from any school in the old metropole.

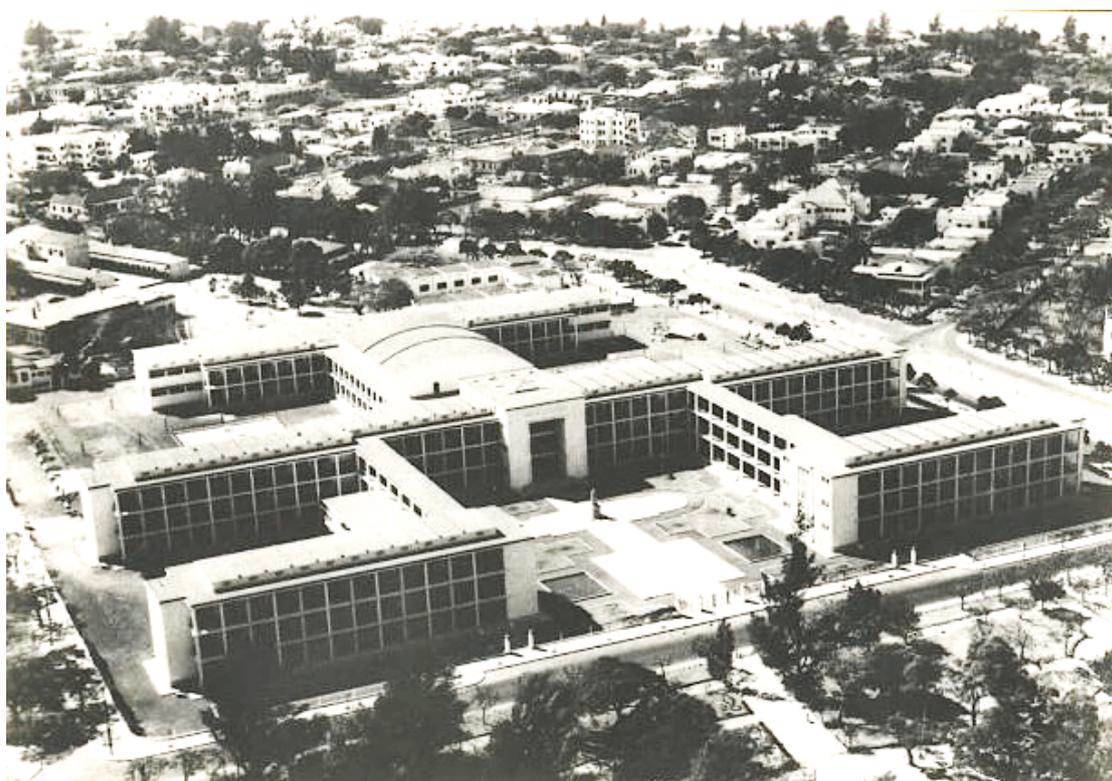


Figure 4.3. View of *Liceu Salazar* in an undated postcard issued by the colonial propaganda

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<sup>107</sup> With the exception of the Luanda's indigenous maternity, the scale models in exhibition were mainly for settlers.

agency, *Agência Geral do Ultramar*. (Private collection)

*Liceu Salazar*'s interior was no less impressive than its imposing outside. Built in accordance with novel ergonomic principles, it put emphasis on efficiency and optimal comfort, included facilities such as an Olympic swimming pool, more than one gym, changing rooms with marble, workshops with modern tools and machinery, innovative systems of air conditioning and water filtration, a huge library and many rooms for study, as well as for leisure, a theatre, a cinema projection room and 'everything modern that can be found'.<sup>108</sup> It was not until the late 1940s that ergonomics emerged as an independent scientific discipline and its application beyond the military and industrial field was still experimental by the time *Liceu Salazar* was constructed. Indeed, the trope of colonies as laboratories of modernity was first introduced by scholars focusing on urban design and discourses and its impact on power relations amongst social groups.<sup>109</sup> In line with Michel Foucault's theorisation of modernity, colonialism has been interpreted as a process of exporting modern forms of Western discipline to the colonised world, being the creation or reform of colonial urban spaces a cornerstone of social engineering for power affirmation. As Gwendolyn Wright noted, urban design 'assumed a major role in efforts to make colonialism more popular among Europeans and more tolerable to the colonized peoples.'<sup>110</sup> Her observation regarding the French colonial cities was also pertinent for Portugal's case.<sup>111</sup>

The realisation of the Exhibition of Colonial Buildings in November 1944 shows that the Portuguese government was aware of the importance of spreading an attractive

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<sup>108</sup> 'Moçambique: Liceu de Salazar em Lourenço Marques', *Boletim Geral do Ultramar*, 328 (October 1952), p. 150.

<sup>109</sup> Rabinow, Paul (1989), *French modern: norms and forms of the social environment*, Chicago, Chicago University Press; Wright, Gwendolyn (1991), *The Politics of Design in French Colonial Urbanism*, Chicago, University of Chicago Press.

<sup>110</sup> Wright, Gwendolyn (1997), 'Tradition in the Service of Modernity in French Colonial Cities, 1900-1930.' Frederick Cooper and Ann Laura Stoler (eds.), *Tensions of Empire: Colonial Cultures in a Bourgeois World*, Berkeley, University of California Press, ch. 9, p. 322.

<sup>111</sup> Domingos, Nuno and Elsa Peralta (2013), 'A cidade e o colonial' in Idem (eds.), *Cidade e Império. Dinâmicas coloniais e reconfigurações pós-coloniais*, Lisbon, Edições 70, pp. ix-l.

image of the colonies amongst people in the metropole and creating betterments for the benefit of populations in the colonies. By the same token, an Office for Colonial Urbanisation (Gabinete de Urbanização Colonial) was created a month after the exhibition.<sup>112</sup> Reporting directly to the ministry of Colonies, it was intended to avoid ‘creating old defects in new lands’ – as the minister put it – and give Portuguese Africa the most comfortable and beautiful cities.<sup>113</sup> On the eve of the end of the Second World War, Portugal was a latecomer in colonial urban design, trying to recover the lost time.<sup>114</sup> This delay cannot be detached from *Estado Novo*’s ideological conceptions. In truth, although the international wave decolonisation propelled the investment in the creation of cosmopolitan, avant-garde colonial cities, the idealised ‘new Portugal’ in Africa under the *Estado Novo* was not an urban one – for that matter, the idealised ‘new Portugal’ in the metropole was not an urban one either.

As Ernest Gellner wrote, ‘nationalism usually conquers in the name of a putative folk culture. Its symbolism is drawn from the healthy, pristine, vigorous life of the peasants.’<sup>115</sup> Portuguese nationalist regime of *Estado Novo* was no different. During the dictatorship, rurality was eulogised as the purest Portuguese way of living.<sup>116</sup> Closer to nature and national traditions, rural life was associated with a set of virtues (humbleness, tirelessness, modesty, and quietness can be added to Gellner’s

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<sup>112</sup> Decree 34.173, *Diário do Governo*, 6th December 1944.

<sup>113</sup> ‘Palavras do Senhor Ministro das Colónias’, *O Mundo Português*, 133 (January 1945), pp. 3-4.

<sup>114</sup> On urbanism in the late Portuguese empire, see Fernandes, José Manuel (1998), ‘Arquitectura e Urbanismo no espaço ultramarino português’ in Francisco Bethencourt and Kirti Chaudhuri (1998)(eds) *História a Expansão Portuguesa*, Lisbon, Círculo de Leitores: vol. 5, pp. 334-383 and Milheiros, Ana Vaz (2012), *Nos Trópicos Sem Le Corbusier. Arquitectura Lusó-Africana no Estado Novo*, Lisbon, Relógio de Água.

<sup>115</sup> Gellner, Ernest (1983), *Nations and Nationalism*, Oxford, Basil Blackwell, p. 59

<sup>116</sup> On *Estado Novo*’s bucolic ideals and the cult of rurality, see Melo, Daniel (2001), *Salazarismo e Cultura Popular (1933-1958)*, Lisbon, Imprensa de Ciências Sociais, esp. ch.1. See also Brito, Joaquim Pais de (1982), ‘O Estado Novo e a Aldeia mais Portuguesa de Portugal’, AAVV, *O Fascismo em Portugal: Actas do Colóquio Realizado na Faculdade de Letras em Março de 1980*, Lisboa, A Regra do Jogo, pp. 511-532; Leal, João (2000), ‘Um lugar ameno no campo: A Casa Portuguesa’ in Idem, *Etnografias Portuguesas (1870-1970): Cultura Popular e Identidade Nacional*, Lisbon, Publicações D. Quixote, pp. 107-144; Alves, Vera (2007), ‘«A poesia dos simples»: arte popular e nação no Estado Novo’, *Etnográfica*, 11 (1), pp. 63-89; Alves, Vera (2010), ‘O Povo do Estado Novo’ in José Neves (ed.), *Como se Faz um Povo*, Lisbon, Tinta da China, pp. 183-194.

aforementioned ones) that were frequently cherished in official propaganda. Urbanisation was perceived as a cause of disruption of national traditions, bringing dire consequences for society. For Salazar, a countryside man himself, total misery – in the sense of poverty and mental affliction alike – was a ‘secretion from progress’, rarely being experienced in traditional peasant societies where ‘the field is a set table’ and ‘natural solidarity’ between community members protected the most disadvantaged. In the cities, ambition had distanced men from nature and from each other.<sup>117</sup> In accordance with this anti-urban discourse, reproducing metropolitan rural spaces in the empire appeared as a transplantation of the best part of Portugal – i.e. the part still not contaminated by modern values – to the colonies; moreover, while traditional values were more and more threat in the metropole due to the advances of modernisation, rural settlements in the colonies could induce a new dynamism to pure Portugueseeness itself. One can recall the characters of Henrique Galvão’s novel mentioned in the opening of this chapter, Rodrigo and Vasco, and their psychological transformation as an example of how this idea of regeneration of national virtues through agricultural work in the empire was engrained.

Therefore, the first state settlement scheme with metropolitan people established during the *Estado Novo* was an epitome of traditional Portuguese rural life, being planned down to the detail in the metropole. Conceived in late November 1950, the agricultural European settlement in Cela in Angola was the brainchild of agronomist-engineer Ilídio Barbosa, who idealised 40 villages or hamlets for European settlers only.<sup>118</sup> In reality, less than half of these villages were constructed and never reached the number of settlers dreamt by Ilídio Barbosa but it remained a model settlement, inspiring future experiments. The settlement, which was agglomerated around a small town enlighteningly named Santa Comba Dão as the place where Salazar was born, was

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<sup>117</sup> Salazar in an interview conducted in 1938, compiled in *Entrevistas de António Ferro a Salazar*, Lisbon, Parceria A.M. Pereira, pp. 172.

<sup>118</sup> See Barbosa, Ilídio (1952), ‘O planalto de Amboím, zona de colonização’ in *Agronomia Angolana*, 6 (76), pp. 5-76. See Bender, Gerald (1978), *Angola under the Portuguese. The Myth and the reality*, Berkeley – Los Angeles, University of California Press, pp. 104-105. Ribeiro, Orlando (1981), *A Colonização de Angola e o seu Fracasso*, Lisbon, Imprensa Nacional – Casa da Moeda, pp. 182-188; Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, Oporto, Edições Afrontamento, pp. 143-153

intended to be a reproduction of the metropolitan rural space rather than a mere agglomeration of Portuguese farmers in an African rural space, constructing peasant communities as similarly as possible to the metropolitan ones. Consequently, houses assigned to each family of settlers upon arrival resembled rural metropolitan habitations. Settlers were provided a farm of small dimensions upon their arrival. Family members themselves were responsible for cultivating as in the metropole, not being allowed to use any African labour. They received seeds and animals, as well as farm implements. The latter were rudimentary: in accordance with the desired system of small-scale familiar farms instead of agricultural exploitations oriented for maximisation of profit, plough cattle and bullock carts were provided instead of modern tractors. Orlando Ribeiro noted that quickly the prohibition of using African labour was violated and modernising measures were taken by the settlers' initiative.<sup>119</sup> Nevertheless, pictures displaying bucolic images of settlers' lives in Cela settlement – apparently frozen in a 'better' time – were promoted by official propaganda as late as 1961.



Figure 4.4. View of a bullock cart passing in front of Cela Settlement's church. The building,

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<sup>119</sup> Ribeiro, Orlando (1981), *A Colonização de Angola e o seu Fracasso*, op. cit., p. 183.

which seems to have been dislocated directly from Alentejo, also functioned as a school.

Source: Afonso, A. Martins (1961), 'O colonato europeu de Cela, em Angola', *Boletim Geral do Ultramar*, 427-428 (January-February 1961), p. 275

In reality, the model adopted in Cela did not differ from previous settlement experiments much criticised in the 1930s and 1940s. Although the agricultural basis of the ideal Portuguese settlement in Africa was taken for granted, the establishment of small-scale family farms or larger farms explored using African labourers had been a vexed question. In fact, the prohibition of using African labour was the source of one of the main criticisms in the aforementioned Vieira Machado's project in 1939, motivating the Corporative Chamber to draft an alternative proposal. In the view of the Corporative Chamber (which was not followed by all its members, though), a settler would not become attached to his land in Africa unless he could not only feed his family but also have revenue that enhanced his social mobility.

Backed by the Benguela Railway Company's reports, the chamber concluded that profitability was not possible along the lines proposed by the minister: the workforce of a settler family alone was not enough, especially considering that the soils in the locations suitable for Europeans were not the most fecund and crops required much effort.<sup>120</sup> The Superior Council of the Empire also supported this view, electing the Corporative Chamber's alternative proposal over the minister's draft. In addition to the argument of profitability, the Superior Council of the Empire argued that creating a settlement for Europeans only and forbidding the use of African labour was opposed to the Portuguese colonising tradition since it introduced racial segregation. By working in the farms of European settlers – or, as it was put in Superior Council of the Empire's report, by 'collaborating' with European settlers –, Africans were submitted to the beneficial and nationalising influence of the coloniser and civilised through work.<sup>121</sup>

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<sup>120</sup> 'Parecer da Câmara Corporativa sobre o projecto de decreto relativo à colonização de Angola (1939)', AHP, Secção XXVIII, cx. 16, nº 1.

<sup>121</sup> Conselho do Império – Parecer nº 40, Colonização Europeia – Processo de consulta nº37', 25<sup>th</sup> November 1940', *Boletim Geral das Colónias*, 199 (January 1942), p. 39.

In contrast, the prohibition of using African labour was predicated on the fear that European settlers' degenerated in contact with the colonised. According to this trend of thought, European settlement schemes had to put aside the capitalist principle of profit seeking. This idea was discussed in the parliament during a debate on unemployment in 1940. For Parliament Member Joaquim Dinis da Fonseca, who was nominated Subsecretary of State of Social Assistance shortly after this intervention, unlike market economies, a subsistence economy to 'feed the ones who do not have bread' at home was feasible and convenient for the metropolitan interests.<sup>122</sup> While Dinis da Fonseca focused on the effects on the metropole, colonial intelligentsia opposed to capitalist exploitation of Africans in European settlements feared its 'dangerous political and social consequences' in the colonies.<sup>123</sup> Having easy access to cheap labour, it was argued, deviated the settler from the agricultural work (and, subsequently, from the 'healthy, pristine, vigorous' and very Portuguese way of being) and created racial tensions between the coloniser and the colonised. On the one hand, settlers would look down on agriculture as a job for inferior races, not exploiting their land by themselves and giving in to laziness.<sup>124</sup>

While an idle settler would be a bad example for the native, discrediting the established balance of power between coloniser and colonised at the eyes of Africans, a settler who worked shoulder to shoulder with Africans would have the same effect in the existing colonial order. For that reason, the use of native labour should be exclusive of plantations and large estates. Vicente Ferreira, one of the most vociferous promoters of what he called 'ethnic colonisation' (*colonização étnica*), feared that the position of the Portuguese would soon become endangered unless zones for European settlement

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<sup>122</sup> Diário das Sessões. Câmara dos Srs. Deputados, 17<sup>th</sup> February 1940, p. 307.

<sup>123</sup> See, for example, António Vicente Ferreira's explanation of vote at the Corporative Chamber, 'Parecer da Câmara Corporativa sobre o projecto de decreto relativo à colonização de Angola (1939)', AHP, Secção XXVIII, cx. 16, n<sup>o</sup> 1 and cx. 16A n<sup>o</sup> 10. (p.46)

<sup>124</sup> See, for instance, Galvão, Henrique (1936), *O Povoamento europeu nas Colónias portuguesas* (Primeira Conferência Económica do Império Português), Lisbon, Ministério das Colónias, p. 56. See also the papers presented at the First Congress on Colonisation held in Oporto as part of the First Colonial Exhibition in 1934 by Major Alberto Freire Quaresma and Lisboa de Lima: Freire Quaresma, 'A Acção do Estado na obra de colonização Branca' and Lisboa de Lima, 'A Colonização e o Povoamento nas Colónias de Angola e Moçambique', AHU, MU, AGC, 2G, 950 - Exposição Colonial Portuguesa, 1<sup>a</sup> Porto (Congressos).

and zones for exploitation were kept separate: the European settler in a scheme based on small-scale family farms did not have enough wealth or specialised skills to substantiate his distinction from the more and more civilised native.<sup>125</sup> This problem stemmed from the fact that, for Vicente Ferreira, settlement should be done primarily with poor farmers to relieve their abject poverty in the metropole:

The aim [of settlement] is not to turn the pitiful villagers of *Beiras* [in interior Portugal] into rich farmers but rather give the ones who are unhappy with their poverty (...) the possibility of settling in Africa in living conditions (...) that benefit them and their descendants, who are future citizens of Angola. (...) It is intended that the villagers and peasants from Portugal will be the villagers and peasants in Angola, even though with much better prospects for the future.<sup>126</sup>

Even though the ideal settlement in Portuguese Africa was generally imagined as a rural space, there were reservations about moving poor farmers to the colonies as defended by Vicente Ferreira. Arguably, the original economic and cultural capital of the Europeans who constitute a settlement in Africa were determinant for the protection of the divide between colonisers and colonised, making the process of selection and preparation of settlers a crucial aspect for the construction of the idealised version of the New Portugal in Africa.

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<sup>125</sup> Ferreira, Vicente (1944), *A Colonização Étnica da África Portuguesa. Estudo Apresentado ao II Congresso da União Nacional*, Lisbon, Imprensa Nacional, especially pp. 58-62.

<sup>126</sup> 'O objectivo não é transformar miseráveis aldeões das Beiras em ricos fazendeiros mas proporcionar aos descontentes com a miséria aldeã, ricos de energia e pobres de recursos, a possibilidade de se instalarem em Africa em condições de vida, as mais favoráveis para o plano de aproveitamento dessas energias, com proveito dos colonos e dos seus descendentes, futuros cidadãos de Angola. (...) Pretende-se que os aldeões e agricultores de Portugal venham ser os aldeões e agricultores em Angola, porém, com perspectivas de muito melhor futuro'. Vicente Ferreira's note sent to Angola's commercial, industrial and agricultural associations during his period as High-Commissioner and Governor-General (1926-1928), quoted in journalist António Lopes's project on Angola and Mozambique's settlement in *Diário da Manhã*, 21<sup>st</sup> November 1932, p. 11.

#### 4.2.2. People: selection and preparation of settlers

In 1930, a year before being nominated minister of Colonies, Armindo Monteiro visited Angola as a representative of the ministry of Finances in order to study the economic crisis in the colony. It was his first time in Luanda. His first impressions were of astonishment and revulsion. What shocked him the most was not the public accounts that he was auditing or the reminiscences of the revolt led by a group of independentist settlers against the colonial governor. What shocked him the most was not the rumours about foreigners prospecting the colony's mines or German, Italian, and Polish farmers hoisting their flags and speaking their languages only in Benguela region either. Although Monteiro mentioned all these concerns in a letter to Salazar, his main complaint was Luanda's people, who he described as 'bad-looking [and] bad-minded'.<sup>127</sup> Monteiro expressed horror at the sight of deportees (*degradados*) sent from Portugal, who he blamed for 'misleading the people and undisciplining the Black'.<sup>128</sup> The common settler was not spared criticism: resembling 'the barbers of Portugal's villages',<sup>129</sup> the settler did not give a good image of the Portuguese either. Deportees and provincial or illiterate settlers were blamed for the backwardness of Portuguese colonial rule in Luanda. As minister of Colonies, Armindo Monteiro tried to rectify the situation he observed in his visit.

First, the deportation to Angola from the metropole was eradicated in 1932, even though Angola continued to receive deportees of non-European provenience until 1954. In the preamble of the decree, one can read that the deportation of convicts to Angola was costly for both the metropole and the colony: while the former paid their voyages, the latter received a useless mass of population. This mass, notwithstanding the amorality of their elements, could be used as for the preparation and exploration of the

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<sup>127</sup> Letter from Armindo Monteiro to António de Oliveira Salazar, 4th August 1930, in Rosas, Fernando et al. (eds.) (1996), *Armindo Monteiro e Oliveira Salazar. Correspondência Política (1926-1955)*, Lisbon, Editorial Estampa, p. 34.

<sup>128</sup> *Idem*, p. 35.

<sup>129</sup> *Idem*, p. 32.

uncultivated metropolitan lands, whereas in Angola convicts' work 'yields little or nothing'.<sup>130</sup> What was implicit here was that, in the metropole, this workforce could be used for works that were reserved to Africans in Angola: being a forced agricultural labourer in the colonies, the European would be equated to a native.

Second, the ministry of colonies created barriers to prevent the migration of potential settlers without a guaranteed job at the destination and a warrantor responsible for paying their return to the metropole in case of difficult adaptation to the colony, as well as illiterate. Moreover, the assent of the security service agency was also required.<sup>131</sup> Armindo Monteiro repeatedly defended his reservations about diverting Portuguese migration from its typical destinations to the colonies. In his view (which guided Portuguese settlement policies even after Monteiro left the ministry, persisting until the aftermath of the Second World War), the intensification of European colonisation in Angola or Mozambique was not a solution to value the territories in the short run. On the one hand, he defended settlers without capital or qualifications who were sent to the colonies as part of wide state-sponsored white colonisation projects would become used to living on subsidies and get lazy because they would find an easy way to support themselves and their families with their work.

