

# BETWEEN NERO AND PROMETHEUS

*The Marquis of Pombal and the emergence of Party History  
(18<sup>th</sup>-21<sup>st</sup> centuries)*

**José Eduardo Franco,  
Luiz Eduardo Oliveira  
and Christine Vogel**  
(Coordinators)

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*Twice had the sun risen over the city of desolation since the dreadful catastrophe of the 1st of November; and the flames yet raged in every part. Nearly twenty thousand persons, it was supposed, had been destroyed by the earthquake; and the greater number of the remaining citizens had quitted the fatal spot, and were encamped in the open fields in the neighbourhood; some with scarcely clothes to cover them, and without food to supply the cravings of hunger. Here all classes and orders of people were promiscuously mingled; respectable citizens reduced to abject poverty by the entire destruction of their property; the hapless virgins dedicated to the service of Heaven, driven from their sanctuaries among the most lawless and abandoned of mankind. Servants and their former masters; ladies, accustomed to gentle nurture, among mechanics, soldiers and porters; the virtuous and the profligate, the rich and the poor, the noble and the beggar, in the same wretched condition. The whole fabric of society was completely disorganized; murders, robberies, and all species of crimes were committed with the most flagrant daring; and naught was heard but groans and cries of distress. Slight shocks still continued to be felt at intervals of every half hour; famine also had visited them; and, to add to their disasters, the effluvia arising from the vast number of dead bodies which choked up the streets, threatened them with a pestilence; so that hundreds of those who were able had already taken their departure to other towns; and the city would have been completely deserted, had not Sebastiao Jozé de Carvalho, now created Prime Minister, exerted his utmost power to prevent so unfortunate an event to the kingdom.*

William Kingston, in *The Prime Minister* (1845, pp. 223-224)

# INTRODUCTION

Pombal is one of the most representative and complex figures of European political Enlightenment, both in terms of theory and political action and in terms of the reception of his personality and work. Today, he is usually mentioned by historians of the Age of Enlightenment in the same breath as other important ministers of reform absolutism such as Walpole, the elder Pitt, Fleury, Choiseul, Tanucci or Kaunitz. The extent to which he polarized the European public already during his lifetime, and even more so after his death, is, however, rarely discussed today outside Portugal and Brazil. Kenneth Maxwell is the important exception that proves the rule, and he deserves credit for drawing the attention of non-Portuguese-speaking historians to this important figure of the European Age of Enlightenment, by rightly characterizing Pombal as an example par excellence of the *paradox of the Enlightenment*, that is, he is described as a political personality who embodied the best and most contradictory aspects of a political leader who claimed to be governed by the ideology of enlightened reason<sup>1</sup>.

Pombal's historiographical reception, both in Portugal and Brazil and to some extent even in Europe, has been marked by a real conflict of interpretations, with the assessment of his personality and political ideas divided into two fields classified as being radically non-consensual: that of the antipombalists and that of the philopombalists. To the extent that the historian Marc Bloch made the following appeal to the circle of scholars in Pombal: "Pombalists, antipombalists, just tell us who Pombal was"<sup>2</sup>.

Indeed, Sebastião José de Carvalho e Melo, who became Secretary of State and later established himself as Prime Minister of King José I of Portugal, was a reformer who created the first demarcated wine region in the world in a regulated way (Port Wine). He also decreed the end of slavery in the Portuguese metropolis, ended the distinction between New and Old Christians, pioneered the status of teacher as a civil servant at the service of the State, modernized the University of Coimbra with scientific laboratories, among many other innovative political measures. Nonetheless, he used violent repressive methods against the nobility, disregarding their old privileges, against the Jesuits whom he had arrested and expelled, and against popular uprisings that did not agree with his reforms. He did not spare those, among the agents and advisors to the King, who disagreed with and tried to question his decisions or those of the enlightened Monarch – both of which were read as synonyms.

With the fall of the Marquis of Pombal in 1777, and more vividly after his death in 1782, divergent currents of interpretation and evaluation were asserted and counter-

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<sup>1</sup> Cf. Kenneth Maxwell, *Marquês de Pombal: O Paradoxo do Iluminismo*, Lisbon, Presença, 2001.