On the other hand, the private settler whose only capital was his ability to work could not compete with Africans, who were more adapted to the climate. The degradation caused by situations of unemployment of the settler would damage the image of the coloniser, undermining the recognition of Europeans' superiority at the eyes of the colonised and the prestige of the nation. To avoid this situation, official authorities would have to repatriate poor settlers, which was costly to Portugal's treasury.<sup>132</sup> Therefore, only the 'enemies of colonisation' could support such projects,

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<sup>130</sup> Decree 20:877, *Diário do Governo*, 13<sup>th</sup> February 1932. See also Bender, Gerald (1978), *Angola under the Portuguese. The Myth and the reality*, op. cit., ch. 3, pp. 57-94.

<sup>131</sup> Castelo, Cláudia (2007), *Passagens para África: o Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, Oporto, Edições Afrontamento, p. 91.

<sup>132</sup> According to Henrique Galvão, from 1932 to 1936, the state had funded the repatriation of about 300 poor whites from Angola. Galvão, Henrique (1940), 'Zonas colonizáveis de Angola e soluções aconselháveis para intensificar a sua colonização', *Memórias e comunicações apresentada ao Congresso Colonial*, Lisbon, Publicações do Congresso do Mundo Português, p. 311. On the problem of poor whites in the colony, see also Neto, Maria da Conceição

which were condemned to failure *a priori*.<sup>133</sup> ‘Colonisation’, as he put it, ‘is not a form of assistance’, being the selection of the colonial settler a crucial aspect.<sup>134</sup>

The settler that Portuguese Africa needed – and that the state could support – was, in Monteiro’s opinion, the administrator and qualified technician, ruling over African labourers.<sup>135</sup> Portuguese Africa was not ready to receive a surge of farmers yet. The poor farmer of the overpopulated rural areas in Northern Portugal or Madeira was particularly unfit. Instead of being a useful agent of civilisation of the colonised, he would be an obstacle and a burden to the state. During his speech at First Conference of Colonial Governors, Armindo Monteiro openly stated that ‘people who arrive without savoir-faire or capital are not necessary in Africa’. He then added: ‘we have already millions of people like that there.’<sup>136</sup> In other words, from Armindo Monteiro’s process of classification and categorisation, a European settler without capital or qualifications was not different from one of the many Africans in the colonies.<sup>137</sup>

Ann Laura Stoler has worked extensively on the pliable nature of colonial categories, drawing attention to the complex intersection between race, class, and gender in imperial contexts.<sup>138</sup> Poor whites were liminal figures, remaining in between of the divide between colonisers and colonised. Although whiteness in itself ‘accrued

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(2012), *In Town and Out of Town: A Social History of Huambo (Angola), 1902-1961*, London, SOAS-University of London (Unpublished dissertation), pp. 183-186

<sup>133</sup> Monteiro, Armindo (1934), ‘Inimigos da colonização’, *Mundo Português*, 5 (May 1934), pp. 353-361

<sup>134</sup> Monteiro, Armindo (1934), ‘Directrizes de uma política ultramarina’ in *I Conferência dos Governadores Coloniais*, Lisbon, Agência Geral das Colónias, p. 47.

<sup>135</sup> Monteiro, Armindo (1935), *Da Governação de Angola*, Lisbon, Agência Geral das Colónias, p. 42.

<sup>136</sup> ‘Gente que chegue desprovida de saber e de capital não faz falta a Africa: dessa temos lá milhões.’ Monteiro, Armindo (1934), ‘Directrizes de uma política ultramarina’ in *I Conferência dos Governadores Coloniais*, op. cit. pp. 47-48.

<sup>137</sup> See Castelo, Cláudia (2007), *Passagens para África. O Povoamento de Angola e Moçambique com Naturais da Metrópole (1920-1974)*, op. cit., pp. 287– 288

<sup>138</sup> Stoler, Ann Laura (2002), *Carnal Knowledge and Imperial Power: Race and the Intimate in Colonial Rule*, Berkeley – Los Angeles, University of California Press. Stoler, Ann Laura (1995), ‘Placing Race in the History of Sexuality’ in Idem, *Race and the Education of Desire. Foucault’s History of Sexuality and the Colonial Order of Things*, Durham – London, Duke University Press, pp. 19-54.

legislative, regulatory, and cultural substance' in colonial contexts, to use Angela Woollacott's formulation,<sup>139</sup> belonging to lower social strata weakened the whiteness or Europeaness of the settler. Ultimately, whiteness would be assured not only through skin colour but also through social status. Perhaps the most prominent example of this plasticity between categories and how a socially strong coloured person could be considered white in the Portuguese empire was Guinean Honório Pereira Barreto in the first half of the nineteenth-century. Being the son of the African Guinean mother and a Cape Verdean father who controlled the important trade of Cacheu, the official slave trading point for the Portuguese in the Upper Guinea region, he was sent to Portugal and educated in Lisbon from an early age. He was appointed super-intendent of the Cacheu fortress at the age of twenty-one and shortly after governor of Portuguese Guinea. As Richard Hammond noted he belonged to the social group them labelled as *brancos da terra* ('whites of the soil'): they claimed to be descendants of the early Portuguese settlers, even though successive generations without new 'white blood' reverted their complexions to African tones.<sup>140</sup> As Honório Pereira Barreto's economic status granted him 'whiteness', poverty could also bring the white settler closer to the uncivilised, being perceived as a source vulnerability of colonial authority.

Colonial elites and political agents in the other colonial powers shared concerns with the presence of this population of lesser whites similar to the ones expressed by Armindo Monteiro. European colonisers adopted a variety of strategies to regulate lower class Europeans as a measure of social control of potential sources of degeneracy in colonial context: repatriation, the creation of relief funds or efforts to rehabilitate this population through schooling or psychiatric treatment were amongst them.<sup>141</sup> As the

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<sup>139</sup> Woollacott, Angela (2009), 'Whiteness and 'the imperial turn'', in Boucher, Leigh, Carey, Jane, & Ellinghaus, Katherine (eds.), *Re-orienting Whiteness*, New York, Palgrave Macmillan, p. 23

<sup>140</sup> Hammond, Richard (1966), *Portugal and Africa. 1815-1910. A Study in uneconomic Imperialism*, Stanford, Stanford University Press, pp. 49-50.

<sup>141</sup> On debates about the poor whites in early nineteenth-century Barbados see Lambert, David (2001), 'Liminal figures: poor whites, freedmen, and racial reinscription in colonial Barbados', *Environment and Planning D: Society and Space*, 19 (3), pp. 335 - 350. On poor whites in Kenya, see Lonsdale, John (2010), 'Kenya: Home Country and African Frontier' in Robert Bickers (ed.) *Settlers and Expatriates: Britons over the Seas*, Oxford, Oxford University Press, pp. 74-111, and Jackson, Will (2011), 'Bad Blood: Poverty, Psychopathy and the Politics of Transgression in Kenya Colony, 1939-1959', *Journal of Imperial and*

problem reached its higher proportions around the world in the 1930s as a consequence of the economic crisis, *Estado Novo* attempted to eliminate it at its root, sturdily conditioning the migration for the colonies in order to prevent the establishment of a Portuguese population which could be a menace to the self-preservation and prestige of colonial order.

*Estado Novo*'s policy was not undisputed, though. Two main strands of criticism can be identified. The first – more common in mainstream media – was related with what was considered an excessive selection of the settlers. The central idea was that Portugal was already in its third colonial empire, having a considerable and positive experience on settlement. The creation of a great white nation as Brazil had been made with what was possible at the time, without putting much effort on selection. Improvisation had, thus, been fruitful. Despite not being the most common amongst colonial intelligentsia, a handful of speakers shared this view, defending it during the First Congress on Colonisation, which was held in Oporto in 1934 as a complement to the Colonial exhibition. Hence, Alfredo Augusto Lisboa de Lima, former minister of Colonies during the First Republic and professor at the Higher Colonial School, recalled the role of lower classes in the exploration of Brazil beyond the shoreline, claiming that Mozambique and Angola required a similar non-bureaucratic population to grow.<sup>142</sup> In a similar vein, Simão Sasportes explained why selection was obstructing the whitening of the Portuguese African colonies by making use of examples from the past:

North America, South Africa, Australia or even Brazil, etc., were not made with chosen people, with technicians, professors, literati, with poets. It was nothing like that! What is known today is that [those nations] were made with

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*Commonwealth History*, 39 (1), pp. 73-94. On India, see Fischer-Tiné, Harald (2009), *Low and Licentious Europeans. Race, Class and 'White Subalternity' in Colonial India*, New Dehli, Orient Blackswan or Mizutani, Satoshi (2009), "Degenerate whites' and their spaces of disorder: Disciplining racial and class ambiguities in Colonial Calcutta (c.1880-1930)' in Ashwini Tambe and Harald Fischer-Tiné (eds.), *The Limits of British Colonial Control in South Asia: Spaces of Disorder in the Indian Ocean Region*, New York-London, Routledge, pp. 155-191. On Dutch Indies, see Ann Laura Stoler's aforementioned works.

<sup>142</sup> AHU, MU, AGC, 2G, 950 - Exposição Colonial Portuguesa, 1ª Porto (Congressos), 'A.A. Lisboa de Lima – A Colonização e o povoamento nas colónias de Angola e Moçambique', pp. 12-13

convicts, pariahs, people with wretched lives, adventurers, unfortunate people; in a word, with the scum of societies.<sup>143</sup>

In his turn, Lieutenant Colonel José Ribeiro da Costa Júnior, an aged military with experience in Angola's pacification wars, used Portuguese past experience to advocate for resuming deportation of convicts as a straightforward measure to successfully increase European settlement in Angola and Mozambique.<sup>144</sup> In his opinion, a criminal would not be accepted by the society in which he had been condemned; therefore, the rehabilitation through labour in a new society would be useful both at an individual level and to help build the colonies.<sup>145</sup> The longer the punishment, the better – he believed – as the ties connecting the convict to the motherland would be weaker after he served his time, facilitating his decision to settle. Ribeiro da Costa Júnior did not suggest convicts should be sent for the colonies indiscriminately, though. Selection of potential settlers amongst the convicts was decisive: yet, he believed it should be based on the convicts' skills for agricultural work rather than on moral grounds.<sup>146</sup>

Unlike the view of Vicente Ferreira, which feared the competition between poor whites and Africans, in Alfredo Augusto Lisboa de Lima's, Ribeiro da Costa Júnior's

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<sup>143</sup> 'Mesmo modernamente, não consta que a América do Norte, a África do Sul, a Austrália e mesmo o Brasil, etc., se tivessem feito com pessoas escolhidas, com técnicos, com catedráticos, com literatos, com poetas. Nada disso. O que consta é que se fizeram com condenados, párias, desesperados da vida, aventureiros, desgraçados, toda a chicória das sociedades'. Sasportes, Simão (1934), *A Colonização branca e o Aumento de População Indígena em Angola e Moçambique*, Lisbon, Diário de Notícias, p. 9

<sup>144</sup> AHU, MU, AGC, 2G, 950 - Exposição Colonial Portuguesa, 1ª Porto (Congressos), "Ribeiro da Costa Júnior - Como fomentar com êxito a colonização branca das colónias de Angola e Moçambique". See also Ribeiro da Costa Júnior, José (1934), 'Como fomentar com êxito a colonização branca das colónias de Angola e Moçambique', in AAVV, *Conclusões das teses apresentadas ao Primeiro Congresso da Colonização*, Oporto, Imprensa Moderna, pp. 20-27.

<sup>145</sup> On the belief on the potential of transformation of criminals into honest settlers, which oriented similar efforts by other imperial powers mostly in the nineteenth century, see, for instance, Nicholas, Stephen (1988) (ed.), *Convict Workers: Reinterpreting Australia's Past*, Cambridge, Cambridge University Press, and Toth, Stephen (2006), *Beyond Papillon: The French Overseas Penal Colonies, 1854-1952*, Lincoln and London, University of Nebraska Press.

<sup>146</sup> AHU, MU, AGC, 2G, 950 - Exposição Colonial Portuguesa, 1ª Porto (Congressos), 'Ribeiro da Costa Júnior - Como fomentar com êxito a colonização branca das colónias de Angola e Moçambique', p. 6.

and Saportes's understanding the coloniser's whiteness was an element of civilisation *per se*. From this perspective, as a member of a superior race, the coloniser would always exert a positive influence, elevating the colonised. Settlers' class, education, and previous morality and behaviour should be devalued taking into account the deficit of Europeans in the two major Portuguese colonies. Although both Ribeiro da Costa Júnior and Sasportes recognised that the quality of the settler was desirable, quantity was seen as more important than quality at the time. The 'scum of society', to use Sasportes's designation, was, thus, not expendable. However, this view was not a commonplace amongst Portuguese colonial intelligentsia.

The second – and most common – strand of criticism of *Estado Novo*'s policies regarding settlement was not predicated on the selection of the settlers but rather on the preparation for settlement. What was perceived as a problem was not the fact that the government considered the typical emigrant unfit for colonial spaces due to the lack of capital and skills and, as a consequence, was delaying the European settlement in Portuguese Africa. On the contrary, it was recognised that the human contingent available for migration was not prepared for that settlement in Africa. Many settlers in state directed settlement schemes prior to the *Estado Novo* did not have previous farming experience and, the ones who have it, were not prepared for agriculture in the colonial context. The criticism was that the government did not take action to make the typical emigrant fit for settlement or to make the colonies fit for receiving the European population currently 'lost' in transatlantic migratory flows. Creating conditions for the settlement of Europeans, facilitating their migration from the metropole, and investing in their formation were frequently appointed as the most efficient solution not only for creating wealth but also for 'Portugalising' the colonies.

The creation of course for settlers had been planned (and legislated accordingly) in 1919. The course was to be taught at the Higher Colonial School over two years, including geography, ethnology, history of Portuguese colonisation, notions on cultivation of colonial products, accounting and administration, as well as notions of hygiene and basic colonial medicine and veterinary.<sup>147</sup> However, it was not materialised. As such, the inexistence of a school or course devoted to practical aspects

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<sup>147</sup> Decree 5.827, *Diário do Governo*, 31<sup>st</sup> May 1919.

of colonisation, which could complement the preparation of colonial civil servants at the Higher Colonial School, was a major issue in the public debates on European settlement in the Portuguese colonies. Priest and missionary António Miranda de Magalhães suggested the introduction of colonial subjects in general practical courses in the existing technical schools in the metropole: in his opinion, a two year long course for settlers ministered in the Higher Colonial School as had been proposed in 1919 and retrieved in public debates in the late 1930s was not viable; the usual prospective settler who needed to migrate would not afford such course in Lisbon.<sup>148</sup> Yet, Miranda de Magalhães's suggestion did not satisfy the advocates for a School for colonisation. The German Colonial School for Agriculture, Trade and Industry of Witzenhausen, in northern Germany, was frequently mentioned as a model institution for its theoretical and practical courses, being looked simultaneously with admiration and fear. As Agostinho de Campos stressed in an article copiously illustrated with pictures of Witzenhausen's students performing various chores, Germany 'does not have colonies any more but expects to have them again'; in the meantime, the number of students was growing and the school is 'preparing hundreds of young men for colonial life, either in its own home or in others'.<sup>149</sup>

Henrique Galvão, for instance, suggested the creation of *Institutes of Colonisation* to be located in rural areas in the metropole. These institutions would admit orphans of both genders until the age of 14. Those who were considered suitable for settlement by their instructors would then be transferred to Angola or Mozambique, where they would continue their education until the age of 18. After reaching majority, male students would be provisionally granted a piece of land, which they would work under surveillance for two years. After that time, in which they were supposed to find a suitable wife, they could become settlers in the true sense. Meanwhile, female students whose education would be guided by a missionary nun, would be waiting for marriage. Married couples in which both elements had been pupils at the Institutes of Colonisation

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<sup>148</sup> Magalhães, António Miranda de (1938), 'Problemas de colonização' in *Humanidade*, 67 (16<sup>th</sup> July 1938), p. 9.

<sup>149</sup> Agostinho de Campos (1932), 'Uma carta mensal de Portugal para as colónias', *Portugal Colonial*, 13 (March 1932), pp. 1-3

would be favoured on the occasion of selection of settlers and distribution of land.<sup>150</sup> A similar idea can be found in Francisco Vieira Machado's draft project of European settlement in Angola in 1939.<sup>151</sup>

In a similar vein, a participant in the First Congress on Colonisation suggested the creation of Schools of Pioneers (*Escolas de Pioneiros*), inspired in Kingsley Fairbridge's Farm School created in 1909 in Western Australia.<sup>152</sup> The idea was sent metropolitan orphan children around the age of 10 to the colonies. At this early age, it was argued, children were not yet linked to the metropole by the time they left it; once they reached adulthood, they would feel the colony where they had been placed as their home. The Schools of Pioneers should welcome children of both genders: while boys would receive technical training for a life as farmers, being later granted small farms, girls would be educated by older female rural settlers, the only ones who had a practical knowledge of the life they were meant to have.<sup>153</sup>

In common, these projects stressed not only the need for technical preparation of the settler but also the importance of educating female settlers for their supporting role. In the imagery of Portuguese settlement, married couples were always seen as the 'ideal unit of settlement'. On the one hand, settlers were advised to go as a couple not only for the companionship that was essential to 'soften homesickness' and 'instill courage and

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<sup>150</sup> Galvão, Henrique (1936a), *O Povoamento europeu nas Colónias portuguesas*, Lisbon, Ministério das Colónias; Galvão, Henrique (1936b), *Bases para o Povoamento Europeu nas Colónias Portuguesas*, Lisbon, Ministério das Colónias; Galvão, Henrique (1937), *Angola. Para uma Nova Política*, Lisbon, Livraria Popular. Galvão, Henrique (1940), 'Zonas colonizáveis de Angola e soluções aconselháveis para intensificar a sua colonização' in *Congresso do Mundo Português. XV Volume: Memórias e comunicações apresentadas ao Congresso Colonial*, Lisbon, Comissão Executiva dos Centenários, pp. 269-399.

<sup>151</sup> Vieira Machado, Francisco (1940), 'Acção Colonizadora do Estado' in *Colonização. Projectos de Decretos*, op. cit.

<sup>152</sup> For a short account on Kingsley Fairbridge's Farm Schools, see Sherington, Geoffrey (2001), 'Fairbridge Child Migrants' in Lawrence, Jon and Pat Starkey (eds.), *Child Welfare and Social Action in the Nineteenth and Twentieth Centuries*, Liverpool, Liverpool University Press, ch. 3, pp. 53-81.

<sup>153</sup> The author's complete name is undecipherable in the documentation. AHU, MU, AGC, 2G, 950 - Exposição Colonial Portuguesa, 1ª Porto (Congressos), Emigração Infantil - Escolas de Pioneiros, p. 2.

hope'<sup>154</sup> but also – and above all – to avoid ‘enticing temptations of the environment and climate’, to use a contemporary euphemism for the anxieties concerning the involvement with African women.<sup>155</sup>

On the other hand, women were represented as the genuine bearers of Portuguese-ness. In the metropole or in the colonies, family was the cornerstone of society in Salazarism ideology.<sup>156</sup> Women naturally fostered the environment of the family and replicated national traditions. In colonial context, giving birth to racially pure Portuguese was also a crucial function of female settlers. In fact, a professor at the Higher Colonial School, Jesus Nunes dos Santos, even suggested that women should be submitted to medical exams prior to their move to the colonies in order to assess ‘whether there are anatomic or merely functional abnormalities’ that could compromise their natural purpose as females.<sup>157</sup> Women emerged, thus, as key elements for a successful colonisation due to their role as reproducers. In accordance with this perspective, by performing their expected biological role and domestic duties in the colonial context, they would assure the family home and the following generation would remain Portuguese and uncontaminated by local excess.<sup>158</sup>

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<sup>154</sup> Minister of Colonies Francisco Vieira Machado at the inaugural speech of the 1936 Colonial High-Culture Conferences transcribed in *O Mundo Português*, 27 (March 1936), p. 96.

<sup>155</sup> Serrano, Manuel (1945), *Conselhos Práticos aos colonos sobre economia e administração*, Lisbon, Sociedade de Geografia de Lisboa.

<sup>156</sup> On the vision about the role of women in society during Estado Novo, see Brasão, Inês (1999), *Dons e Disciplinas do corpo feminino: os discursos sobre o corpo na história do Estado Novo*, Lisboa, CIDM; Neves, Helena and Maria Calado (2001), *O Estado Novo e as mulheres: O Género como Investimento Ideológico e de Mobilização*, Lisbon, Biblioteca Museu República e Resistência; Cova, Anne and António Costa Pinto (2002), ‘Women Under the Salazar’s Dictatorship’ in *Portuguese Journal of Social Science*, 2, pp. 129-146; Pimentel, Irene Flunser (2011), *A cada um o seu lugar. A política feminina do Estado Novo*, Lisbon, Temas e Debates.

<sup>157</sup> Santos, Jesus Nunes (1945), *Como o Colono se deve preparar para a sua viagem*, Lisbon, Sociedade de Geografia de Lisboa, p. 22.

<sup>158</sup> See Cardoso, Maria Celeste (1945), *A Mulher na família do colono*, Lisbon, Sociedade de Geografia de Lisboa. Literature about or approaching the civilising influence of female settlers in colonial contexts in other colonial empires is vast. For a short account, see Harper, Marjory and Stephen Constantine (2010), ‘A Civilizing Influence? The Female Migrant’ in Idem (eds.), *Migration and Empire*, Oxford, Oxford University Press, or Hammerton, A. James (2004), ‘Gender and Migration’ in Philipa Levine (ed.), *Gender and Empire*, Oxford, Oxford University Press, pp. 156-180.

At the end, no institution was created for the preparation of metropolitan women and men for rural settlement in the colonies. When compelled to intensify European settlement in Portuguese Africa due to the international decolonisation wave in the aftermath of the Second World War, *Estado Novo*'s administrators had to make concessions on the idealised New Portugal in Africa. As such, the increase of the number of Portuguese settlers in Africa was mainly an urban phenomenon; moreover, it was fuelled by the non-skilled population that Armindo Monteiro tried to debar after taking over the portfolio of the Colonies in 1931. Portuguese agricultural settlements in African colonies – including Cela's model settlement – were not a replication of metropolitan rural spaces but rather farms explored by people that in many cases did not have any previous experience in agriculture and with the use of African cheap labour.

Debates on emigration, settlement, and colonisation are enlightening as a site of experimentation in which the discourses on what Portugal and the Portuguese were come to grips with the discourses on what they should be. None of these discourses were monolithic, even though concerns regarding the intensification and consolidation of Portuguese presence in the colonies and the metropolitan surplus population were widely shared. It is important to stress that only a minority of the intervenients in this debate favoured a relaxed approach to settlement, being confident about the Portuguese settler's capacities revealed in centuries of colonisation and about the natural superiority of the colonisers. The majority insisted on the need to change to Portuguese method, notwithstanding publicly praising it when comparing it to other European colonial powers' method. Insisting on the need of preparation and planning to avoid mistakes that could undermine the relationship between coloniser and colonised is at odds with one of the most pervasive tropes that could be found in the discourses of empire in the 1930s and 1940s: the idea that the Portuguese were natural colonisers, which is the subject of the following and final chapter.



## 5. COLONISING WITH HEART AND GUTS: THE PORTUGUESE AS NATURAL COLONISERS

In 1945, the Geographical Society of Lisbon published a set of seven brochures with practical advice for prospective settlers as part of the celebration of the Week of the Colonies, a propagandistic event organised by the institution since 1925.<sup>1</sup> An array of topics, such as the treatment of indigenous people, clothing and housing in the tropics, prophylactic measures against mosquitoes, or management basic notions, were concisely approached by invited colonial experts. Amongst them was Heitor Mascarenhas Inglês, a military civil engineer and former director of Public Works in both Timor and Angola who had been was invited to write about the construction of settlers' housing.<sup>2</sup> Before expounding on concrete house floor plans and giving

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<sup>1</sup> On the Week of Colonies, see Paulo, João Carlos Duarte (1992). "*A Honra da bandeira*". *A educação colonial no sistema de ensino português (1926 - 1946)*, Lisbon, Faculdade de Ciências Sociais e Humanas - Universidade Nova de Lisboa (unpublished dissertation).

<sup>2</sup> Inglês, Heitor Mascarenhas (1945), *Habitação do Colono. Alguns Conselhos Práticos*, Lisbon, Sociedade de Geografia de Lisboa. For the remaining volumes of the collection, see Santos, Alvaro Afonso (1945), *Breves Conceitos para um Ideário de Colonização Portuguesa*, Lisbon, Sociedade de Geografia de Lisboa; Santos, Jesus Nunes (1945), *Como o Colono se deve preparar para a sua viagem*, Lisbon, Sociedade de Geografia de Lisboa; Azevedo, João Fraga and Francisco Cambournac (1945), *Alguns preceitos de hygiene tropical*, Lisbon, Sociedade de Geografia de Lisboa; Metello, António (1945), *A Vida Social das Colónias*, Lisbon, Sociedade de Geografia de Lisboa; Cardoso, Maria Celeste (1945), *A Mulher na Família do Colono*,

additional recommendations for different colonial contexts, Heitor Mascarenhas Inglês offered some general pieces of advice to the prospective settler who had to build his own accommodation. His line of reasoning was extremely curious. First, he advised the settler to get prepared in the metropole by revising his know-how about construction and studying the area where his house was to be built and the available resources to do so. If not familiar with construction and/or he was unsure about the location where he would settle, the settler should purchase handbooks on the subject before his departure to the colonies. If that was not possible, the author assured it was likely that the settler could hire some construction workers once in the colony. If that was not possible either, there was still no reason to despond, according to Heitor Mascarenhas Inglês. What followed was a startling suggestion for this situation. It is worth quoting it at length:

In the face of many difficulties that you may encounter, there is another reason for not losing your cheerfulness. Remember that you are Portuguese; do realise that your ancestors, who lived and explored the African hinterland even though they were away from everything and everyone and often lacking the most basic resources, demonstrated having an unsurpassed energy and an ingenious spirit for improvisation. These features allowed them to triumph over numerous and far greater difficulties encountered at the time [than the ones you can encounter now].

Therefore, trust in yourself, trust in your gut, and trust in your inventive mind...<sup>3</sup>

To be sure, Heitor Mascarenhas Inglês stressed throughout his text that it was always preferable to use technical advice from architects, engineers, physicians familiar with colonial prophylaxis or even advice from other settlers already established. Yet,

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Lisbon, Sociedade de Geografia de Lisboa; Serrano, Manuel (1945), *Conselhos Práticos aos colonos sobre economia e administração*, Lisbon, Sociedade de Geografia de Lisboa.

<sup>3</sup> 'Em face de muitas dificuldades que possa ter, outra razão para não perder o ânimo. Lembre-se que é português e saiba que os seus antecessores, que exploraram e viveram o sertão africano, longe de tudo e de todos, desprovidos muitas vezes dos mais elementares recursos, demonstraram inextinguíveis faculdades de energia e engenhoso espírito de improvisação que lhes permitiram vencer as inúmeras e bem maiores dificuldades que então se lhes deparavam. Confie portanto em si, na sua intuição, no seu espírito inventivo.' Inglês, Heitor Mascarenhas (1945), *Habitação do Colono. Alguns Conselhos Práticos*, Lisbon, Sociedade de Geografia de Lisboa, p. 9

believed that the Portuguese had innate capacities for improvising and successfully adapting to the environment in the imperial dominions. For him, this inventiveness was a unique trait of the Portuguese people, being part of the natural temperament that had made Portugal's colonial empire possible. Therefore, being Portuguese was halfway to have problems solved in the colonies.

The idea that a specific national character was the main factor shaping the past, present, and future of the nation was hardly new. It was not exclusive of Heitor Mascarenhas Inglês's cosmovision, playing a central role in the representation of Portugal as a colonial power. In fact, it was not exclusively Portuguese either. The purported existence of psychological traits specific to the people of each nation and rooted in primordial times lay at the core of modern nationalism: it is a vital feature for individualising nations by differentiating them from the others and naturalising them. Joep Leersseen has shown how nations were categorised during the seventeenth century based on stereotypes and prejudices that would be consolidated and endorsed by the Enlightenment's philosophy and the novel 'study of mankind'.<sup>4</sup> This codification and crystallisation of 'national characters' (or 'national temperaments' or 'race soul', as they were also called) received increased attention with the emergence of *Völkerpsychologie* – which has been roughly translated as 'folk psychology', 'popular psychology', 'national psychology', 'anthropological psychology', or 'ethnic psychology' – in Germany in the 1850s and its spread in Europe.<sup>5</sup> Despite making a way into Portuguese imaginings of the nation as well, folk psychology did not develop into an academic discipline in Portugal. First attempts to assess and systematise the Portuguese national character in the late nineteenth century and early twentieth century were led by nonprofessional ethnologists, philosophers, and poets. In common, their approaches put the experiencing of affective and emotional states at the core of

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<sup>4</sup> Leerssen, Joep (2006), 'Anthropology and the Nation: Character and Climate in the Seventeenth Century' in Idem, *National Thought in Europe. A Cultural History*, Amsterdam, Amsterdam University Press, pp. 52-70.

<sup>5</sup> On the origin of *Völkerpsychologie* see Klautke, Egbert (2013), *The Mind of the Nation. Völkerpsychologie in Germany, 1851-1955*, Berghahn Books, especially chapter 1, pp. 11-57.

Portuguese national character.<sup>6</sup> This emphasis on sentimental constants influenced posterior perspectives, penetrating also into approaches that are more scientific.

An example is António Jorge Dias, the first Portuguese cultural anthropologists to have received formal training in his academic field. Jorge Dias had been particularly exposed to *Völkerpsychologie* during his graduate studies in Germany. He completed a doctorate in *Volkskunde* in Munich during the Second World War.<sup>7</sup> Before his thesis was complete, he moved to Berlin as a lecturer in Portuguese at the University of Berlin, having studied with Anthropologist and Ethnosociologist Richard Thurnwald, founder of the *Zeitschrift für Völkerpsychologie und Soziologie* (Journal of Folk Psychology and Sociology), at a time this Austro-German scholar was particularly vocal about the need of ethnographic research at home alongside research on non-European colonised societies.<sup>8</sup>

Jorge Dias's methodical summation of the Portuguese national character was first presented in October 1950 during the International Colloquium on Luso-Brazilian Studies held in Washington DC.<sup>9</sup> Hence, it preceded the author's turn to colonial anthropology in the late 1950s. Nevertheless, Jorge Dias's portrayal of the national temperament already stressed many peculiar characteristics with resonance on the

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<sup>6</sup> See Leal, João (2000), 'Psicologia Étnica: invenção e circulação de estereótipos' in Idem, *Etnografias Portuguesas (1870-1970): Cultura Popular e Identidade Nacional*, Lisbon, Publicações D. Quixote, pp. 83-97.

<sup>7</sup> In a letter to his longtime friend and fellow Ernesto Veiga de Oliveira, Jorge Dias defined his studies as a kind of Human Geography 'with a greater extend and a much greater depth' rather than Folklore studies. Jorge Dias's letter to Ernesto Veiga de Oliveira, 25<sup>th</sup> July 1942, fully reprinted in Leal, João (2008), 'A Energia da antropologia. Seis cartas de Jorge Dias para Ernesto Veiga de Oliveira', *Etnográfica*, 12 (2), p. 509. See also Dias, Jorge (1957), *Etnologia, Etnografia, Volkskunde e folklore*, Porto, Centro de Estudos de Etnologia Peninsular (offprint of the journal *Douro Litoral, Boletim da Comissão de Etnografia e História*, VIII Series, 1-2).

<sup>8</sup> Steinmetz, George (2009), 'Neo-Bourdieuian theory and the question of scientific autonomy: German sociologists and empire, 1890s-1940s', *Political Power and Social Theory*, 20, pp. 71-131.

<sup>9</sup> Dias, Jorge (1953), 'Os Elementos Fundamentais da Cultura Portuguesa', *Proceedings of the International Colloquium on Luso-Brazilian Studies: Washington, October 15-20, 1950*, Washington, Vanderbilt University Press, pp. 51-65. Here quoted from Dias, Jorge (1990), 'Os Elementos Fundamentais da Cultura Portuguesa', Idem, *Estudos de Antropologia*, Lisbon, Imprensa Nacional-Casa da Moeda, Vol. I, pp. 135-157.

colonial enterprise, considering the Atlantic attraction as the core of the national soul.<sup>10</sup> Which traits defined the collective psyche of the nation in Jorge Dias's view? In a nutshell, he claimed that the Portuguese embodied an 'expansive and dynamic temperament',<sup>11</sup> having an 'enormous capacity to adapt to all things, ideas or people', as well as exceptional 'qualities of action, abnegation, sacrifice, and courage'.<sup>12</sup> It was also part of the national character to be 'profoundly humane, sensible, loving, and kind, but not weak'.<sup>13</sup> For that reason, Jorge Dias asserted that 'profit and utility' had always been placed second in relation to humanistic values, revealing a 'mentality that is the antithesis of the capitalist spirit'.<sup>14</sup> All these characteristics were related to the fact that 'for the Portuguese, the heart is the measure for everything'.<sup>15</sup> In this way, Jorge Dias invested existing commonplaces with a recognised scientific authority, consolidating them.

This chapter will explore two myths associated with the Portuguese colonial empire that were formalised in Jorge Dias's ethnic psychology of the Portuguese people but were already consolidated and widely circulated in Portugal in the 1930s and 1940s. On the one hand, the myth that Portuguese imperialism was not economically motivated, being built on and maintained with higher values in mind. On the other hand, the myth that the Portuguese colonial empire was predicated on non-violence against the colonised peoples, being inspired by love. These two intertwined traits that stemmed from the natural qualities of the Portuguese race were regarded as the distinctive factors of Portugal's empire. A crucial aspect here is that the Portuguese empire was not presented as merely different from any other imperial construction formed by other European colonial powers. Difference entailed moral hierarchy here. These two traits were the keystone for the self-definition of Portuguese colonialism as diametrically opposed to other European colonialisms, not sharing the fundamental tenets generally

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<sup>10</sup> Idem, p. 142.

<sup>11</sup> Idem, p. 147.

<sup>12</sup> Idem, p. 146.

<sup>13</sup> Idem, p. 145.

<sup>14</sup> Idem, p. 155.

<sup>15</sup> Idem, p. 149.

assigned to colonialism as a form of domination itself. As such, they were the foundation in which the discourse on Portuguese exceptionalism was rooted.

## 5.1. The Portuguese Uneconomic Imperialism

The myth of the Portuguese uneconomic imperialism was remarkably debunked in the 1980s. By offering an analysis richly illustrated with statistics and other economic indicators on trade and finance ranging up the decolonisation process, Clarence-Smith attempted to show that the Portuguese colonial project did not differ from the one of other European powers in its capitalist motivations. Even though the revenues were not always as successful as in other colonial empires due to the metropolitan economic fragility, the aim was essentially the same.<sup>16</sup> His study was motivated by the observation that the thesis of indifferentism to colonial profitability predominated in historical research on the Third Portuguese Empire. This idea that Portuguese colonialism was not economically motivated had gained momentum after British economic historian Richard J. Hammond, who coined the label ‘uneconomic imperialism’ in his study on Portugal and the Portuguese territories of Africa.<sup>17</sup> Although Richard Hammond initially focused his research on the nineteenth century only, he later extended the analysis to the twentieth century as well.<sup>18</sup>

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<sup>16</sup> Clarence-Smith, W.G. (1979), ‘The Myth of Uneconomic Imperialism: the Portuguese in Angola, 1836-1926’, *Journal of Southern African Studies*, 5 (2), pp. 165-180; Clarence-Smith, W. G. (1985), *The Third Portuguese Empire, 1825-1975. A Study in Economic Imperialism*, Manchester, Manchester University Press.

<sup>17</sup> Hammond, Richard J. (1966), *Portugal and Africa, 1816-1910: A Study in Uneconomic Imperialism*. Stanford, Stanford University Press; Hammond, Richard J. (1961), ‘Economic Imperialism, Side-lights on a Stereotype’, *Journal of Economic History*, 21 (4), pp. 582-598.

<sup>18</sup> Hammond, Richard J. (1975), ‘Some economic aspects of Portuguese Africa in the Nineteenth and Twentieth Centuries’ in P. Duigan and L.H. Gann (eds.), *Colonialism in Africa, 1870-1960, IV – The Economics of Colonialism*, Cambridge University Press, pp. 250-280. Examples of the penetration of Hammond’s view can be found in Douglas, Wheeler and René Pélissier (1971),

In accordance with the trends of British economic history in the 1950s and 1960s, Richard Hammond moved away from the economic theory of imperialism drawn on John A. Hobson's work. For Hobson, the origin of the new wave of imperialism from the late-nineteenth-century onwards laid on the emergence of a powerful industrial class in need of new outlets for its capital and surplus goods, pressuring political forces in direction to expansionism.<sup>19</sup> Hobson's narrow approach had become the subject of many criticisms. In their seminal article on the imperialism of free trade, John Gallagher and Ronald Robinson had already stressed the importance of political and social factors for the transition from an 'informal empire', which was based on the British superiority made evident by free trade, to a 'formal empire', consolidating British interests when those were menaced.<sup>20</sup> In his turn, Henri Brunschwig argued that metropolitan nationalism had been an important complementary cause of imperialism in study on the French expansion.<sup>21</sup> Yet, in neither case economic factors were foregone. Richard Hammond aimed to go even further: he intended to show that the Portuguese case absolutely invalidated Hobson's and Hobson-inspired Marxist interpretations of the phenomenon, questioning the significance of imperialism economic causes.

Hammond's argument was centred on the idea that Portugal's backwardness prevented the creation of a strong capitalist class as the one discussed in Hobson's work as the key agent to the expansionist wave; nevertheless, Portugal did actually expand its territories at the age of new imperialism, competing with wealthier European powers in the race for Africa. He concluded that Portuguese colonialism resulted from political and ideological motivations, being caused by pride and the desire of boasting the colonial power status. From his point of view, the Portuguese colonies were perceived as 'a symbol of [the Portuguese] place in the world, even a warranty of their

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*Angola. Westport*, Connecticut, Greenwood Press; Davidson, Basil (1972), *In the Eye of the Storm: Angola's people*, London, Longmans; Papagano, Giuseppe (1980), *Colonialismo e Feudalismo. A Questão dos Prazos da Coroa em Moçambique nos Finais do Século XIX*, Lisbon, A Regra do Jogo; Newitt, Malyn (1981), *Portugal in Africa: The Last Hundred Years*, London, Christopher Hurst & Co.

<sup>19</sup> Hobson, John A. (1902), *Imperialism. A Study*, New York, James Pott & Co.

<sup>20</sup> Gallagher, John and Ronald Robinson (1953), 'The imperialism of Free Trade', *The Economic History Review*, New Series, 6 (1), pp. 1-15.

<sup>21</sup> Brunschwig, Henri (1960), *Mythes et Réalités de l'Imperialisme Colonial Français, 1871-1914*, Paris, A. Colin, p. 154

independence as a nation' rather than a source of wealth.<sup>22</sup> In Hammond's opinion, the concept of 'conspicuous consumption', a term coined by the economist and sociologist Thorstein Veblen to define the purchase of expensive goods and services as a means to exhibit real or aspired wealth and status, was thus better suited for the study of Portuguese colonialism than Hobson's notions of capital accumulation, metropolitan under-consumption or need for capital and goods export.<sup>23</sup> Briefly, the Portuguese empire was a far too big venture for the available resources that was continued by political power for the sake of national greatness, even though the limitations were visible.

By the time Richard Hammond published his article in the *Journal of Economic History* first calling attention to the Portuguese deviation from economic imperialism,<sup>24</sup> in Portugal the official Committee for the commemoration of the fifth centenary of the Prince Henry the Navigator's death refused the publication of a book on the economics of the Discoveries authored by the Portuguese historian Vitorino Magalhães Godinho. The book, which had been commissioned by the Committee itself, had purportedly been guided by a spirit that was 'very different from the one that presided over Henry's commemorations'.<sup>25</sup> The manuscript handed by Magalhães Godinho, an adherent to the founding principles of the *Annales* School and formerly colleague of Lucien Febvre, Fernand Braudel, Ernest Labrousse, George Gurvitch and Carlo Cipolla, amongst others, at École Pratique des Hautes Études, was considered 'too economic, almost

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<sup>22</sup> Hammond, Richard J. (1961), 'Economic Imperialism, Side-lights on a Stereotype', *Journal of Economic History*, 21 (4), p. 589.

<sup>23</sup> Hammond, Richard J. (1966), *Portugal and Africa, 1816-1910: A Study in Uneconomic Imperialism*. Stanford, Stanford University Press, p. 335. See also Veblen, Thorstein (1912 [1899]), *The theory of the leisure class. An economic study of institutions*, New York, Macmillan, especially ch. IV.

<sup>24</sup> Hammond, Richard J. (1961), 'Economic Imperialism, Side-lights on a Stereotype', *Journal of Economic History*, 21 (4), p. 589

<sup>25</sup> Letter from the president of the Committee for the commemoration of the fifth centenary of the Prince Henry the Navigator's death, J. Caeiro da Matta, to Vitorino Magalhães Godinho, 27<sup>th</sup> January 1961, facsimiled in Godinho, Vitorino Magalhães (2008), *A Expansão Quatrocentista Portuguesa*, Lisbon, Publicações D. Quixote, p. 16.

Marxist.’<sup>26</sup> Notwithstanding going beyond the timeframe of this study, this episode illustrates how the official rhetoric during the *Estado Novo* overlapped Hammond’s theorisation in many aspects, promoting an image of Portuguese uneconomic imperialism as a national constant from the early days of the empire. In the following, we will see the similarities and differences between the Portuguese uneconomic imperialism as promoted in the narratives disseminated in Portugal in the 1930s and 1940s and Hammond’s work.

### **5.1.1. The original principle: religion vs. profit in the genesis of Portuguese empire**

What was at the origin of the Portuguese empire? What led a small, peripheral European country to embark on the overseas expansion into the unknown in the fifteenth century? These questions dominated the debate on the history of the Discoveries led by Portuguese researchers at the turn of the 1930s. It is important to bear in mind the context in which this discussion took place. First, the political context was favourable to the ideological manipulation of the production of historical narratives. As Eric Hobsbawm stressed, the writing of history has always been ‘mixed up in politics’, supplying the essential raw material for nationalists.<sup>27</sup> The fabrication of the glorious past of a nation is an essential component of nationalism, being the rule, not the exception, in nationalist dictatorships like *Estado Novo*. Second, Portuguese historiography significantly lagged behind the level of consolidation and professionalisation already achieved in other Western European countries in the course

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<sup>26</sup> Godinho, Vitorino Magalhães (2008), *A Expansão Quatrocentista Portuguesa*, Lisbon, Publicações D. Quixote, p. 11.