<sup>2</sup> This request was registered by Joel Serrão, "Repensar Pombal", in Maria Helena Carvalho dos Santos (coord.), *Pombal Revisitado*, vol. I, Lisbon, 1984, p. 353.

posed around this remarkable figure in the political history of the Age of Enlightenment, particularly throughout the 19<sup>th</sup> century and the first half of the 20<sup>th</sup> century. The historian Jorge Borges de Macedo classifies and characterizes the Pombaline hermeneutical currents as follows: “A first current has considered Pombal’s action as catastrophic for the country, which needs to be defended against rulers who share his nature or ideology. Another trend sees him as the precursor of anticlerical laicism: he would have, from this perspective, put his ‘finger on the wound’ related to the causes of Portugal’s decadence. Therefore, to remove this decay, it was necessary to ‘keep’ him. Practical problems, as the authors judge. A third current (in which Camilo Castelo Branco takes a courageous stand) believed that Carvalho e Melo should be ‘judged’ for his means of governing and for the content of his activities regarding their connection to morality”<sup>3</sup> (translated).

In any case, these three interpretive perspectives can be summarized in two currents diametrically in irreconcilable opposition. On the one hand, the philopombalists, unexpectedly coming from liberal, masonic, republican, socialist, positivist backgrounds – all of which were anti-Jesuit, who published biographies, pamphlets, speeches, and novels. In such productions Pombal was praised as a Prometheus of modernity, in addition to precursor of the liberties that would be the basis of contemporary democracy, as well as of the end of the Ancien Régime and the rise of liberal societies. On the opposite side, the antipombalists emerge, usually aligned with the Legitimist current and philo-Jesuit ultramontane Catholicism. In this case, Pombal is compared to Nero, an unscrupulous bloodthirsty usurper of the power and status of the King of Portugal to promote reforms that would be harmful to the solidity of the monarchy. His actions, from this point of view, constituted the remote cause of the loss of prestige and ruin of such a millenary regime that would have made Portugal the first global empire in Modernity in the face of European monarchies.

These controversial views contaminated both the historiographical production on the reign of D. José I and the vision of the identity of the Age of Enlightenment in Portugal. This view has reached our days and, when adopted uncritically, has prevented historians from making a balanced, unbiased, and non-judgmental analysis of the figure of Pombal and the significance of his political actions. These opposing views would have contributed

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<sup>3</sup> Jorge Borges de Macedo, “Dialéctica da sociedade portuguesa no tempo de Pombal”, in *Como Interpretar Pombal? No Bicentenário da Sua Morte*, Lisbon-Oporto, 1983, p. 15. Original version: “Uma primeira corrente tem considerado a ação de Pombal como catastrófica para o País, que precisa de ser defendida contra governantes da sua natureza ou ideologia. Outra toma-o como o precursor do laicismo anticlerical: ele teria, por essa via, posto o ‘dedo na ferida’ relacionada às causas da decadência de Portugal. Portanto, para remover essa decadência, era preciso ‘continuá-lo’. Problemas práticos, julgam os autores. Uma terceira corrente (onde toma posição corajosamente Camilo Castelo Branco) entendia que Carvalho e Melo deve ser ‘julgado’ quanto aos meios de governo que praticou e ao conteúdo da sua atividade, no que se refere à ligação desta com a Moral”.

to the establishment of a “party history” in Portugal – to use the definition of the historian Jorge Borges de Macedo –, which, over time, has reproduced a kind of court history that often subverts the ideal of building a renewed history, a history-understanding of the Enlightenment Age. Its focus has been Pombal’s role in the relationship with the countries that were formed from the Portuguese Empire, namely Brazil, and also with Europe, where the policies promoted by enlightened absolutism prevailed.

In fact, the Marquis of Pombal himself, as Minister, promoted a partisan policy around the production of memory, especially with the publication of works such as *Dedução Cronológica e Analítica e o Compêndio Histórico da Universidade de Coimbra* [*Chronological and Analytical Deduction and the Historical Compendium of the University of Coimbra*]. Through this historiographical investment, he established a Manichean vision of the past, dividing the fields between good and evil, between those responsible for building nations and those responsible for their decline. The past was, in fact, summoned to the “court of history” to substantiate the diagnoses of Portuguese backwardness and to legitimize the urgency of political reforms.

This book aims to help overcome this historiographical divide. It brings together a set of studies by a group of scholars who, given their areas of expertise, contribute to the knowledge of Pombal contextualized in the 18<sup>th</sup> century. From the point of view of different domains such as historiography, literature, politics, and even philately, the following chapters investigate the process of building the image of his figure and his political action in different historical periods in Portugal and in the culture of other countries that paid attention to the Prime Minister of D. José I. In doing so, they will contribute to a better and more complex historical understanding of this important and ambivalent historical figure.