<sup>27</sup> Hobsbawm, Eric (1992), ‘Ethnicity and Nationalism in Europe Today’, *Anthropology Today*, 8 (1), p. 3.

of the long nineteenth century.<sup>28</sup> The weak institutionalisation of History as a scientific field resulted in the lack of rigorous, identifiable standards for history writing, blurring the line between researchers engaged in critical enquiry and analysis and writers of politicised versions of history. Political power made a skilful use of this lack of institutionalisation, taking charge of the process of consolidation of History itself as the creation of the Portuguese Academy of History in 1936 illustrates.<sup>29</sup> Despite being presented as a scientific institution, the propaganda aims that inspired it were obvious in its statutes: the Portuguese Academy of History was intended to promote ‘research, revision, and rectification of national history in the highest sense of the Portuguese contribution to the progress of civilisation’, facilitating the ‘knowledge of everything related to Portugal’s civilising expansion in the world’ both in Portugal and abroad and being responsible for ‘organising and publishing – by its own initiative or by governmental request – reports regarding historical problems on which there are divergent interpretations’ in order to ‘define the truth for the national interest’.<sup>30</sup>

In addition to these limitations, research on the onset of the Discoveries Age was thwarted by the scarcity of available sources. Besides the faulty organisation of the archival funds, many records prior to 1755 had been destroyed during the Great Lisbon Earthquake. An additional explanation for the lack of sources began to take shape in the

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<sup>28</sup> For an overview on the institutionalisation of historical writing in Europe, see Porciani, Ilaria and Lutz Raphael (eds.), (2010), *Atlas of European Historiography: The Making of a Profession, 1800-2005*, Basingstoke, Palgrave. On the weak and late institutionalisation of the study of history in Portugal, see also Mendes, J. Amado (1996), ‘Desenvolvimento e Estruturação da Historiografia Portuguesa’ in Torgal, Luís Reis, José Amado Mendes and Fernando Catroga (eds), *História da História em Portugal sécs. XIX-XX*, Lisbon, Círculo de Leitores, vol. I, pp. 177-180. See also Curto, Diogo Ramada (2002), ‘O Atraso Historiográfico Português’ in Idem (ed.), *Charles Ralph Boxer. Opera Minora*, Lisbon, Fundação Oriente, volume III, pp. xiii-lxxxvii.

<sup>29</sup> The Portuguese Academy of History was founded as part of a wider reform of the education and research system. See article 39, Decree 26.611, *Diário do Governo*, 19<sup>th</sup> May 1936. However, it only became effective in early 1938.

<sup>30</sup> ‘Estimular e coordenar os esforços tendentes à investigação, revisão e rectificação da história nacional, no sentido superior da contribuição portuguesa para o progresso da civilização, bem como enriquecer a documentação dos inauferíveis direitos de Portugal’; ‘Organizar e publicar, por iniciativa própria ou por indicação do Governo, os processos referentes a problemas históricos sobre os quais haja divergências de interpretação, procurando definir a verdade no interesse nacional’; ‘Publicar, em língua portuguesa e estrangeiras, obras de consulta que facilitem o seguro conhecimento de tudo o que se relacione com a expansão civilizadora de Portugal no mundo’, Article 2, Decree 27.913, *Diário do Governo*, 31<sup>st</sup> July 1937.

1920s: the Portuguese authorities in the fifteenth and sixteenth centuries had deliberately destroyed official records in order to prevent that useful information fell into the hands of Castilian spies. The hypothesis had been first raised in the early 1840s.<sup>31</sup> Yet, it had remained in the realm of pure conjecture until Jaime Cortesão, a major figure in the study of Portuguese Discoveries, despite his training as a physician, developed it into a more substantiated explanation: the so-called ‘theory of national policy of secrecy’.<sup>32</sup> In the words of Cortesão, available sources gave the idea that ‘the Portuguese maritime and colonising enterprise was a least incident in national life’.<sup>33</sup> In his view, it was odd that contemporary chroniclers ignored what was happening at the height of the Portuguese expansion: the events were too important to be absent from the official records, unless this omission was intentional. Cortesão’s thesis was not unanimously accepted by its contemporaries. On the contrary, it inspired passionate debates and many criticisms amongst researchers throughout the 1930s.<sup>34</sup> Nevertheless, it provided a convenient theoretical framework, being at hand to legitimatise speculative construals of silences, questionable indicia, and minced words that went far beyond Cortesão’s initial theorisation. The theory of national secrecy was self-validated: the lack of sources to corroborate it was itself read as its confirmation. As such, the

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<sup>31</sup> Saraiva, Francisco Justino (1841), *Índice Cronológico das Navegações. Viagens, Descobrimientos e Conquistas dos Portuguezes nos Paizes Ultramarinos desde o Principio do Século XV*, Lisbon, Imprensa Nacional, p. IV.

<sup>32</sup> On Jaime Cortesão’s theorisation see, Cortesão, Jaime (1922), *A expedição de Pedro Alvares Cabral e o descobrimento do Brazil*, Lisbon, Aillaud & Bertrand, p. 156 and Cortesão, Jaime (1924), ‘Do sigilo nacional sobre os Descobrimientos. Crónicas desaparecidas, mutiladas e falseadas. Alguns dos feitos que se calaram’, *Lusitânia. Revista de Estudos Portugueses*, vol. I, Fasc. I, p. 45-81.

<sup>33</sup> Cortesão, Jaime (1924), ‘Do sigilo nacional sobre os Descobrimientos’, op. cit., p. 50.

<sup>34</sup> For contemporary critical views, see Duarte Leite articles, ‘O Sigilo nacional dos descobrimientos’, published on the daily newspaper *O Primeiro de Janeiro*, 30<sup>th</sup> July 1936, 5<sup>th</sup> August 1936, 11<sup>th</sup> August 1936 and 2<sup>nd</sup> September 1936; Peres, Damião (1939), ‘Política do Sigilo’ in António Baião, Hernâni Cidade e Manuel Múrias (eds.), *História da Expansão Portuguesa no Mundo*, Lisbon, Ática, vol. II, pp. 17-22 and Pimpão, Álvaro (1938), ‘A Historiografia Oficial e o Sigilo sobre os Descobrimientos’, *Primeiro Congresso da História da Expansão Portuguesa no Mundo*, Lisbon, Ministério das Colónias, vol. II, pp. 199.

inexistence of documental evidence to support any reading of the past of the Discoveries Age was easily devaluated.<sup>35</sup>

To sum up, the debate on the motivations at the origin of the Portuguese empire was wrapped in a political and intellectual context that facilitated the fabrication of the past in order to embellish Portuguese greatness. A major player in this debate was Joaquim Bensaúde. As many of the Portuguese researchers on Portuguese early colonial history at the time, Bensaúde had a background in natural sciences. Bensaúde was already on his forties when he turned to the study of history after a premature retirement from his successful career in civil engineering and management. His initial concerns were related with the scientific aspects of the Portuguese voyages, stemming from the desire to contest what he would later refer as ‘the comedy of German nautical science’ to belittle the glories of the Portuguese voyages of Discovery in the fifteenth and sixteenth centuries.<sup>36</sup> According to this postulated ‘outrageous international campaign’, which had been initiated by Alexander von Humboldt and extended by his pupils, the Portuguese had been able to initiate the maritime expansion only due to German cosmography and astronomy, which had been introduced in Portugal by Martin Behaim.<sup>37</sup> Joaquim Bensaúde’s approach to the study of History was thus a nationalist one from the start, being an attempt to reaffirm Portugal’s uniqueness.

Bensaúde’s reflections on the origins of Portuguese Discoveries beyond their scientific aspects were first presented during a conference in Seville in 1929.<sup>38</sup> In

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<sup>35</sup> Perhaps the best example is the myth of the Nautical School in Sagres in Portugal’s most southwest point that allegedly had been created by Prince Henry the Navigator in order to attract experts in astronomy, navigation and cartography to Portugal. Notwithstanding there was no documental or archaeological evidence to prove its existence but only a dubious non-contemporary reference, the existence of the school was under discussion in the 1930s and 1940s. In fact, the myth is still present in popular culture nowadays.

<sup>36</sup> Bensaúde, Joaquim (1950), *The attacks against Portuguese History*, p. 9.

<sup>37</sup> See Bensaúde, Joaquim (1912), *L’astronomie nautique au Portugal à l’époque des grandes découvertes*. Bern, Max Drechsel; Bensaúde, Joaquim (1917), *Histoire de La Science Nautique Portugaise. Résumé*, Genève, Imprimerie A. Kundig; Bensaúde, Joaquim (1920), *Les legends allemandes sur L’histoire des Découvertes Maritimes Portugaises*, Genève, Imprimerie A. Kundig; Bensaúde, Joaquim (1927), *Les legends allemandes sur L’histoire des Découvertes Maritimes Portugaises - Deuxième Partie*, Coimbra, Imprensa da Universidade.

<sup>38</sup> Bensaúde, Joaquim (1929), *Origines du Plan des Indes – Conférence*, Paris, Libraire Aillaud. He later expanded his argument in Bensaúde, Joaquim (1930), *Lacunes et surprises de L’histoire des Découvertes Maritimes*, Coimbra, Imprensa da Universidade.

accordance with the theory of Great men that predominated at the time, his research was focused on Prince Henry the Navigator, who was presented as the main architect of the maritime expansion and therefore the father of the Portuguese colonial empire. His main argument was that Prince Henry the Navigator's commitment to the expansionist project had a spiritual motivation: the 'enigmatic and mysterious force' that enthused the Prince to guide the Portuguese people's energies to the overseas, irreversibly transforming the destiny of the nation and changing the course of world history had been his religious faith and the desire to fight Islam and defend Christian civilisation.<sup>39</sup> In Bensaúde's perspective, the expansion to northern Africa, which happened only three years after the Hungarian defeat by the Turks, was related to the greater awareness of the Muslim threat to Europe. From this point of view, Ceuta, which was one of the major northern trade centres of the Islamic world, was invaded by the Portuguese in 1415 in order to prevent future attacks on the Iberian Peninsula and to weaken Muslim power.

According to Bensaúde, the plan of Henry the Navigator was vast, including also expeditions in the quest for the mythical Prester John's Christian Kingdom in Abyssinia (a potentially a strategic ally against Muslims) and the desire to reach India by rounding Africa. For Bensaúde, the purpose of these ambitious plans had never been taking control over lucrative trade routes for the sake of self-enrichment but rather destroying Islamic control over these routes and, subsequently, destroying Islamic influence and political power. In this sense, Bensaúde portrayed Prince Henry the Navigator as an ascetic dominated by a sincere religious enthusiasm, a 'superhuman energy' and resilience, sacrificing his own personal wealth to fund the maritime voyages and choosing an humble life retired near the sea in Sagres peninsula over life at Court. Prince Henry was thus a modern Percival, 'a knight of the Middle Ages, dominated by one principle: overturning the world in defence of Christianity and for the protection of threatened European civilisation'.<sup>40</sup> To be sure, Joaquim Bensaúde later conceded that

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<sup>39</sup> Bensaúde, Joaquim (1929), *Origines du Plan des Indes – Conférence*, op. cit, p. 29

<sup>40</sup> 'D. Henrique est un chevalier du Moyen Age, dominé par un idéal: le bouleversement du monde pour la défense de la Chrétienté et pour la protection de la civilisation européenne menacée. Sa vie est un autre roman de chevalerie de la plus superbe grandeur. Il écrit l'histoire de ses plans et de sa vie poussé par la réalité de ses indomptables aspirations ; malgré les murmures de la nation au début de son entreprise, malgré tous les malheurs qui accablent sa famille, il est dominé par une volonté, une énergie surhumaine. Rien n'a pu

Prince Henry the Navigator did not remain indifferent to material rewards of the overseas expansion. Yet, he persisted in the idea that Portuguese imperialism did not have an economic motivation: even Prince Henry's interest in obtaining information about gold mines in the Gulf of Guinea in West Africa and how to reach them by sea was justified with the need to gather resources to carry out his plan for expand the Christian faith. Gold was a means but never an end.<sup>41</sup>

At the origin of this slight variation in Bensaúde's later work were the criticisms of ignoring the economic dimension of the early Portuguese maritime adventure. One of the most vocal critics was Duarte Leite, with whom Joaquim Bensaúde kept a long dialogue.<sup>42</sup> Like Bensaúde, Duarte Leite had a background in natural sciences and turned to history writing later in his live. Graduated in Mathematics, he taught Geometry, Rational Mechanics, Astronomy, and Geodesy at Oporto Polytechnic Academy after his studies. Minister of Finances and Prime minister for brief periods after the establishment of the First Republic, Duarte Leite embarked on a diplomatic career as ambassador in Rio de Janeiro between 1914 and 1931. His first studies about the Discoveries Age date from this period, being focused on the History of Brazil. He got involved in a contemporary controversy about the 'discovery' of Brazil, using his deep knowledge about Astronomy and Geodesy to discredit ongoing claims that Spanish navigators had reached Brazil before the Portuguese. For Duarte Leite, these Spanish pretentions were predicated on 'the spirit of narrow and factious nationalism' of Spanish historians rather than on the pursuit of understanding of history, an attitude that he despised.<sup>43</sup> From Leite's view, Bensaúde's understanding of the origin of the maritime enterprise and Prince Henry the Navigator's role in the foundation of the

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arrêter ce rêve immense conçu dans les angoisses de la Chrétienté menacée' in, Bensaúde, Joaquim (1929), *Origines du Plan des Indes – Conférence*, pp. 31-32.

<sup>41</sup> Bensaúde, Joaquim (1942), 'As dificuldades financeiras dos descobrimentos do Infante' in Idem, *A Cruzada do Infante D. Henrique*, Lisbon, Agência Geral das Colónias, pp. 101-113.

<sup>42</sup> See Duarte Leite's reaction to Bensaúde's aforementioned Seville conference paper, Leite, Duarte (1930), 'Talent de Bien Faire. A propósito da Conferência de Joaquim Bensaúde - Origines du plan des Indes', *Revista Portuguesa*, tomo 1, fasc. 2. Reprinted in Magalhães Godinho (ed.) (1958), *Duarte Leite. Descobrimientos Portugueses: colectânea de esparsos*, Lisbon, Cosmos.

<sup>43</sup> Leite, Duarte (1943), *Os Falsos precursores de Alvares Cabral*, Lisbon, Portugália, p. 9. [revised and augmented second edition]

empire had the same root than the work of these censurable Spanish historians. He offered an alternative (and more prosaic) reading of the onset of the Portuguese colonial venture, underlining social, political, and especially economic factors that had been ignored in his colleague's univocal reading of the historical facts.

According to Duarte Leite, religion was only a minor dimension to be taken into account, being an additional benefit from the overseas expansionism rather than its central drive. Portuguese expansion in North of Africa was not a crusade against the Islamic world but a well thought and articulated strategy to redirect the nobility's military enthusiasm and material ambitions from the Iberian territory and, simultaneously, to satisfy bourgeoisie's aspirations.<sup>44</sup> Also, the search for Prester John's kingdom – Duarte Leite argued – was not an aim in itself but rather an excuse used at the time to justify expeditions with hidden commercial interests in order to get the Pope's imprimatur for engaging in such a materialistic venture.<sup>45</sup> Instead of a medieval knight obsessed with religion, Prince Henry was endowed with an unusual administrative aptitude and an extraordinary commercial intuition. The Portuguese empire was thus born from the search for revenue, being managed to be a lucrative enterprise.

The importance of economic motivations as a motor for the maritime expansion was also highlighted by Jaime Cortesão. Notwithstanding recognising the importance of spiritual inspiration in the genesis of Portuguese expansionism,<sup>46</sup> Cortesão explained the Conquest of Ceuta in 1415 as a result of the need to suppress the Muslim piracy in the Strait of Gibraltar and the surrounding areas. Due to Portugal's geographical position and consequent isolation from the rest of Europe, its economy relied on maritime routes in the Mediterranean Sea. As a consequence, the intensification of piracy in the Strait of Gibraltar caused eastern products to arrive in smaller quantities and more expensive,

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<sup>44</sup> Leite, Duarte, 'Talent de Bien Faire' in Magalhães Godinho (ed.) (1958), *Duarte Leite. Descobrimientos Portugueses: colectânea de esparsos*, op. cit, p. 70.

<sup>45</sup> Leite, Duarte, 'Talent de Bien Faire' in Magalhães Godinho (ed.) (1958), *Descobrimientos Portugueses*, p. 73.

<sup>46</sup> He would later published an article on the role of the mysticism of Franciscan order in the creation of a mentality propitious to colonial expansion. Cortesão, Jaime (1932), 'O franciscanismo e a mística dos Descobrimientos', *Seara Nova*, 301 (2<sup>nd</sup> June 1932), pp. 198-204.

also depriving the Portuguese state from customs duties (i.e. one of its most important sources of revenue).<sup>47</sup> Another significant writer of history who questioned the idea of Portuguese expansionism as a crusade motivated by Prince Henry's religious faith was Alberto Veiga Simões, a lawyer by training and a diplomat by profession. The title of the paper he presented at the First Congress of the History of Portuguese Expansion in the World in 1938 – 'Portugal, Gold, the Discoveries, and the creation of the Capitalist State' – leaves no doubt about his views on the importance of the profit aim on the genesis of the Portuguese maritime enterprise.<sup>48</sup> On the previous year, he had already stressed the importance of social classes and economic factors, questioning the 'individualising logic' of an approach centred on great national heroes that isolated Prince Henry the Navigator from his context:

Attributing our action in the Discoveries and conquests to the *crusading spirit* of the Prince is a personifying the action of a People in a posthumous soldier of Faith. In this way, everything would have been the result of the mysticism of a man who was blindly followed by his country. Actually, the country counted for something. The action of the Prince could take place because it was a national action; it encompassed the different class interests (...).<sup>49</sup>

Perspectives that emphasised social and economic grounds for the onset of the Portuguese maritime expansion and narratives that stressed its religious motivations were not equally valued. In the so-called 'controversy between spiritualists and

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<sup>47</sup> Cortesão, Jaime (1925b), 'Africa Nostra. II. A tomada e Ocupação de Ceuta', *Boletim Geral das Colónias*, n. 5 (November 1925), pp. 7-30.

<sup>48</sup> Simões, Alberto Veiga (1938), 'Portugal, o Ouro, as descobertas e a criação do Estado capitalista' in *I Congresso de história da expansão portuguesa no mundo, 5.ª Secção, Estudos Gerais*, Lisbon, Ministério das Colónias, vol. 2, pp. 231-277

<sup>49</sup> 'Atribuir a nossa acção nas conquistas e descobertas ao *espírito de cruzado* do Infante seria personalizar num póstumo soldado da fé a actividade dum povo. A ser assim, tudo seria obra do misticismo dum homem que o seu país cegamente seguia. Ora o país contava para alguma coisa. A acção do Infante pôde mesmo realizar-se – porque era nacional, e englobava afinal em si os interesses dispares das classes, da que representava a riqueza imóvel da terra e das que detinham a riqueza móvel do dinheiro e do tráfico'. Simões, Alberto Veiga (1937), 'O infante D. Henrique, o seu Tempo e a sua Acção' in António Baião, Hernâni Cidade e Manuel Múrias (eds.), *História da Expansão. Portuguesa no Mundo*, Lisbon, Ática, vol. I, ch. VIII, p. 337

materialists',<sup>50</sup> authors did not have the same facilities to get their message across. Veiga Simões, who had also been a political actor engaged with the First Republic, exiled in Paris after being abruptly removed from his position as consul in Berlin in 1940.<sup>51</sup> Also Jaime Cortesão watched the debate from the outside. Due to his involvement in an attempted coup d'état to overthrow the dictatorship in 1927, he spent the next 30 years in exile. Cortesão was disdained as 'unpatriotic', which influenced the reception of his writings on the early Portuguese expansion.<sup>52</sup> Also Duarte Leite's writings were derided by the intellectuals connected to the propaganda apparatus as examples of a Republican 'decadent mentality' that belittle Portuguese greatness.<sup>53</sup> While Leite's historical reflections were mainly published as short essays in mainstream press and cultural magazines, a new and extended version of Bensaúde's 1930 laudatory study on Prince Henry the Navigator and his religious faith was published by the official colonial propaganda agency in 1942.<sup>54</sup> Moreover, Joaquim Bensaúde was nominated by the ministry of Education as founding member of the Portuguese Academy of History, taking part on the construction of the 'historical truth for the national interest' to which this institution was intended. Bensaúde did not invent the myth of the uneconomic nature of Portuguese empire and its religious starting point but

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<sup>50</sup> The contemporary expression is from Silva, Marinho da (1942), *O Sentido do Imperialismo Português*, Lisbon, Agência Geral das Colónias, vol. 1, p. 32.

<sup>51</sup> His 'sympathy for the causes of the so-called democracies' – to use the expression employed in a political police report – motivated his replacement with Francisco Nobre Guedes, known for his admiration for the German regime. ANTT, AOS, CO, IN, 8B, pt.2, Informações da PVDE-Polícia de Vigilância e Defesa do Estado, Informação: Veiga Simões – 8th May 1941, p. 112. On Veiga Simões, see Madeira, Lina Alves (2000), *Alberto da Veiga Simões: Esboço Biográfico*, Coimbra, Quarteto Editora.

<sup>52</sup> See, for instance, Silva, Marinho da (1942), *O Sentido do Imperialismo Português*, Lisbon, Agência Geral das Colónias, vol. I (Biblioteca Pelo Império 85), p. 30. On Jaime Cortesão, see Travessa, Elisa Neves (2004), *Jaime Cortesão. Política, história e cidadania (1884-1940)*, Lisbon, Asa.

<sup>53</sup> See, for instance, Alfredo Pimenta, 'O Infante D. Henrique e o Prof. Duarte Leite' in *Acção*, 20, 4th September 1941, p. 7 or Costa Brochado in 'Resposta de Costa Brochado ao Dr. Duarte Leite', *Seara Nova*, 883 (15th July 1944), pp. 176-179.

<sup>54</sup> Bensaúde, Joaquim (1942), *A Cruzada do Infante D. Henrique*, Lisbon, Agência Geral das Colónias. It would be reprinted by this official institution in 1959 and 1960 on the occasion of the commemoration of the fifth centenary of the Prince Henry the Navigator's death.

his writings and the recognition he achieved as an academic provided an authoritative scientific base for its consolidation.

Outside the debate within intellectual circles, the idea that the spirit of Crusade had been the trigger for the Discoveries was the most common – if not the only – version common people encountered to think about their country's imperial past. Competing accounts were absent from the explanation disseminated in public schools. In 1932, the decree that regulated History textbooks for the secondary education clearly defined that Faith should be promoted as the 'impetus of the Portuguese expansion by seas and continents'; textbooks that did not meet this requirement were not authorised by the ministry of Education.<sup>55</sup> Control over the teaching of History tightened in 1936 with the introduction of a single, standardised book to be used in every secondary school.<sup>56</sup> Moreover, the conception of the past available in literature on the onset of the empire with a non-scholarly readership in mind was no different from the one that ordinary people had encountered back in their school days.<sup>57</sup> The trope of the spirit of crusade appeared on mainstream press on occasional references to the foundation of the empire as well, being reproduced in either small colonial propaganda periodicals owned by African intellectuals settled in Lisbon such as *Humanidade*<sup>58</sup> or in widespread newspapers linked to economic groups such as *O Século*.

On a special issue dedicated to the Empire published on the occasion of the commemorations of the Foundation and Restoration of Portugal in 1940, readers of *O*

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<sup>55</sup> Decree n. 21.103, art. 3, *Diário do Governo*, 15<sup>th</sup> April 1932.

<sup>56</sup> Law 1941, *Diário do Governo*, 11<sup>th</sup> April 1936. Later that year, the 'single book' policy was extended to primary school. See Proença, Maria Cândida (2000), 'A escola e os Descobrimentos' in Maria Cândida Proença, Luís Vidigal and Fernando Costa (eds.), *Os Descobrimentos no Imaginário Juvenil (1850-1950)*, Lisbon, Comissão Nacional para as Comemorações dos Descobrimentos Portugueses, pp. 13-79.

<sup>57</sup> See, for instance, Costa Brochado's acclaimed and widely circulated biography of Henry the Navigator, which was awarded the National Propaganda Office's prize for historical studies in 1942. Brochado, Idalino Costa (1942), *Infante D. Henrique*, Lisbon, Editorial Império. On Costa Brochado's role as a 'cultural employee' in the service of *Estado Novo*, see Torgal, Luís Reis (2009), 'Intelectuais, intelectuais orgânicos e funcionários culturais no Estado Novo' in Idem, *Estados Novos, Estado Novo*, Coimbra, Imprensa da Universidade de Coimbra, vol. II, chap. 3, pp. 71- 117.

<sup>58</sup> See *Humanidade*, 30 (5<sup>th</sup> September 1937), p. 24. 'A descoberta e a conquista foram até consideradas primeiramente como uma cruzada.' [The Discovery and conquest were primarily considered a crusade.]

*Século* were recalled of the ‘religious mysticism’ of the Portuguese rulers at the helm of the expansionist project: the maritime expansion – it could be read – was ‘the most beautiful crusade of the Western world’, carrying on the national vocation that had been initiated with the conquest of the metropolitan territory from the Islamic peoples settled in the Iberian peninsula.<sup>59</sup> The emphasis on the continuity of the national mission was in fact similar to the one that could be found in official propaganda vehicles. Turning to the Atlantic Ocean after concluding the *Reconquista* at home was understood as the obvious step for ‘pursuing the path chosen from the first hour of Portuguese expansion to dilate the Faith and the empire beyond the borders of the County of Portugal’.<sup>60</sup> What was stressed here was that Christianity and the desire to expand it were part of the essence of Portugal, being a formative element of the national soul even before the birth of the Nation. The religious zeal, without which Prince Henry the Navigator and his collaborators would have given up due to the ‘meagre material results’ derived from the early discoveries,<sup>61</sup> was present on the historical and ‘genetic’ legacy of the nation. It was what made the Portuguese *naturally* prone to a colonial venture, giving them the courage to start an unprecedented adventure.

Defining what had been at the origin of the maritime expansion in the fifteenth century was a crucial element of distinction of the Portuguese empire in the twentieth century vis-à-vis other European empires. Portugal stood out not only for creating a colonial empire before any other European country but also for doing it for different reasons. Undoubtedly, different meant better: the reasons of the Portuguese were anchored on honourable values rather than cupidity, reflecting national superiority on moral grounds. The invocation of the glorious past had, thus, a multiple function. The first – and more obvious – was to mould and stimulate a collective sense of identity and

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<sup>59</sup> O Século. Suplemento dedicado ao Império Colonial Português e às comemorações, nas Províncias Ultramarinas, dos Centenários da Fundação e da Restauração de Portugal, 1940, p. 9 and p. 11.

<sup>60</sup> ‘no prosseguimento do caminho traçado, desde a primeira hora da expansão dos portugueses com fim a dilatar a fé e o império para além das fronteiras do Condado Portucalense’ Silva, Marinho da (1942), *O Sentido do Imperialismo Português*, Lisbon, Agência Geral das Colónias, vol. 1, p. 30.

<sup>61</sup> Silva, Marinho da (1942), *O Sentido do Imperialismo Português*, Lisbon, Agência Geral das Colónias, vol. 1, p. 36.

pride around a common past in which the nation assumed a privileged and universally valorised role.

Second, narratives on the glorious past also entail models of behaviour to be replicated by the contemporaries. The selection of versions of historical events and national heroes to be included in the 'right' national memory is a political choice, reflecting the set of virtues that are considered properly national and, therefore, suitable for emulation. In Portugal, navigators and early explorers were celebrated as *exempla virtutis* of the nation, to use the designation Anthony D. Smith borrowed from Art History.<sup>62</sup> None exemplified such virtues with greater authority than Prince Henry the Navigator, who was celebrated not only by his actions but also by his personality as a national leader. Although Prince Henry's presence in national iconography transcended political regimes, his virtues were redrawn in accordance with the current political and cultural needs. The narrative on the spirit of Crusade as Prince Henry's motivation for overseas expansion endorsed by *Estado Novo's* political elites was also a story of a people who submitted to the will of a devout and wise chief, a reserved man who sacrificed his personal life for the sake of the nation, forgoing a quiet occupation and remaining single in order to direct all his energies for the creation of a greater Portugal. In other words, it was a story of a people that entrusted its fate to a man like Oliveira Salazar. The supposed similarities between the two national leaders were observed in a rather explicit way during the First Congress of History of Portuguese Expansion. The Count of Campo Belo, Henrique Távora e Cernache, who would later be admitted as honorary member of the Portuguese Academy of History, concluded his paper on the 'Portuguese mentality' during the Discoveries by stressing the parallels between the two men:

Both were characterised by a very lucid, insightful, and tenacious spirit that totally prevailed over any emotional reaction, which subsequently was always subordinated to the principle of reason. The undisturbed serenity, which was common to both, derived from this; at first glance it might seem a reduced flexibility or pitiless crudity of feeling but it is simply the anteposition of

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<sup>62</sup> Smith, Anthony D. (1998), *Nationalism and Modernism. A critical survey of recent theories of nations and nationalism*, London and New York, Routledge, p. 42. See also Rosenblum, Robert (1967), *Transformations in Late Eighteenth Century Art*, Princeton, Princeton University Press, ch. 2.

superior interests to personal or emotional concerns. (...) Both were intellectuals, preparing themselves in advance for their functions through careful and detailed studies: one, by learning the trajectories of planets and the secrets of distant lands and oceans from famous astronomers, sailors and pilgrims; the other, by seeking knowledge at the glorious University of Coimbra, where he received his doctorate, and cultivating the wisdom of his speciality in enduring, repeated and fruitful visits to the Ministry of Finance and its departments.(...) Foremost, they are both devotees, both structurally religious, integrating themselves with an apostolic devotion in the role of conductors of the Lusitanian people.<sup>63</sup>

Having the specific set of virtues that led Prince Henry to initiate the Portuguese Golden Age, Salazar's charismatic authority – in Max Weber's terms –<sup>64</sup> was reinforced. This brings us to the third political function of the myth of the Crusade spirit: the invocation of historical continuity lent additional legitimacy and gravity to the present. The mobilisation of this particular version of the past was not only an exercise of legitimisation of Salazar's suitability for ruling the Portuguese and guiding them for a

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<sup>63</sup> 'Ambos se caracterizam por espíritos lucidíssimos, penetrantes e tenazes, que venceram totalmente quaisquer reacções emotivas, as quais por conseguinte serao sempre subordinadas aos ditames do raciocínio. Daí a imperturbável serenidade comum aos dois, à primeira vista minguada impressuabilidade ou impediçosa crueza do sentir, mas em verdade simples anteposição de interesses superiores a preocupações de índole pessoal ou afectiva. (...) Insensibilidade aparente, no fundo domínio completo sobre si mesmo, que os levou à renúncia do aconchego do lar para inteiramente se votarem à gerência dos negócios do Estado. Ambos sábios, preparam-se com antecedência por estudos aturados e minuciosos, para as funções que foram chamados a desempenhar, um aprendendo junto de afamados astrónomos, mareantes e peregrinadores, as trajectórias dos planetas e os segredos de terras e oceanos longínquos, o outro indo buscar a ciência à gloriosa Universidade coimbrã, conquistando nela o capelo de mestre e cultivando depois o complicado saber da sua especialidade em pacientes, repetidas e frutíferas visitas ao Ministério e às repartições de Finanças. (...) Melhor: ambos crentes, estruturalmente religiosos, integram-se com devoção de apóstolos no papel de condutores do povo lusitano; sacerdotes da Pátria, quase se podem considerar também missionários de Deus!' Távora e Cernache, Henrique (1937), *A mentalidade imperial através da expansão portuguesa no mundo*, Lisbon, Ministério das Colónias (offprint of Primeiro Congresso da História da Expansão Portuguesa no Mundo), pp. 18-19.

<sup>64</sup> Charismatic authority rests on the recognition of 'a certain quality of an individual personality by virtue of which he is considered extraordinary and treated as endowed with supernatural, superhuman, or at least specifically exceptional powers or qualities'. Weber, Max (1978 [1922]), 'Charismatic Authority and Charismatic Community' in Idem, *Economy and Society. An Outline of Interpretative Sociology*, Berkeley – Los Angeles – London, University of California Press, p. 241

new Golden Age; it was also an exercise of legitimation of Salazar's restricted policies when it came to the economics of the empire, a keystone for the establishment and consolidation of the new political regime.

### **5.1.2. Beyond Profit: Nationalism, Solidarity, and Imperial Economic Unity**

Tackling economic problems in the colonies had become a political priority on the eve of *Estado Novo*. The state of economic affairs in the two most important Portuguese colonies in Africa was ruinous due to an array of converging factors mentioned in previous chapters. At the turn of the 1930s, metropolitan economic gains derived from the colonies were minimal:<sup>65</sup> the metropole was saddled with the consequences of budget mismanagement during the High Commissioner system and the contraction of markets that affected the exports of raw materials on which colonial economies were based. The balance between costs and profits of the empire was progressively more problematic. How much was the nation giving and taking from its empire and how much should it give or take in the future? How valuable was the empire for the nation? Did colonialism pay? Fears that the colonies were taking too much from the metropole and Angola and Mozambique would drag the already deficient metropolitan economy down, hindering its chances for recovery in the future, grew in Portugal. Despite not being affected by the Wall Street Crash of 1929 in a direct way because of the lack of internationalisation and its almost nonexistence exposure to the

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<sup>65</sup> Rosas, Fernando (1996), *O Estado Novo nos Anos Trinta, 1928-1938. Elementos para o estudo da natureza económica e social do Salazarismo*, Lisbon, Editorial Estampa, pp. 78-92.

collapse of the international banking system, the metropole was experiencing an economic crisis as well.<sup>66</sup>

Amongst the most influential models for the national crisis resolution, Quirino de Jesus and Ezequiel de Campos's thought stood out. At the heart of their seminal volume on the Portuguese economic crisis and the solutions for Portugal's regeneration was the imperative of national budget control – the 'financial restoration', to use the expression later popularised during *Estado Novo*.<sup>67</sup> Quirino de Jesus and Ezequiel de Campos's discourse on the reconstruction of Portugal was centred on contained metropolitan betterments in selected key fields such as agriculture, electrification, and infrastructures like as roads and ports, paying no attention to colonial development. For Quirino de Jesus and Ezequiel de Campos, who were both powerful references for the formation of Salazar's thought and later his mentors,<sup>68</sup> the empire was at the origin of metropolitan underdevelopment. Quirino de Jesus's imaginative exercise in the pages of *Seara Nova* in January 1926, which is worth quoting in length, clearly shows his view:

Let's suppose that Portugal did not have [colonial] domains. Let's imagine that [Portugal] had dedicated to its rural development, to its road traffic and merchant marine, to its ports, to the creation of electric power and to its industry, the resources and credits that, since 1850, had to be employed in a different way because [Portugal] is a colonial power. Undoubtedly, if that had been possible, Portugal would have had much better material results than the ones it got from its possessions in three quarters of a century; for that reason, it would have higher population and wealth. We [the Portuguese] have many

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<sup>66</sup> Rosas, Fernando (1987), 'A crise de 1929 e os seus efeitos económicos na sociedade portuguesa' in in *O Estado Novo. Das origens ao fim da autarcia, 1926- 1959*, Lisbon, Fragmentos, vol. I, pp. 258-274. See also Rosas, Fernando (1986), *O Estado Novo nos Anos Trinta, 1928-1938*, Lisbon, Editorial Estampa.

<sup>67</sup> Jesus, Quirino de and Ezequiel de Campos (1923), *A crise portuguesa: subsídios para a política de reorganização nacional*, Porto, Industrial Gráfica do Porto.

<sup>68</sup> On Quirino de Jesus and Ezequiel de Campos's thought on economic development and its importance in the first decades of *Estado Novo*, see Rosas, Fernando (1988), 'As ideias sobre desenvolvimento económico nos anos 30: Quirino de Jesus e Ezequiel de Campos' in AAVV, *Contribuições para a História do Pensamento Económico em Portugal*, Lisbon, Publicações D. Quixote, pp. 185-208.

demographic and economic limitations in the [Iberian] Peninsula as a consequence of our overseas empire.<sup>69</sup>

While for Quirino de Jesus Portuguese demographic and economic limitations were a consequence of the possession of colonies, in international circles they were perceived as the cause for Portugal's unsuitability to possess colonies, as we have seen on chapter 2. Due to the lack of people and capital, Portugal was deemed unable to develop its empire. The rhetoric of economic development of the colonies began to take shape in the quest for new and more effective models of imperial instrumentalisation in the aftermath of the First World War. Distinct from the concept of development that would prevailed after the Second World War, colonial development at this stage was mainly used to describe investment in the colonies for the purpose of producing proceeds to colonial powers' interests.<sup>70</sup> Works of eminent colonialists and actors in the political sphere such as Lugard's *The Dual Mandate in British Tropical Africa* and Sarraut's *La mise en valeur des colonies françaises* were part of this new trend in the early 1920s.<sup>71</sup> Both Lugard and Sarraut advocated the investment in colonial infrastructures: despite some differences, namely on the degree of acceptable western intervention in the 'backward' societies, both authors defended that modernising the colonial territories was a necessary measure for ensuring the profitability and continuity of the British and French empires, respectively.

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<sup>69</sup> 'Suponhamos que Portugal não possuía domínios. Figuremos que (...) tinha consagrado ao seu fomento rural, à sua viação e marinha mercante, aos seus portos, e por fim à criação de energia eléctrica e à sua indústria, os recursos e os créditos que teve que empregar de outra maneira, desde 1850, por ser uma potência colonial. Sem dúvida alguma, se isto fosse possível, Portugal haveria tido resultados materiais muito superiores aos que tirou das suas possessões em três quartos de século, sendo já muito maior a sua população e riqueza. Temos muito mais limitadas condições demográficas e económicas na Península, por causa do nosso império ultramarino.' Jesus, Quirino de (1926), 'As ambições estranhas. Portugal e as colónias', *Seara Nova*, 9<sup>th</sup> January 1926, pp. 154-161

<sup>70</sup> For a short account on the post- Second World War concept of development and their role in the discourse on colonial modernisation, see Cooper, Frederick (1997), 'Modernizing Bureaucrats, Backward Africans and the Development Concept', in Frederick Cooper And Randal Packard (eds.), *International Development and the Social Sciences Essay in the history and Politics of knowledge*, Berkeley, University of California Press, ch. 2, pp. 64-92.

<sup>71</sup> Lugard, Frederick (1922), *The Dual Mandate in British Tropical Africa*, London and Edinburgh, William Blackwood and Sons; Sarraut, Albert (1923), *La mise en valeur des colonies françaises*, Paris, Payot

Hence the debate on colonial economics in Portugal was shaped by two opposing lines of argument: on the one hand, the need to refrain the costs of the empire in order to ‘save’ metropolitan finances and focus on the development of the metropole; on the other hand, the need to increase the investment in the colonies in order to make them more profitable and strengthen Portuguese presence, not only effectively but also at the eyes of foreign critics. Salazar’s option for the former, which was consolidated with the promulgation of Colonial Act in 1930, did not go without criticism.

Disapproving voices could be read, for instance, on the pages of *Vida Contemporânea*, a short-lived periodical owned and directed by Cunha Leal, the former director of Bank of Angola whose public condemnation of Salazar’s policies in the Ministry of Finances had been at the origin of the governmental crisis that ended with Salazar’s nomination as Minister of Colonies in 1930. An inflamed article authored by Albano Moncada, also a very critical voice against Salazar’s policies for Africa and their impact in Angola,<sup>72</sup> and published shortly before *Vida Contemporânea* was discontinued due to the increasingly tight control of censorship, epitomises the vision on the ‘obligations’ of colonising nations’ financial sacrifices in order to conduct colonies to Progress:<sup>73</sup>

Great financial sacrifices have been made by Portugal in favour of the economic development of their colonies. The need of a progressive action of colonial development imposes even greater sacrifices in the future. But, of course, the costs of colonial settlement, agricultural development, manufacturing, etc., do not fit in the budgetary resources of the forming countries.<sup>74</sup>

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<sup>72</sup> See Moncada, Albano (1930), *O Banco de Angola, Eu e o Sr. Oliveira Salazar*, Lisbon, author’s edition.

<sup>73</sup> On Cunha Leal and his *Vida Contemporânea*, see Silva, Júlio Rodrigues (2009), ‘Cunha Leal e a *Vida Contemporânea* (1934-1936)’, *Estudos do Século XX*, 9, pp. 251-265

<sup>74</sup> ‘Grandes têm sido os sacrificios financeiros feitos por Portugal em favour do desenvolvimento económico das suas colónias. Maiores ainda nos impõe, de futuro, a imperiosa necessidade duma acção progressiva do fomento colonial. Mas evidentemente as despesas de povoamento colonizador, fomento agrícola, indústria transformadora, etc, não cabem dentro dos recursos orçamentais de países em formação. Temos cumprido com os deveres de nação colonizadora, mas a nossa acção tem sido desordenada. Faltas de recursos em ocasiões oportunas tem concorrido para essa desorientação. É, porém, absolutamente

According to Moncada, the financial sacrifices were not in vain, though. He argued that the Portuguese had to think of the capital invested in the development of the Colonial Empire as an investment for their own advantage and, therefore, it should be considered as ‘necessary expenses and not paid loans in charge of the colonies’.<sup>75</sup> Moncada’s argument was twofold: first, metropolitan obligations to support the costs of the colonies’ economic development were a necessary self-investment for the future of national economy; second, by limiting investment in the modernisation of the colonies, the government was failing in its civilising mission of using its economic and technic superiority to rescue the dominated territories from backwardness and lead them to Progress.

Yet, this view was not exclusive to detractors of the regime. In congresses and conferences on colonial economics the urgency of investing in the colonies to make them more profitable was the only aspects that obtained unanimous support: during the First Congress of Trade with the Colonies, in 1934, or the First Economic Conference of the Portuguese Colonial Empire, in 1936, the need to spend more was not question, even though many points of view on the priorities and strategies of investment to be adopted coexisted.<sup>76</sup> Similarly, the discourse on the need for investment could be found also in the colonial propaganda agency’s publications.

In *O Mundo Português*, Américo Chaves de Almeida, a conservative colonial writer and regular contributor to this periodical, pompously compared the opponents of the public investment in the colonies the Old Man of Restelo, *Os Lusíadas*’s character who appeared on the bank of the Tagus river from where the first expedition to India departed to ask Vasco da Gama and his crew to abort the project of sailing to India since it would attract disasters to the kingdom and its people. In Chaves de Almeida view, the modern ‘old men of Restelo’, who saw the colonies as mere ‘land of niggers’, were responsible for creating ‘difficulties for the achievement of the great national policy’

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preciso que se ponha ordem em assunto de tanta monta.’ Moncada, Albano (1935), ‘Portugal e os seus encargos coloniais’, *Vida Contemporânea*, 20 (December 1925), p. 874.

<sup>75</sup> Moncada, Albano (1935), ‘Portugal e os seus encargos coloniais’, *Vida Contemporânea*, 20 (December 1935), p. 874.

<sup>76</sup> See AAVV (1934), *Primeiro Congresso do Intercâmbio Comercial com as Colónias*, Porto, Imprensa moderna and AAVV (1936), *Primeira Conferência Económica do Império Colonial Português, Pareceres, projectos de decreto e votos*, Lisbon, Ministério das Colónias (2 volumes)

that would led to ‘less poverty, less troublesome, less bitterness, [and] more welfare, more comfort, and greater wealth to Portugal’.<sup>77</sup>

*Estado Novo*’s official rethoric in the 1930s went into a different direction, though. The official discourse gave an uneconomic formulation to the motives and outcomes of policies that were essentially economic. In the words of Minister of Colonies Vieira Machado in 1936, *Estado Novo*’s imperial policies were all about ‘Unity, Solidarity, and Nationalism’. By making use of abstract notions such as ‘spiritual and economic policy of solidarity’ and ‘a perfect sense of the unity of the Empire’ connected to ‘our historic destiny’, the minister naturalised an alleged harmony between the metropole and the colonies.<sup>78</sup> At the origin of Salazar’s colonial economic policy stood an organicist and hierarchical conception of empire in which metropole and colonies had different functions in the national ‘whole’, being the latter subservient to the former. This hierarchy structured not only administration but also economy. As explicitly stated in the provisions of Colonial Act in 1930, the metropolitan economy and the colonies’ economies had a common basis: they constituted a ‘natural community and solidarity’ stemming from ‘moral and political ties’ between them.<sup>79</sup> Colonial economy had to be established not only ‘in harmony with the necessities of their development and fair reciprocity between them and their neighbour countries’ but also in agreement with ‘the rights and legitimate conveniences of the metropole and the Portuguese empire.’<sup>80</sup>

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<sup>77</sup> See Chaves de Almeida, Américo (1934), ‘Os Velhos do Restelo’ in *O Mundo Português*, 3, pp. 107-108.

<sup>78</sup> ‘O Estado Novo teve o génio de criar uma nova Política Imperial, definida sucessivamente no Acto Colonial, na Constituição Política, na Carta Orgânica. Pode sintetizar-se esta política numa simples frase: *Unidade, Solidariedade e Nacionalismo*. *Unidade* verdadeira correspondendo a uma política espiritual e económica de solidariedade entre a metropole e as colónias; *solidariedade* efectiva, correspondendo a um sentido perfeito da unidade do Império para a compreensão dos nossos destinos históricos.’ *A Voz*, 7<sup>th</sup> June 1936, p. 1.

<sup>79</sup> ‘Artigo 34<sup>o</sup>: A metrópole e as colónias, pelos seus laços morais e políticos, têm na base da sua economia uma comunidade e solidariedade natural, que a lei reconhece.’ Colonial Act, Decree 18.571, *Diário do Governo*, 8<sup>th</sup> July 1930.

<sup>80</sup> Artigo 35<sup>o</sup>: Os regimes económicos das colónias são estabelecidos em harmonia com as necessidades do seu desenvolvimento, com a justa reciprocidade entre elas e os países vizinhos e com os direitos e legítimas conveniências da metrópole e do Império Colonial Português. Colonial Act, Decree 18.571, *Diário do Governo*, 8<sup>th</sup> July 1930.

This idea of the Portuguese empire as a balanced unit was essential to the discursive construction of difference and hierarchy between colonisers. As Marcelo Caetano claimed in his propagandistic short essay about the traditions, principles, and methods of the Portuguese colonisation published by the colonial propaganda agency in 1951, the Portuguese had never adopted a ‘broken-down “colonial pact”, which made the Metropolis the exclusive beneficiary of colonial utilities’.<sup>81</sup> This sort of colonial pact was the strategy of the other European colonial powers, which were focused on the exploitation of their colonial dominions. On the contrary, the Portuguese had pursued a ‘policy of inter-territorial coordination with division of labour and internal protection’.<sup>82</sup>

To be sure, Colonial Act was predicated on the desire to make colonialism pay better and to promote the emergence of the empire as a self-sufficient economic entity. Decisions on what were the necessities of the colonies’ development and the conveniences of the metropole and the Portuguese empire were reserved to the metropole, making the ‘policy of inter-territorial coordination’ mentioned by Marcelo Caetano an unbalanced.<sup>83</sup> Therefore, it was not different from contemporary imperial economic thinking and economic policies in Britain or France in their aims.<sup>84</sup> Yet, there were differences in some – but not all – strategies adopted by other colonial powers to achieve them, mainly due to the economic fragility of the Portuguese metropole. Instead of being seen as a limitation, this weakness was transmuted into strength in nationalist rhetoric during the 1930s and 1940s.

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<sup>81</sup> Caetano, Marcelo (1951), *Colonizing Traditions, Principles, and Methods of the Portuguese*, Lisbon, Agência Geral do Ultramar, pp. 38

<sup>82</sup> Caetano, Marcelo (1951), *Colonizing Traditions, Principles, and Methods of the Portuguese*, op. cit., pp. 38-39.

<sup>83</sup> Artigo 36º: Pertence à metrópole, sem prejuízo da descentralização garantida, assegurar pelas suas decisões a conveniente posição dos interesses que, nos termos do artigo anterior, devem ser considerados em conjunto nos regimes económicos das colónias’. Colonial Act, Decree 18.571, *Diário do Governo*, 8<sup>th</sup> July 1930.

<sup>84</sup> See, for instance, Tomlinson, Jim (2012), ‘Empire/Commonwealth in British Economic Thinking and Policy’ in Thompson, Andrew (ed.), *Britain’s Experience of Empire in the Twentieth Century*, Oxford, Oxford University Press, ch. 6, pp. 211-249; Saul, Samir (2009), ‘Milieux d’affaires de l’Outre-Mer français et Grande Dépression des années 1930’, in *French Colonial History*, 10, pp. 209-243; Saul, Samir (2011), ‘Les pouvoirs publics métropolitains face à la Dépression: La Conférence économique de la France métropolitaine et d’Outre-Mer (1934-1935)’, *French Colonial History*, 12, pp. 167-191.

In spite of the fact that development and exploitation were admittedly part of the national colonial project and the future of the Portuguese nation, a strong disdain for economic fomentation based on metropolitan aid to the colonies can be found in the speeches of Salazar and his ministers of Colonies. Economic fomentation was deconstructed as a false help, aiming to better exploit instead of develop colonial possessions. Political actors, as well as the regime's propaganda apparatus, conveyed the idea that colonial issues in Portugal had little to do with a profitable exploitation or with any other economic benefits that could be collected by the metropole. The Portuguese colonial project was different. The argument was that the Portuguese empire was mainly about carrying on the historical mission of the nation while ensuring its geopolitical status as a colonial power. In short, *Estado Novo's* colonial policies that limited metropolitan investment in the colonies were just a continuation of the centuries-old Portuguese imperial path in which the extraction of wealth was secondary. The distinction between Portuguese and foreign methods of colonisation was thus rooted in the coloniser's character rather than in its available capital.

Vieira Machado concluded his speech at the inaugural ceremony of the First Economic Conference of the Portuguese Colonial Empire, in 1936, by making a clear distinction between foreign 'capitalist methods of colonisation' and the methods of colonisation in accordance with the Portuguese tradition: although the colonies 'were inundated with capital' in the former, only in the latter the coloniser was concerned with the colonial territories' benefits.<sup>85</sup> In a similar vein, his predecessor, Armindo Monteiro, had also countered the Portuguese moderation with the effects of easy credit for development projects in other European powers' colonies during the inaugural ceremony of the Conference of Colonial Governors held in Lisbon in June 1933. In his analysis of the consequences of different colonising methods after the 1929 Crash, the comparison was obviously favourable to Portugal: when copious capital was made available, colonial territories had often being victims of ambitious companies; those had been the only profiteers, leaving behind a 'painful sight' of 'new countries filled with ruins' since, even when the works were completed, their borrowing costs were higher

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<sup>85</sup> AAVV (1936), *Primeira Conferência Económica do Império Colonial Português*, Lisbon, Agência Geral das Colónias, p. 62.

than the income they generated.<sup>86</sup> Capital-oriented colonising methods were, Armindo Monteiro argued, damaging not only for the colonial economies themselves but also for the nation as a whole, since the metropole – the head of empire – would be forced to intervene, subsequently weakening the empire.

The trope of Portugal as an imperial nation but not an imperialist one – neither on the geopolitical sense of the term (used almost interchangeably with expansionist) nor on its economic one (which suggested an association with capitalist exploitation) – was widespread. References to a non-imperialist Empire and Portuguese uneconomic imperialism were not exclusive to political actors, being also reproduced in the mainstream press. A good example could be found in an editorial article in daily *O Comércio do Porto*. In contradistinction with the ‘moral and political purposes’ that acted as guidelines for the organisation of the Portuguese imperial economy, Britain’s ‘economic imperialism’ and the merely economic nature of the British Empire’s bonds were openly criticised:

Indeed, when studying closely the British imperial conferences – which are pure and typical manifestations of a colonial policy in which all processes, every doctrine, and all actions have been subordinated to higher economic demands – one is immediately surprised by the ease with which political reason are overridden by the economic reason. It is not our case, neither can it be our system. (...) The British Empire is a purely economic empire. Only in this way it is a strong, real unit. The Portuguese empire is (...) an united empire in economic, moral, spiritual, and political terms.<sup>87</sup>

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<sup>86</sup> Monteiro, Armindo (1933), ‘Directrizes duma política ultramarina’, in *Para Uma Política Imperial. Alguns Discursos do Ministro das Colónias, Doutor Armindo Monteiro*, Lisbon, Agência Geral das Colónias, pp. 92-93.

<sup>87</sup> ‘Realmente, um estudo atento das conferências Imperiais inglesas – puras e típicas manifestações duma política colonial que tem subordinado todos os processos, toda a doutrina e toda a acção às superiores exigências dum plano económico – surpreende imediatamente pela facilidade com que a razão política cede perante a razão de ordem económica. Não é o nosso caso, nem pode ser o nosso sistema. (...) O Império Britânico é um império puramente económico. Só nesta base a sua unidade é forte, real e amparada. O Império Português é – ou será no desenvolvimento da política que está em marcha – um império uno na sua economia, na sua moral, no seu espírito e na sua política’ *Comércio do Porto*, 1<sup>st</sup> June 1933, p. 1. It was also transcribed in *Portugal Colonial*, 28 (June 1933), p 17

According to this popular trend of thought, the spiritual and moral foundation in which the dividing line between imperialist Britain and imperial Portugal was drawn had effects beyond the economic sphere. As mentioned in the introduction of this chapter, the second keystone for the self-definition of Portuguese colonialism as diametrically opposed to other European colonialisms was related to the use of violence.

## 5.2. The Portuguese Non-Violent Imperialism: an Empire of Love

In his controversial *Les Damnés de la Terre*, Frantz Fanon defined colonialism as ‘violence in its natural state’, being defeated only if confronted with greater violence by the abused colonised peoples.<sup>88</sup> The relation between coloniser and colonised in colonial societies was one of subjugation of the latter through the use of force: ‘their first encounter was marked by violence and their existence together (...) was carried on by dint of a great array of bayonets and cannons’.<sup>89</sup> In addition to actual physical violence, forms of cultural or epistemological violence destroyed ‘native social forms and broken up without reserve the systems of reference of the economy, the customs of dress and external life’, imposing the inferiority of the colonised as natural.<sup>90</sup> Violence shaped the new order in the colonial world, being a tool for the racialisation of the individuals and their compartmentalisation in a ‘world cut in two’ and ‘inhabited by two different species’.<sup>91</sup>

In light of the myth of the Portuguese non-violent imperialism, none of these forms of maltreatment of the colonised peoples was considered characteristic of

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<sup>88</sup> Fanon, Frantz (1963), *The Wretched of the Earth*, New York, Grove Press, p. 61. Original edition published as Fanon, Frantz (1961), *Les Damnés de la Terre*, Paris, François Maspero, p. 47.

<sup>89</sup> Fanon, Frantz (1963), *The Wretched of the Earth*, op. cit., p. 36.

<sup>90</sup> Idem, p. 40.

<sup>91</sup> Idem, p. 39-40.

Portugal's colonialism. When observed, violence was deemed an atypical phenomenon in Portugal's empire. As the minister of Colonies Francisco Vieira Machado summed up during his speech at the High Colonial Culture Conferences' inaugural session in 1936, colonial societies in the Portuguese empire were not a 'world cut in two' by segregation. There were no 'insurmountable barriers between the native populations and ourselves' nor racial prejudices.<sup>92</sup> Likewise, contact between individuals with different ethnic backgrounds was intimate, harmonious, and colour-blind: the axiom that 'we are all Portuguese, irrespective of the part of the national territory where we are born' was made clear to the colonised peoples.<sup>93</sup> Portuguese colonialism was – minister Vieira Machado continued – predicated on the 'respect of the native's human dignity'.<sup>94</sup> The consequences of such treatment could be observed:

'we treat the natives like men who may be our equals; (...) we conquered their love, we managed to peacefully ensure the respect of the Portuguese sovereignty in our dominions, where we keep hardly any armed forces (...). Portugal does not need force to make itself respected by its nationals – whatever their race – because they all worship it with refined love.'<sup>95</sup>

Giving love, conquering love, and receiving love – rather than brutal violence – was taken as the pillar of Portuguese colonialism. It was conceptualised as systematic and as an inherent element of the national character, being crucial to reinforce distinctive features of the Portuguese colonisers vis-à-vis the other colonisers, especially non-Catholic colonisers. Therefore, accounts on the first encounters with non-European peoples played an important role in the affirmation of the historical continuity of the Portuguese 'method'.

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<sup>92</sup> Machado, Francisco José Vieira (1936), 'O Discurso do Sr. Ministro das Colónias' in *Alta Cultura Colonial. Discurso inaugural e Conferências*, Lisbon, Agência Geral das Colónias, p. 16

<sup>93</sup> '(...) Todos somos portugueses, seja qual for a parte do território nacional em que tenhamos nascido. E os indígenas das nossas colónias sabem-no perfeitamente, porque somos nós os primeiros a ensinar-lhes este axioma.' Idem, p. 17.

<sup>94</sup> Ibidem.

<sup>95</sup> 'tratamos os indígenas como homens, susceptíveis de serem iguais a nós; (...) conquistámos o seu amor, que logamos fazer pacificamente respeitar a soberania portuguesa em todos os nossos domínios onde conservamos forças militares deminutíssimas. (...) Portugal não precisa da força para se fazer respeitar dos seus nacionais, qualquer que seja a sua raça, porque todos lhe querem com acrisolado amor'. Idem, p. 18.

### 5.2.1. Encounters with the heathen: conquest and occupation between evangelisation and bayonets

While exploring along the African coast after the military seizure of Ceuta in 1415 and other cities in the Moroccan Atlantic shore, Portuguese navigators gave preference to a non-hostile approach – even though not free of non-armed forms of coercion – in their initial encounters with local peoples. Taking into account the limited human and military means available in the metropole to provide backing for the Portuguese maritime venture, the adoption of a friendly treatment of Pagan Africans is not surprising. It was a vital strategy not only for the establishment of potential alliances against Muslims and future commercial partnerships but also for gathering important information about the unknown territories and their available resources.<sup>96</sup> In accordance with the aforementioned idea that Portuguese maritime expansion had been motivated by the desire to defeat Islamism and expand Christianity, the economic benefits of avoiding confrontation on first acquaintance were ignored in narratives on the interactions with extra-European peoples in the newly ‘discovered’ lands in the 1930s

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<sup>96</sup> On the first interactions between the Portuguese and West African peoples, see Bethencourt, Francisco (1998), ‘O contacto entre povos e civilizações’ in Bethencourt, Francisco and Kirti Chaudhuri (eds.), *História da Expansão Portuguesa*, Lisbon, Circulo de Leitores, vol. I, pp. 88-110, and Disney, Anthony (2007), ‘Portuguese Expansion, 1400-1800: Encounters, negotiations, and interactions’, in Bethencourt, Francisco and Diogo Ramada Curto (eds.), *Portuguese Oceanic Expansion, 1400-1800*, Cambridge, Cambridge University Press, ch. 9, pp. 283-313. See also Thomaz, Luís Filipe (1994), ‘O Projecto Imperial Joanino (Tentativa de Interpretação Global da Política Ultramarina de D. João II)’, *De Ceuta a Timor*, Lisbon, Difel, ch. 3, pp. 149-168; MacGaffey, Wyatt (1994), ‘Dialogues of the deaf. Europeans on the Atlantic coast of Africa’, in Schwartz, Stuart (ed.), *Implicit understandings: observing, reporting, and reflecting on the encounters between Europeans and Other Peoples in the Early Modern Era*, Cambridge, Cambridge University Press, ch. 8, pp. 249-268; Elbl, Ivana (2007), ‘Group Identities in the Early Portuguese Overseas Expansion in Africa: Concepts and Expressions’, *Portuguese Studies Review*, 15 (1-2), pp. 37-62. See also seminal Boxer, Charles R. (1963), *Race Relations in the Portuguese Colonial Empire 1415-1825*, Oxford, Clarendon Press.

and 1940s. Instead, they were focused on the importance of Christian faith in the definition of a specifically Portuguese *modus operandi* in the colonies.

The Christianisation of the Kingdom of Kongo, a territory that comprised nowadays Congo-Brazzaville and large portions of both Congo-Kinshasa and Angola, was presented as the finest example of the early Portuguese action. It attested that Portugal was ahead of its time in imperial matters, being engaged with the *civilising mission* long before the rhetoric of *civilising mission* had been codified and disseminated in modern colonialism. As encounters with natives occupied a marginal place in the construction of memory of empire, common metropolitan people in the 1930s and 1940s were told a vague but homogeneous story.<sup>97</sup>

Shortly, it started with Diogo Cão's first arrival to the mouth of Congo River in 1483. Having decided to navigate the river, the Portuguese explorer came across a group of Africans, becoming aware of the existence of the Kingdom of Kongo. Therefore, he sent some men of his crew – reports vary between men of his trust and former convicted felons – with generous offers to meet the King. Diogo Cão patiently waited for their return. However, since they did not come back as expected, he decided to sail back to Portugal and capture four natives, with the promise to return in about a year.<sup>98</sup> Diogo Cão obviously honoured his word, which much impressed the King of Kongo. Amazed not only by the opulent gifts but also by what Africans who had been

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<sup>97</sup> Amongst the pieces of work published or prized by *Estado Novo's* propaganda agencies that approached the Christianisation of Kongo, see Villas, Gaspar do Couto Ribeiro (1937), *História Colonial*, Vila Nova de Famalicão, Minerva; Quintanilha, João (1940), *Os Reis Negros*, Lisbon, Cosmos (Cadernos Coloniais); Farinha, António Lourenço (1941), *D. Afonso I, Rei do Congo*, Lisbon, Agência Geral das Colónias; Farinha, António Lourenço (1942), *A Expansão da Fé. Na África e No Brasil*, Lisbon, Agência Geral das Colónias, Silva, Marinho da (1942), *O Sentido do Imperialismo Português*, Lisbon, Agência Geral das Colónias. See also the colonial propaganda agency's luxury edition of Filippo Pigafetta's *Relazione del reame di Congo*, first published in Rome in 1591 based on the report of ambassador to the Pope sent by the Catholic king of the Kongo, Dom Álvaro I: Lopez, Duarte and Filippo Pigafetta (1949), *Relação do Reino do Congo e das Terras circunvizinhas*, Lisbon, Agência Geral das Colónias. For a less glamorised version of the events, see Felner, Alfredo de Albuquerque (1933), *Angola. Apontamentos sobre a ocupação e início do estabelecimento dos portugueses no Congo, Angola e Benguela*, Coimbra, Imprensa da Universidade.

<sup>98</sup> It stressed the fact it was not a violent capture. See, for instance, Ribeiro Villas's account, in which Africans seemed eager to join Diogo Cão's fleet. Villas, Gaspar do Couto Ribeiro (1937), *História Colonial*, op. cit. p. 59.

in Lisbon told him about their stay,<sup>99</sup> the King of Kongo took the initiative to send more of his subjects to be educated in Portugal.<sup>100</sup> Furthermore, he wrote to the King João II asking for ‘priests to teach catechesis to his people, carpenters and masons to construct churches and other Portuguese-style buildings, farmers to cultivate the land and women to bake bread and teach housekeeping to black women’.<sup>101</sup> After a third expedition, in 1491, this time led by Gonçalo de Sousa, without being pressured by the Portuguese, the King of Kongo asked to be baptised. He received the Christian name João, like the Portuguese ruler, and his wife Leonor, as the Portuguese queen. His son, baptised as Afonso (as the first Portuguese king), continued the Christianisation of his kingdom after his father’s death, being supported by the Portuguese. Unlike his father, whose enthusiasm for the new religion faded and continued some barbarian behaviours such as polygamy, king Afonso entirely assimilated Portuguese civilisation: alphabetised by Portuguese priests, he became acquainted with the religious foundations but also with Portuguese history, adopted occidental clothing and tried to reproduce the Portuguese political structures in his kingdom. His conversion was not merely religious but also cultural. The kingdom of Kongo was presented as a mimic version – although still in progress – of the kingdom of Portugal and treated as its equal by the Portuguese.

The story of the Christianisation of Kongo did not have an end: as mentioned on chapter 3, king Pedro VII of Kongo received much attention from the press during the 1938 presidential voyage, being an example of loyalty to Portugal in line with his ancestors of nearly five centuries before. The in-between difficulties in Kongo-Portugal relations, caused mainly by the Portuguese loss of interest after Vasco da Gama’s

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<sup>99</sup> According to Alfredo de Albuquerque Felner, the Portuguese King João II had assured that ‘all the entertainment and wellbeing’ had been provided, making the natives ‘aware of the value of our civilisation, our wealth and power.’ Felner, Alfredo de Albuquerque (1933), *Angola. Apontamentos sobre a ocupação e início do estabelecimento dos portugueses no Congo, Angola e Benguela*, op. cit. p. 20.

<sup>100</sup> According to priest António Lourenço Farinha, some young black men from the best families came [to Lisbon] in order to be educated in the Christian doctrine and instructed in the first letters. Farinha, António Lourenço (1942), *A Expansão da Fé. Na África e No Brasil*, Lisbon, Agência Geral das Colónias, p. 159.

<sup>101</sup> João II agreed: with the exception of women, the request was satisfied. Villas, Gaspar do Couto Ribeiro (1937), *História Colonial*, op. cit. p. 60.

discovery of the sea route to India and transformation of the Kongo in a mere outlet of slaves, were frequently not taking into account.<sup>102</sup>

What is more striking in the accounts about the encounters with the Kongolese is the implicit suggestion that the Portuguese did not have much to gain from their relationship with the African kingdom. In fact, it was highlighted that the education of young Africans in Portugal and the maintenance of missionaries in the Kingdom of Kongo were a costly enterprise for the Portuguese, not only monetarily but also regarding human lives lost in the harsh African climates. When referring to the exchange of gifts, those accounts insinuated that the Portuguese gifts given to the King of Kongo were more valuable than the ones they received, even though Kongo was in fact a strategic ally to have access to slaves and, therefore, an important economic partner. This economic detachment came together with a supposed respect for the society found in the newly discovered lands. In Alfredo de Albuquerque Felner's romanticised words, the Portuguese ships to Kongo

did not carried soldiers to conquest and, as they departed [from Portugal], it was already known that they will not be filled with gold, silk or spices. They transported builders, both priests and workmen, to implement a civilisation which product could not be immediately collect.<sup>103</sup>

Hence, the Portuguese were not interested in conquering the territory; their aim was only conquering the souls of its inhabitants to Christendom, laying the foundations for a more advanced society. As good Christians in the service of God, recuing an entire people from the backwardness of Paganism was their main reward. The relationship with the Kingdom of Kongo, which contrasted with the violent colonialism of the following European powers in the territory, was an example of the moral foundation in which Portugal's empire had been constructed. In contrast with the other colonial

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<sup>102</sup> The exception was Felner's well-documented book. Felner, Alfredo de Albuquerque (1933), *Angola. Apontamentos sobre a ocupação e início do estabelecimento dos portugueses no Congo, Angola e Benguela*, op. cit. See also Bender, Gerald J. (1978), *Angola Under the Portuguese: The Myth and the Reality*, Berkeley and Los Angeles, University of California Press, pp. 12-18.

<sup>103</sup> 'os navios não transportavam soldados para conquistas e, ao partir, já se sabia que os não ia encher de ouro, sedas e especiarias. Levava os obreiros, padres e operários, duma civilização que fomos implantar, e cujo fruto se não colheria logo'. Felner, Alfredo de Albuquerque (1933), *Angola. Apontamentos sobre a ocupação e início do estabelecimento dos portugueses no Congo, Angola e Benguela*, op. cit., pp. 25-26.

powers, Portugal had not based their authority on the oppression of conquered people but rather on the ‘creation of moral and intellectual bonds’ without establishing distinction between colonisers and colonised from the start of the colonial expansionist movement.<sup>104</sup> The main argument was that indigenous peoples were considered inferior only when and if they were not receptive to the benefits of Christianisation and resisted with violence, forcing the Portuguese to use greater violence and paving the way to colonial wars.

Amongst the episodes of colonial war, the overthrow of Gaza Empire, which comprised the territories between the Zambezi and Limpopo rivers in southern Mozambique,<sup>105</sup> in 1894-1895 under Joaquim Mousinho de Albuquerque’s command played a central role in collective memory in the 1930s and 1940s. Much acclaimed after his return from African campaigns, Mousinho de Albuquerque faded into oblivion in the last years of the Constitutional Monarchy and during the First Republic due to his involvement in an unsuccessful conspiracy to overthrow the Constitutional parliamentary regime in order to establish a conservative military dictatorship. He committed suicide shortly after 1902, which was later justified in *Estado Novo*’s propaganda as a result of his profound discontentment with the national political situation.<sup>106</sup> *Estado Novo* supported and revitalised the cult of Mousinho as a national hero, namely through the effusive commemoration of the 40<sup>th</sup> anniversary of the capture of Gaza’s king Gungunhana, meaningfully designated as *Dia de Mousinho* [Day of Mousinho].

Looking at the representation of the overthrow of Gaza Empire in the 1930s and 1940s accounts, ‘native violence’ and ‘Portuguese colonial violence’ emerge as two

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<sup>104</sup> Silva, Marinho da (1942), *O Sentido do Imperialismo Português*, Lisbon, Agência Geral das Colónias, vol. 1, p. 47.

<sup>105</sup> Gaza Empire was established and dominated by Nhuni chiefs – by a tribe of the Zulu clan of the Nguni, to be more specifically – having been founded after the secession from Zulu kingdom in the 1820s. In the 1930s and 1940s, the terms ‘Vátua’ and ‘Angune’ – both originated by a corruption of plural forms Nhuni people used to designate themselves – were interchangeably used to generically label every people who were part of Gaza Empire, regardless of their ethnic belonging. See Rita-Ferreira, António (1974), *Etno-História e Cultura tradicional do grupo Angune (Nguni)*, Memórias do Instituto de Investigação Científica de Moçambique, Vol. 10, pp. 3-247.

<sup>106</sup> Cunha, Amadeu (1936), *Mousinho. Grande Capitão de África*, Lisbon, Agência Geral das Colónias, vol. V (Coleção Pelo Império, n. 35), p. 66.

distinctive categories, being the latter always justifiable. First, it was stressed the Nhuni people were not natural from the Zambezi valley, arriving long after the first Portuguese colonisers: 'they were the intruders, entering the province of Mozambique and taking land that was under Portuguese sovereignty'.<sup>107</sup> Moreover, as the expansion and consolidation of the Gaza Empire was concurrent with the intensification of European – i.e. European other than Portuguese – penetration in the region, it was said to be fuelled by 'foreign adventurers' – mainly envoys of the British South Africa Company and protestant missions—<sup>108</sup> who wanted to prove that Portugal was not able to control its East Africa colony. While reading the various accounts on the episode of the attacks on Lourenço Marques in October 1894 and January 1885 that preceded the Portuguese campaigns, the savagery of Africans was not the only feature that stood out. The support (more or less unveiled) of Europeans, especially Britons, to those savage acts was also manifest: they were stimulated in order to be used as 'an indicative of the end of the rule of the Portuguese in a region they could not defend or govern'.<sup>109</sup>

Second, not only the Nhuni people seconded the Portuguese in the region in about three centuries, but they also initiated a period of instability by 'practicing all acts of barbaric war, banditry, and piracy'.<sup>110</sup> This situation was said to contrast with the peaceful atmosphere that had characterised the Zambezi Valley while the Portuguese were controlling it. The action of the first Portuguese settled in the region, creating commercial bonds with indigenous kings and converting some of them, was highly praised. João de Azevedo Coutinho, a military from the Portuguese Navy who had participated in the campaigns and later became colonial administrator in Mozambique, devoted several pages of his text on the battle of Macequece (or Massi Kessi, a site in

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<sup>107</sup> 'Pelo que respeita aos vátuas, é preciso não esquecermos que estes é que foram os invasores, entrando na Província de Moçambique e tomando terras dependentes da Soberania Portuguesa.' Toscano, Francisco and Julião Quintinha (1930), *A Derrocada do Império Vátua de Mousinho d'Albuquerque*, Lisbon, Editora Portugal Ultramar, p. 69.

<sup>108</sup> Meneses, José de Magalhães e (1935), *A Epopeia Militar Portuguesa da Última Década do Século XIX e Mousinho de Albuquerque*, Lisbon, Empresa Nacional de Publicidade, pp. 14-15

<sup>109</sup> Rocha Martins, Francisco (1933), *História das Colónias Portuguesas*, Lisbon, Imprensa Nacional de Publicidade, p. 550.

<sup>110</sup> Toscano, Francisco and Julião Quintinha (1930), *A Derrocada do Império Vátua de Mousinho d'Albuquerque*, Lisbon, Editora Portugal Ultramar, p. 69

present-day Zimbabwe close to the eastern border with Mozambique which, at the time, was located within the Portuguese sphere of influence) to introduce Zambezi valley before the Nhuni invasion.<sup>111</sup> He traced a portrait in many ways similar to the one of Kingdom of Kongo: the early encounter and the construction of churches along with the construction of *feitorias* (trading posts), voluntary conversions to Christianity (and also a case of a son of a indigenous aristocrat who ascended to a prominent position in Catholic Church's hierarchy) combined with the Portuguese aid in the expansion of previously Christianised kingdoms or the introduction of agricultural products and techniques.<sup>112</sup> The Nhuni were an element of de-civilisation, causing a setback to the Portuguese civilising mission from the 1820s.

The representation of the Nhuni people in the Gaza Empire demonstrates the use of violence as a racialising discourse. Their king, Gungunhana, was portrayed as the personification of extreme native violence. Francisco Toscano and Julião Quintinha described him as a bloodthirsty savage: Gungunhana had ordered the assassination of his own brother, the legitimate Gaza's Emperor after their father death; *né* Mudungaz, he suggestively adopted the name of a place where former Gaza emperors' enemies were killed.<sup>113</sup> Fratricide; polygamy; arrogance; alcoholism; Janus-faced character, pretending to be a vassal of Portugal while negotiating with foreign powers, promoting attacks to Portuguese settlers, not paying taxes to the coloniser and taxing for himself in his domains at the same time; promotion of human sacrifices to his gods and spirits; the spreading of terror through the promotion of wars to peoples that offered resistance to his expansionism, not sparing women or children; creation of obstacles to the penetration of Portuguese civilising mission, forcing peoples he conquered to adopt Gaza's way of life and abandon Christian habits and beliefs: the list of transgressions of moral principles which were perceived as essential assets of a man of honour and with

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<sup>111</sup> Coutinho, João de Azevedo (1935), *O Combate de Macequece. Notas sobre algumas das determinantes próxima se remotas do conflito*, Lisbon, Agência Geral das Colónias, 2 volumes (Colecção Pelo Império, n. 8 and 14.)

<sup>112</sup> Coutinho, João de Azevedo (1935), *O Combate de Macequece. Notas sobre algumas das determinantes próxima se remotas do conflito*, Lisbon, Agência Geral das Colónias, Vol. I (Colecção Pelo Império, n. 8), pp. 59-71.

<sup>113</sup> Toscano, Francisco and Julião Quintinha (1930), *A Derrocada do Império Vátua de Mousinho d'Albuquerque*, Lisbon, Editora Portugal Ultramar, pp. 71-72.

warrior's ethic seems endless, contributing to Gungunhana's demonisation and subsequent legitimisation of the use of violence by the Portuguese coloniser.

Moreover, the use of violence by the Portuguese, even in a context of war against a 'barbarian race' such as the Nhuni, was mitigated in the version of the events spread in the 1930s and 1940s. The distinction between African tribal violence, associated with cruelty and murder rather courage and strength, and the civilised European warfare stressed the Portuguese kindness, respect for the enemy, and capacity to forgive Africans who repent supporting the Portuguese rival. Mousinho de Albuquerque, who was understood as a personification of the Portuguese character, fits the stereotype of 'temperate hero' – in Sonya O. Rose's terms –, combining apparent anti-heroic traits, including kindness and fairness, with the typical soldier's adventurousness, emotional reserve, willingness to take personal risks to defend women and children and the country, bravery and courageousness.<sup>114</sup> According to Toscano and Quintinha, it was typical of Mousinho de Albuquerque's character to have 'sudden outbreaks of tenderness for humble people and situations', which was associated with his deep religiosity and Catholic morality.<sup>115</sup> References to the kindly way Mousinho treated Gungunhana's mother, a frail old woman, immediately after the imprisonment of her son not only lay emphasis on the coexistence of military virtues and compassion in the same man but also make clear that violence against Gungunhana was being used due to his acts only, being unrelated to his skin colour.<sup>116</sup>

Narratives on the evangelisation of the kingdom of Kongo in the fifteenth-century and the overthrow of the Gaza Empire in the late nineteenth-century are important as they both provided a historical background – either factual or manipulated

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<sup>114</sup> Rose, Sonya O. (2003), 'Temperate heroes' in Idem, *Which People's war? National Identity and Citizenship in Britain 1939-1945*, Oxford, Oxford University Press, ch. 5, pp. 151-196.

<sup>115</sup> '(...) rajadas de ternura intima para os casos e pessoas humildes'. Toscano, Francisco and Julião Quintinha (1930), *A Derrocada do Império Vátua de Mousinho d'Albuquerque*, Lisbon, Editora Portugal Ultramar, p. 234.

<sup>116</sup> Cunha, Amadeu (1935), *Mousinho. Grande Capitão de África*, Lisbon, Agência Geral das Colónias, vol. II (Coleção Pelo Império, n. 18), p. 59; Pimenta, Alfredo (1936), *Chaimite*, Lisbon, Agência Geral das Colónias (Coleção Pelo Império, n. 26), p. 27. Rocha Martins claimed that, after that, Gungunhana's mother kissed Mousinho's hand in gratitude. Rocha Martins, Francisco (1933), *História das Colónias Portuguesas*, Lisbon, Imprensa Nacional de Publicidade, p. 571

– to the rhetoric on the respectful relationship between colonisers and colonised peoples in the Portuguese empire. Taking into account that an essentialist approach to European colonialism was predominated in the 1930s and 1940s, the Portuguese inexistence of racial prejudices was central to forge a national self-image for both internal cohesion purposes (by stimulating national pride) and for international affirmation in a wider context that was unfavourable to the continuity of Portuguese colonialism. Yet, the discourse on Portuguese non-racism had limits.

### 5.2.2. Mixing Cultures and Bodies: race, adaptation, and miscegenation

By the time the new Constitution established the official start of *Estado Novo* in 1933, a new book was creating stir on the other side of the Atlantic. Brazilian sociologist Gilberto Freyre's *Casa Grande e Senzala* was a reflection on the origins of Brazil: he argued that miscegenation was the basis of Brazilian national identity and the lack of distinction between colonisers and colonised in the Portuguese empire was the one to blame.<sup>117</sup> According to Freyre, the colonisation of Brazil had been determined by two constitutive traits of Portugueseness.<sup>118</sup> First, the inexistence of racial prejudice amongst Portuguese colonisers had made possible the biological miscegenation. Brazil had been created in an ambience of sexual intoxication under Portuguese colonialism. In his view, this tendency was a consequence of the fact that the Portuguese themselves were the result of miscegenation occurred in the Iberian Peninsula before the formation

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<sup>117</sup> Freyre, Gilberto (2001[1933]), *Casa Grande e Senzala*, Lisbon, Livros do Brasil. Literally, the title means 'The Big House and the Slave Hut', although it has been translated to English as *The Masters and the Slaves*. See Freyre, Gilberto (1946), *The Masters and the Slaves: A Study in the Development of Brazilian Civilization*, New York, A. Knopf.

<sup>118</sup> See especially chapter III, 'O colonizador português: antecedentes e predisposições' [The Portuguese coloniser: background and predispositions], Freyre, Gilberto (2001[1933]), *Casa Grande e Senzala*, op. cit., pp. 189-275.

of the nation.<sup>119</sup> Furthermore, overlooking rape and other forms of coercion that were at the origin of biological miscegenation, Freyre claimed that the Portuguese humanised Christianity – a Latin Catholic version – had encouraged the respect and love for every one, notwithstanding the colour of their skin.

Second, the Portuguese had been more capable to adapt to the tropical regions than the coloniser from Northern European Countries. According to Gilberto Freyre, acclimatisation was easier for the Portuguese mainly due to Portugal's geographic position in South-Western Europe, being closer to Africa than any other coloniser and thus with a physical constitution more suitable for the harsh climate in the tropics. Moreover, the Portuguese colonisers' openness to indigenous people's knowledge enabled the use of their experience in order to minimise the adversities in the colonial territories.

The book was widely acclaimed in Europe – although not in Portugal – and in the United States, granting Gilberto Freyre, who was a disciple of Franz Boas and Franklin Giddings, a solid reputation in the field of modern cultural anthropology and sociology.<sup>120</sup> It was during a series of invited lectures in European universities during 1937 that he extended his interpretation to the totality of the Portuguese empire.<sup>121</sup> To be sure, the idea that the Portuguese were predisposed to engage in sexual intercourse or marriage with people of different – and 'inferior' – races in the colonies was already a rooted one. Accounts of earlier foreigner travellers to Brazil had contributed to spread

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<sup>119</sup> As Francisco Bethencourt unerringly noted, this belief ignores not only the racial discrimination that characterised the relation between different ethnic groups in the Iberian Peninsula but also the fact that, taking a long-term view, the other European peoples were also the result of a amalgamation of different ethnic influences. Bethencourt, Francisco (2014), *Racisms. From the Crusades to the Twentieth century*, Princeton and Oxford, Princeton University Press, p. 160.

<sup>120</sup> On *Casa Grande e Senzala's* international reception, see Lemaire, Ria (1991), 'Rereading Gilberto Freyre: Brazilian Identity, Brazilian Alterity and their Images', Raymond Corbey and Joseph Theodoor Leerssen (eds.) *Alterity, Identity, Image: Selves and Others in Society and Scholarship*, Amsterdam, Editions Rodopi, pp. 139-159. On reception in Portugal see Léonard, Yves (1997), 'Salazarisme et Lusotropicalisme. Histoire d'une appropriation', *Lusotopie 1997*, pp. 211-226 and Castelo, Cláudia (1998), '*O Modo Português de Estar no Mundo*'. *O luso-tropicalismo e a ideologia colonial portuguesa (1933-1961)*, Oporto, Edições Afrontamento.

<sup>121</sup> The lectures were later gathered in a volume titled *O Mundo que o Portugues Criou* [The World Created by the Portuguese] Freyre, Gilberto (1940), *O mundo que o português criou: aspectos das relações sociais e de cultura do Brasil com Portugal e as colónias portuguesas*, Rio de Janeiro, José Olympio.

the idea of inter-racial promiscuity in the Portuguese empire in international imagination. For instance, French nobleman Guy Le Gentil De La Barbinais had already expressed his astonishment and disapproval of Portuguese men's preference for African or mixed race women over women of European origin observed during his voyage to Brazil in 1718-1719.<sup>122</sup> As the scientific idea of race was consolidated and eugenics became more and more embedded in European imperialism, the 'bizarre taste' in women of the Portuguese, to use Le Gentil De La Barbinais's words, turned out to be a major problem. Brazil – and Portuguese colonisation by association – soon emerged as the archetype of degeneration caused by too intimate contact between individuals of different races.<sup>123</sup> During the nineteenth-century, the idea that the Portuguese colonisers' lustful drive took control of the colonising process at the expense of racial purity and the same shameless mistakes in Brazil were being repeated in Africa was settled.<sup>124</sup>

Indeed, with the exception of Cape Verde, the percentage of people of mixed race in Portuguese colonies was much lower than in Brazil.<sup>125</sup> While more than a quarter of the Brazilian population in 1950 was constituted by *mestiços*, only 1.1% of the population was of mixed-race origin in Angola.<sup>126</sup> In Portuguese Guinea, *mestiços* were 0.9% of the population – yet, the number dropped to 0.56%, if Cape Verdean migrants

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<sup>122</sup> Le Gentil De La Barbinais, Guy (1727), *Nouveau Voyage au Tour Du Monde*, Paris, Chez Flahault, Tome Troisième, p. 204.

<sup>123</sup> An early example is Louis Agassiz, a Swiss-born anthropologist from Harvard University and pioneer in the use of photography in the study of racial differences. In his account of the expedition in Brazil in 1865, he added a footnote just to advise 'any one who doubts the evil of this mixture of races, and is inclined, from mistaken philanthropy, to break down all barriers between them, come to Brazil', Agassiz, Louis (1869), *A Journey in Brazil*, Boston, Ticknor and Fields, p. 293. See also Maxwell, Anne (2008), *Picture Imperfect. Photography and Eugenics, 1870-1940*, Brighton, Sussex Academic Press, pp. 22-29.

<sup>124</sup> See, for instance, Newitt, Malyn (2002), 'British Travellers Accounts of Portuguese Africa in the Nineteenth Century', *Revista de Estudos Anglo-Portugueses*, 11, pp. 103-129.

<sup>125</sup> In 1950, 69.6% of the Cape Verde's population was of mixed-race. In São Tomé and Príncipe, which was also uninhabited by the arrival of the first Portuguese explorers but became a plantation colony grounded on slave work, *mestiços* were 7.1% of the population. Mata, Maria Eugénia (2007), 'Interracial marriage in the Last Portuguese Colonial Empire', *e-Journal of Portuguese History*, 5 (1), p. 7.

<sup>126</sup> Ibidem. See also Alencastro, Luiz Filipe (2012), 'Mulattos in Brazil and Angola: A Comparative Approach, from the Seventeenth to the Twenty-First Century' in Bethencourt, Francisco and Adrian Pearce (eds.), *Racism and Ethnic relations in the Portuguese-speaking world*, Oxford, The British Academy-Oxford University Press, ch. 4, pp. 71-96.

to the neighbouring colony were excluded.<sup>127</sup> The percentage of *mestiços* in Mozambique was 0.48% of total population.<sup>128</sup> In Asian colonies, the percentage was even lower, being comparable to French West Africa and French Indochina.<sup>129</sup> Nevertheless, ingrained mental representations are powerful and the image of Portugal as a colonial power was compromised: race-mixing and consequent degeneration were evidence of the Portuguese unsuitability to possess and civilise a huge empire. Unable to control themselves through the restraint of their sexual instincts, they were also unable to control 'inferior races'. In fact, the Portuguese 'deviant sexuality', more libertine and less guilt-ridden made them closer to be an inferior race themselves.<sup>130</sup> As such, Portugal faced a gigantic '*mestiço* problem'. However, the public visibility of the '*mestiço* problem' was somehow limited in metropolitan Portugal during the 1930s and 1940s.

To be sure, race-mixing in the Portuguese empire was not considered a negligible issue. Physical anthropologists devoted much attention to the dangers of interracial unions and their offspring. Despite the lack of research supporting their

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<sup>127</sup> Bender, Gerald J. (1978), *Angola Under the Portuguese: The Myth and the Reality*, Berkeley and Los Angeles, University of California Press, p. 32.

<sup>128</sup> Ibidem. Mata, Maria Eugénia (2007), 'Interracial marriage in the Last Portuguese Colonial Empire', op. cit.

<sup>129</sup> 0,06% in Macau, 0.03% in Portuguese India and 0.01% in Timor according to data collected by Gerald Bender. Bender, Gerald J. (1978), *Angola Under the Portuguese: The Myth and the Reality*, Berkeley and Los Angeles, University of California Press, p. 32. Based on the 1950 statistical yearbook, Maria Eugénio Mata mentioned 1% of *mestiços* in Macau. Mata, Maria Eugénia (2007), 'Interracial marriage in the Last Portuguese Colonial Empire', op. cit. p. 7. For French West Africa, see White, Owen (1999), *Children of the French Empire: Miscegenation and Colonial Society in French West Africa, 1895-1960*, Oxford, Oxford University Press, pp. 3-4, and for French Indochina, Saada, Emmanuelle (2012), *Empire's Children. Race, Filiation, and Citizenship in the French Colonies*, Chicago - London, University of Chicago Press.

<sup>130</sup> The association between race and sexuality structured colonial discourses across empires and over centuries. Said, Edward (1979), *Orientalism*, New York, Vintage Books - Random House, p. 190. See also McClintock, Anne (1995), *Imperial Leather: Race, Gender and Sexuality in the Colonial Contest*, London, Routledge; Morgan, Jennifer (1997), "'Some Could Suckle over Their Shoulder": Male Travellers, Female Bodies, and the Gendering of Racial Ideology, 1500-1770', *The William and Mary Quarterly*, 54 (1), pp. 167-192; Stoler, Ann Laura (2002), *Carnal Knowledge and Imperial Power: Race and The Intimate in Colonial Rule*, Berkeley; University of California Press; Phillips, Richard (2006), *Sex, Politics and Empire: A Postcolonial Geography*, Manchester, Manchester University Press; Levine, Philippa (2003), *Prostitution, Race, and Politics: Policing Venereal Disease in the British Empire*, London, Routledge.

perspective, leading scholars of the two most important schools of anthropology in Portugal – Mendes Correia, from Oporto University and Eusébio Tamagnini, from Coimbra University –<sup>131</sup> were very vocal on their condemnation of miscegenation, as their interventions during the 1934 Congress of Colonial Anthropology demonstrate. Mendes Correia presented the data of a questionnaire survey concerning the attitudes of ‘educated Portuguese who live or lived in the colonies’ toward miscegenation, complemented with the anthropometric study of 13 *mestiços* relocated in Oporto for taking part in the Colonial Exhibition. Based on the opinion of the thirty-six people that filled out the questionnaire, Mendes Correia concluded that ‘the large majority of the votes are against racial mixing in view of the high interests of the nation and of humanity’.<sup>132</sup> Also Tamagnini believed that sanitising racial mixing was essential to preserve the energy and strong character of Portuguese people in the colonies. In his view, notwithstanding recognising there was no evidence that half-breeds were not ‘physiologically efficient machines’,<sup>133</sup> people of mixed race were unable to integrate themselves in their parents’ societies, being a source of social turbulence. A similar opinion can be read in Germano Correia’s intervention during the Congress. However, while Germano Correia called for state intervention to help poor inter-racial couples so

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<sup>131</sup> Inspired by German Eugenics, Eusébio Tamagnini and Mendes Correia founded the Portuguese Society of Eugenics in 1937. On Mendes Correia and Oporto’s Anthropology School, see Matos, Patrícia (2012), *Mendes Correia e a Escola de Antropologia do Porto. Contribuições para o estudo das relações entre antropologia, nacionalismo e colonialismo (de finais do século XIX aos finais da década de 50 do século XX)*, Lisbon, ICS (Unpublished doctoral dissertation). On Eusébio Tamagnini and Coimbra’s Anthropology School, see Santos, Gonçalo Duro (2005), *A Escola de Antropologia de Coimbra, 1885-1950*, Lisbon, Imprensa de Ciências Sociais. See also Roque, Ricardo (2006), ‘A Antropologia Colonial Portuguesa (c. 1911-1950)’, Curto, Diogo Ramada (ed.), *Estudos de Sociologia da Leitura em Portugal no Século XX*, Lisbon, FCG-FCT, pp. 789–822; Matos, Patrícia (2010), ‘Aperfeiçoar a “raça”, salvar a nação: eugenia, teorias nacionalistas e situação colonial em Portugal’, *Trabalhos de Antropologia e Etnologia*, 50, pp. 89-111; Santos, Gonçalo Duro dos (2012), ‘The Birth of Physical Anthropology in Late Imperial Portugal’, *Current Anthropology* 53 (5), pp. 33–55.

<sup>132</sup> Mendes Correia, A.A. (1934b), *Os mestiços nas colónias portuguesas. Comunicação no I Congresso Nacional de Antropologia Colonial*, Oporto, Edições da 1ª Exposição Colonial Portuguesa, p. 21. Four people had positive attitudes, two had different attitudes depending on the races involved and fifteen had negative attitudes. *Idem*, p. 10.

<sup>133</sup> Tamagnini, Eusébio (1934), Os problemas da mestiçagem. Conferência proferida na Sessão Plenária do I Congresso Nacional de Antropologia Colonial, Oporto, Edições da 1ª Exposição Colonial Portuguesa, p. 17.

that their children could be educated rather than measures to avoid miscegenation,<sup>134</sup> Tamagnini believed that the hidden menace of miscegenation had to be taken seriously and immediately stopped in the Empire.

Race-mixing was also on the mind of Portuguese colonial experts. The place of family migration in the debates on European settlement in the colonies, which we explored in the previous chapter, demonstrates the importance given to the presence of European women to prevent interracial sexual relations. The idea that the progeny of mixed marriages would mitigate the distinction between Europeans and Africans, undermining the coloniser's authority was dominant. Sexual contamination was linked to physical and moral deterioration of the race, shaping attitude towards settlement that can also be observed in the model settlement created by official authorities.

Although the Portuguese government did not adopt legislation to forbid mixed marriages, forms of legal discrimination punished these unions. A curious and significant example dates back 1938, just a few months after the end of the first presidential voyage to Africa, and clearly exposes the fragility of the discourse on national unity and Portugueseness without distinction of race that dominated the galvanised accounts that could be read in the press during General Carmona's tour.<sup>135</sup> In accordance with legislation adopted in 1926, children born in the colonies from a Portuguese European father and mother were formally considered equal to any metropolitan national.<sup>136</sup> In 1938, the same rights were extended to all legitimate lineal descendants;<sup>137</sup> yet, an exception was added: 'as long as there is no crossbreeding with individuals of native races from the colonies'.<sup>138</sup> However, despite the restriction of mixed-race people's citizenship rights was clearly a basic necessity for political

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<sup>134</sup> Correia, Germano (1934), *Os Euroafricanos de Angola. Comunicação ao I Congresso Nacional de Antropologia Colonial*, Oporto, Edições da 1<sup>a</sup> Exposição Colonial Portuguesa. On Germano Correia, see Bastos, Cristiana (2003), «Um luso-tropicalismo às avessas: colonialismo científico, aclimação e pureza racial em Germano Correia» in Ribeiro, Margarida Calafate and Ferreira, Ana Paula (eds.), *Fantasmas e fantasias Imperiais no Imaginário Português Contemporâneo*, Oporto, Campo das Letras, pp. 227-253.

<sup>135</sup> See chapter 3.

<sup>136</sup> Article 24<sup>th</sup>, Decree 12.209, *Diário do Governo*, 27<sup>th</sup> August 1926.

<sup>137</sup> Article 8<sup>th</sup>, Decree 29.244, *Diário do Governo*, 8<sup>th</sup> December 1938.

<sup>138</sup> 'desde que não exista cruzamento com indivíduos das raças nativas das colónias.' Idem.

intervention, miscegenation was virtually absent from official discourses in the 1930s and 1940s.

Hence, the miscegenation problem's visibility was reduced in the sense that it was a marginal topic outside academic discussions and intellectual colonial circles. Moreover, miscegenation was not always represented as a problem in media that were able to reach a wider audience. For instance, the main character in one of the most popular titles of Portuguese colonial literature not only takes an African woman as concubine, but also decides not to look for a Portuguese wife during his visit to the metropole and is eager to return to the arms of his children's mother.<sup>139</sup> The lack of repugnance of the Portuguese regarding sexual approaches to elements of other ethnic origins was also praised and presented as an evidence of their higher colonising capacity in the pages of colonial agency's periodic, *O Mundo Português*. According to José Osório de Oliveira,

Indeed, sexual instinct, which is more intelligent than the other peoples' rationality, caused the Portuguese to establish a communion of races in Brazil. Anglo-saxon peoples' non-humane prejudices created an unsolvable and anti-Christian problem in the United States.<sup>140</sup>

Although José Osório de Oliveira was an employee of the ministry of Colonies' propaganda services, his opinion did not reflect any official position. It was not the endorsed position in this periodical, either. Discourses on miscegenation in *O Mundo Português* are not monolithic. A trend strands out, though. Despite recognising that interracial unions were inevitable and fundamental for the successful colonisation in the early Portuguese empire since immigration of European women to the colonies was forbidden, for some authors, race-mixing was a practise of the past and, most

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<sup>139</sup> 'Como se Faz um Colonial' [How a colonial man is made] included in Quintinha, Julião (1933) *Novela Africana*, Lisbon, Editor Nunes de Carvalho.

<sup>140</sup> 'O instinto sexual, mais inteligente do que a razão de outros povos, fez, de facto, com que os portugueses estabelecessem no Brasil a comunhão de raças. Os preconceitos desumanos dos anglo-saxões criaram nos Estados Unidos um problema insolúvel e anti-cristão.' Oliveira, José Osório (1934), 'A mestiçagem. Esboço duma opinião favorável', *O Mundo Português*, 11 (Nov. 1934), p. 368.

importantly, not related to ‘indecorous behaviours’.<sup>141</sup> When approaching the topic of miscegenation in the Portuguese empire, these authors put emphasis on the political measures taken as early as the sixteenth century in Portuguese India to regulate sexual conducts. First, the Portuguese colonisers were victims of the local women’s oversexuality: they had been seduced by had been seduced by ‘libidinous natives’ in India, wasting their money in expensive gifts for their lovers and all the energies that should be canalised for colonisation and expansion of Portuguese dominions.<sup>142</sup> Second, debauchery had been promptly eliminated. By allowing mixed marriages with ‘beautiful and pale natives’ who had been baptised, India’s governor Afonso de Albuquerque had moved away from concubinage toward family formation and Christian legal unions in the sixteenth century. Therefore, the Portuguese were not represented as men unable to control their passions and their inner ‘animal’ nature but rather as good Christians committed with the civilising mission of India’s natives in a society with no colour bar.<sup>143</sup> From this perspective, the Portuguese Empire was not the location of sexual opportunities and licentiousness represented in Gilberto Freyre’s work: although the Portuguese did not have racial prejudices, they were not promiscuous in their interracial relations.<sup>144</sup>

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<sup>141</sup> See João Baptista Amâncio Gracias, ‘A Primeira mulher portuguesa na Índia’, *O Mundo Português*, 4, April 1934, pp.143-150, José Ferreira Martins, ‘Política de Colonização. Uma medida de largo alcance’, *O Mundo Português*, 64, April 1939, pp. 135-140; Marinho da Silva, ‘Política Imperial. Colonização’, *O Mundo Português*, 134, February 1945, pp. 63-69

<sup>142</sup> João Baptista Amâncio Gracias, ‘A Primeira mulher portuguesa na Índia’, *O Mundo Português*, 4, April 1934, pp.143-150.

<sup>143</sup> On the stigmatisation of the offspring of such unions in Goa and early attempts to revert its effects and reinforce the dividing line between colonisers and colonised, see Xavier, Angela Barreto (2008), ‘Dissolver a diferença. Mestiçagem e conversão no império português’, in Cabral, Manuel Villaverde (ed.), *Itinerários. A investigação nos 25 anos do ICS*, Lisbon, Imprensa de Ciências Sociais, pp. 709–727. See also Xavier, Angela Barreto (2008), *A invenção de Goa: poder imperial e conversões culturais nos séculos XVI e XVII*, Lisbon, Imprensa de Ciências Sociais.

<sup>144</sup> Stoler, Ann Laura (1989), ‘Making Empire Respectable: the Politics of Race and Sexual Morality in Twentieth-Century Colonial Cultures’, *American Ethnologist*, XVI (4), pp. For a theoretical approach to the importance of the education of sexual conducts and repression of desire in colonial contexts, see Stoler, Ann Laura (1995), *Race and the Education of Desire. Foucault’s History of Sexuality and the colonial order of things*, Durham and London, Duke University Press. See also Stoler, Ann Laura (2002), *Carnal Knowledge and Imperial Power. Race and the intimate in colonial rule*, Berkeley – Los Angeles, University of California Press, especially chapters 1, 3, and 4.

Other aspects of Gilberto Freyre's theory were less controversial. In fact, the idea that the adaptation to tropical regions was easier for the Portuguese than for Northern Europeans was a cornerstone of colonial ideology in the first two decades of the *Estado Novo*. Unlike the British 'who takes every possible comfort of his home to the tropics', the Portuguese conformed to the harshest conditions.<sup>145</sup> The justification was focused on their psychological qualities, rather than on physical virtues of the race, being inscribed in national mentality. As minister of Colonies Armindo Monteiro summed up, the Portuguese were 'an example of faith, serene courage, disregard for danger and sufferings, sobriety, persistence, and continuity in work and the great love of the soil'.<sup>146</sup> It is worth quoting in length:

It is in this marvellous spirit of adaptation that lays the secret of our colonising triumph. And to help it we should mention three more splendid factors: The spirit of initiative of the Portuguese settlers; their earnest and profound nationalism; their talent to deal with the inferior races. (...)

This conquest of natives' hearts we owe to the wonderful work, tact and intelligence of the Portuguese colonisers, without any exception; it is *the unmistakable mark of Portuguese colonisation*. This achievement we regard as natural, for it comes from a sense born in us and we consider it as important and necessary to our minds and souls, as the honour and independence of our country.<sup>147</sup>

His words on what made the Portuguese different from the other colonisers are self-explanatory.

The transformation of cosmovisions on colonial domination after the Second World War impelled a transformation of *Estado Novo's* rhetoric for the affirmation of Portugal's legitimacy to proceed colonisation in a world shaped by decolonisation. As mentioned on chapter 3, from 1951 *colonies* gave way to *overseas provinces* and the

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<sup>145</sup> Minister of Colonies José Bossa's broadcasted conference on 23rd February 1935. Reprinted in *O Mundo Português*, 18 (June 1935), pp. 185-193; here p. 189.

<sup>146</sup> Monteiro, Armindo (1933), *The Portuguese in Modern colonisation*, Lisbon, Agência Geral das Colónias, p. 23.

<sup>147</sup> Idem, pp. 23-24. Emphasis added.

Portuguese *colonial empire* was now the *Overseas*. As Cláudia Castelo and Yves Léonard noted, Gilberto Freyre's work, which had been ignored by political power in the 1930s and 1940s, became instrumental to support *Estado Novo*'s new rhetoric and its imperial project.<sup>148</sup>

The consolidation of *Estado Novo*'s appropriation of Gilberto Freyre's ideas and international prestige took place beyond the time frame of this project. Between August 1951 and February 1952, Gilberto Freyre visited metropolitan Portugal, the Portuguese African colonies and Portuguese India. During a press conference on his arrival to Lisbon right before departing for the 'overseas provinces', Freyre affirmed that he 'proclaim[s] Portuguese virtues because I have found, in my studies, reasons and foundations to react against the malicious fiction or legend that the Portuguese were – and still are – a people of incompetents'.<sup>149</sup> Nevertheless, the tour had been organised by the now renamed ministry of Overseas: even though Freyre denied any political influence on his observation, his study trip was limited to the choices of the organiser.

It was during this tour, at a conference at the *Instituto Vasco da Gama* in Goa, that Gilberto Freyre coined the term 'luso-tropical'.<sup>150</sup> It has been argued that from then onwards, the discourses of national identity and colonialism in Portugal were informed by the sociological construction of category of Luso-tropicalism. As Cláudia Castelo and Yves Léonard stressed, even though predicated on myths and misconceptions about the Portuguese that were already ingrained in metropolitan culture, the new 'scientific' formulation granted additional legitimacy to Portuguese imperialist rhetoric in the age of decolonisation; the way in which this scientific formulation effectively framed circulating discourses on national identity would require further investigation, though.

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<sup>148</sup> Léonard, Yves (1997), 'Salazarisme et Lusotropicalisme. Histoire d'une appropriation', *Lusotopie 1997*, pp. 211-226 and Castelo, Cláudia (1998), '*O Modo Português de Estar no Mundo*'. *O luso-tropicalismo e a ideologia colonial portuguesa (1933-1961)*, Oporto, Edições Afrontamento.

<sup>149</sup> 'Um brasileiro independente e escritor desinteressado que se proclama (...) as virtudes lusitanas, é por ter encontrado, através do estudo, motivo e base para reagir contra a lenda ou ficção maliciosa de ter sido o português – ou continuar a ser – um povo de incapazes.' *Diário de Notícias*, 14<sup>th</sup> August 1951, p. 1.

<sup>150</sup> Freyre's interventions presented in these conferences had been gathered in Freyre, Gilberto (1953), *Um brasileiro em terras portuguesas: introdução a uma possível luso-tropologia acompanhada de conferências e discursos proferidos em Portugal e em terras lusitanas e ex-lusitanas da Ásia, da África e do Atlântico*, Rio de Janeiro, José Olympio.

The idea that a particular set of features was associated with different nationalities and that these features were at the origin of different colonial methods was prevalent. This final chapter explored two core ideas about the distinctive features of Portuguese national character that crossed the discourses on empire, permeating also the debates on the themes approached on the previous chapters, as they were seen by the contemporaries in the metropole. The Portuguese were represented as inborn colonisers, outperforming the other Europeans due to their mentality framed by religion. Banishing undesirable traits and projecting them onto the other European colonial powers, Portuguese colonialism was presented as a distinctive form of government in the tropics that did not fit the usual conception of colonial domination.



## CONCLUSION

*A society is not constituted simply by the mass of individuals who comprise it, the ground they occupy, the things they use, or the movements they make, but above all by the idea it has of itself.*

Émile Durkheim<sup>1</sup>

In the 1930s and 1940s, Portuguese people in the metropole were reminded of Portugal's imperial status on a regular basis. Many of them may not have thought of the Portuguese empire when consuming tea from Mozambique or cocoa from São Tomé e Príncipe. Many of them may not have meditated on Portuguese imperial past every time they walked on a street named after a navigator in their hometown. In fact, many of them may not even consume those treats and lived in villages where the streets had no name. Yet, Portuguese children in the metropole were told about Cape Verde, Portuguese Guinea, Angola, São Tomé and Príncipe, Mozambique, Portuguese India, Macau, and Timor in their primary school years. Names of the most important

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<sup>1</sup> Durkheim, Émile (1995 [1912]), *The Elementary Forms of Religious Life*, New York – London, The Free Press, p. 425.

rivers and railways in the colonies and the main commodities produced in each colony were learnt by heart. They also learnt that Portugal had been even greater: Portuguese overseas enterprise was five centuries old and schoolboys and schoolgirls were repeatedly taught about the great achievements of the Discoveries from the third grade.

The Empire was a central aspect of national life. But what did it mean to be part of such an Empire-driven society?

In this dissertation, I have shown that the meaning of being an imperial national was negotiated on a constantly basis. As national identity is intrinsically relational, rivalry with the other colonial powers played a crucial role in the definition of what Portugal and the Portuguese had been, what they were, and what they should be in the future in the Portuguese society in the 1930s and 1940s. However, this process was not in any sense an easy and well-defined demarcation of the frontiers between ‘we’ and ‘the others’.

Being Portuguese was belonging to a nation with a colonial past that dated back to the early-fifteenth century. It was making part of the same people than Henry the Navigator and the heroic men who left the European shore, embarking on dangerous missions in unknown oceans to discover ‘new worlds’ at a time other European nations were yet to be formed, let alone were ready to initiate a colonial enterprise as the Portuguese. Being Portuguese was condemning these other nations, which had cowardly and ungratefully created their empires at the expenses of the Portuguese courageous pioneering effort. The distinctive process of foundation and consolidation of the Portuguese empire in contradistinction to the foundation of the other European powers’ empires was a crucial. Yet, the oldest colonial power had to keep away from itself the image of an old colonial power attached to out-dated colonial traditions that hindered the colonies’ advancement – and ‘old paralytic lady’, to recall the suggestive metaphor that appeared on Polish press during the debate on the redistribution of the colonies on the eve of the Second World War. Therefore, being Portuguese was also belonging to the nation that was able to keep itself up to date regarding modern colonialism trends and adopt the most advanced colonial

policies. The supposedly avant-garde legislation on protection of Africans labourers in the early 1930s and or the edification of the largest high school in the entire African continent initiated in the late 1940s, for instance, were used to attest this commitment to Progress.

Being Portuguese was belonging to an imperial nation but not to an imperialist nation in the economic sense of the term. It was, thus, claiming that Portuguese imperialism was dissociated from the quest for profit. Either theories about the desire to propagate Christian faith as the principle motor force of the early overseas expansion or the rhetoric on civilisation through work in the modern period were instrumentalised as evidence of the high moral principles that had oriented the Portuguese colonial enterprise from the start. Not being centred on the economic gains of colonial domination was a specifically national approach to the Empire. In other words, it was perceived as Portugal's – and Portugal's only – imperial *modus operandi*. However, at the same, being Portuguese was also belonging to an ingenious people that, albeit the little resources available, was not only capable of making its Empire profitable, but also did not lag behind or did better than wealthier colonial powers. In this sense, being Portuguese was being naturally more skilled to pursue a colonial enterprise than any other people, an aspect that was extremely important in a context of (perceived) foreign threats to the Portuguese empire's permanence.

Being Portuguese was belonging to a nation with a tolerant empire in which racial prejudices were non-existent. It was being born with a special temperament that predisposed people to tolerance, facilitating the first encounters with extra-European peoples and the perpetual humanitarian approach to the colonised in the Portuguese colonies. It was making part of a nation whose President of the Republic hugged Africans while travelling to the colonies in 1938 and 1939 but it was also making part of a nation where fears of racial degeneration were widely shared by colonial intelligentsia. The affirmation of the non-racism as a central feature of Portuguese national identity coexisted with projects to establish 'islands of whiteness' in Africa based on racial segregation in order to avoid situations that could compromise the prestige of Portuguese settlers in the eyes of the colonised, as well as in the eyes of the other European colonial powers. Moreover, while insisting on Portuguese non-racist attitudes, efforts were made to dissociate the Portuguese empire from the idea

that race-mixing was customary and, thus, approximating Portugal from what was considered a 'right practice' in modern colonialism.

In the 1930s and 1940s, being Portuguese oscillated between belonging to a country with a colonial empire and a nation with European and overseas provinces. While debates on the 'proper' terminology to designate the Portuguese colonial empire moved around assimilation and autonomy policies, they concurred on the some key features: the indivisibility of the Portuguese empire and the unity between their constitutive parts were a specifically Portuguese creation. It was obviously perceived as something unachievable by any other colonial empire.

All the abovementioned representations of national identity were volatile, being articulated and re-articulated in different combinations in response to the evolution of internal and external contexts. The boundaries of national belonging are constituted through the exclusion of 'the others' – but defining the 'the others' is complex. The meaning of being Portuguese was shaped by a tension between, on the one hand, the affirmation of the exceptionalism of the Portuguese colonialism against the other colonial powers and, on the other, the need to cope with other European powers' colonial projects in order to prove that Portugal was legitimately one of their peers, belonging to the highly selective club of great colonial empires.

Although different conceptions about what Portugal had been, was, and will be, the idea the Portuguese society had of itself in the 1930s and 1940s cannot certainly be dissociated from the Empire.

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*L'Écho de Paris*  
*Le Soir*  
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