*José Eduardo Franco,  
Luiz Eduardo Oliveira  
and Christine Vogel*



# METAMORPHOSES OF THE STATE AND CIVIL SOCIETY IN THE AGE OF ENLIGHTENMENT

VIRIATO SOROMENHO-MARQUES<sup>4</sup>

## INTRODUCTION

It is not possible to establish a consensus on the actual duration of the period of European and Western history that falls within the designation of the Age of Enlightenment. One is better equipped to state when it ends (somewhere between the death of the Prussian defendant, Frederick II, in 1786, or it surely makes no sense to speak of it after the French Revolution, which began in 1789) than when it begins (although sometimes historians choose 1715, the date of Louis XIV's death, as the year of a somewhat forced baptism). What can now deserve more agreement is the recognition that, during almost the entire 18<sup>th</sup> century, the Old Continent politically was a kingdom of eves. Demographic, economic, and social expansion was not followed by a modernization of institutions and the State, with the exception of the "limited monarchy", originated in the Glorious Revolution of 1688-1689, which had led to the aborting of the absolutist project of James II and the promulgation of the Bill of Rights.

This asymmetry between potentiality and reality was, to a large extent, the cleavage carried out by a bourgeois, mercantile, cultured, and entrepreneurial civil society and an aristocratic, traditionalist, and feudal political order.

Certainly, its image from the portrait the 18<sup>th</sup> century literature presents is infinitely richer and more polymorphous than this dichotomy. The dominant tone is that of enormous hope, a true passion for possibility well translated into the considerable density of theories and reflections woven around the categories of progress and multiple philosophies of history. Therefore, it is not surprising that, for so many inhabitants at the turn of the 20<sup>th</sup> to the 21<sup>st</sup> century, the 18<sup>th</sup> century shines as an oasis of trust in humanity, in contrast to our radical doubts about the sustainability of the future.

However, do not think that the continental societies of the 1700s lived submerged in an immobilist monarchic-absolutist lethargy, with their greatest intellectuals – such as Voltaire, Montesquieu, and Kant (until the 70s), just to mention the greatest – nostalgically

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<sup>4</sup> University of Lisbon, Portugal.

yearning for the mists of liberties of old Albion. The rhythm of the 18<sup>th</sup> century was not, in fact, divided between a long feudal *andante* and a violent revolutionary *molto vivace*. In fact, the revolution hardly was on the horizon and in the perspectives of all the protagonists of the different sides and social sectors in presence.

Civil society and the State moved themselves. Sometimes in convergence – shaping the spirit of reform that is the legitimate face of the philosophies of progress –, other times in opposition and fracture.

In this chapter, some of the determinants of the historical dynamism of the 1700s will be addressed. The theoretical-practical struggle for the rights of citizenship occupies a prominent place in this period. The chosen method involves the analysis of the thematic trilogy that appears as the subtitle to this essay.

## FREDERICK II'S TWO WORLDS

One can consider the Enlightenment, the *Aufklärung*, as a complex movement of epochal mentality, a true *Zeitgeist* (spirit of time) – in the sense of a conceptual structure capable of absorbing, identifying, and reflecting the self-consciousness of an entire society in a given moment. Consequently, enlightened despotism can be described as the set of reform attempts and trials carried out by the Ancien Régime State to adapt to new times, also seeking to gain a certain ability to anticipate and model its tendencies.

Speaking of enlightened despotism inevitably means approaching the thought and work of Prussia's greatest king, Frederick II the Great, whose long reign dominates the 18<sup>th</sup> century as an unavoidable point of reference (1740-1786).

Complex, like the work he contributed to develop, Frederick II was a plural personality who knew how to equate multiple and contradictory challenges. Although his military exploits have transported him into the matrix legend of Prussian-German patriotic militarism, this man, as an author, is a foreign writer for the German reader of middle culture. In fact, his native language was not German, but the archaizing French of the Gallic Huguenots, who had sought shelter in the principality of Brandenburg, shortly after the revocation of the Edict of Nantes. By irony of history, the king who would transform Prussia into the hinge of a powerful Germany, constant nightmare of France, was educated as a French nobleman of the 17<sup>th</sup> century, due to the intolerance policy of Louis XIV...

Sensitive to multiple appeals and influences, Frederick II was above all able to inhabit the two fundamental worlds of his time. Two worlds, so often separated, but which he knew how to unite, translating this unity into the concrete sphere of political decisions and interventions. Therefore, he was an interlocutor of the cosmopolitan, intellectual, and bourgeois circles of the “Republic of Letters” as the English translation from the French original wording: “République des Lettres”. In addition to being a shrewd strategist of a

*Realpolitik* dictated by the selfish calculation of the main dynastic houses, which the good Abbé de Saint-Pierre would try, in vain, to reconcile.

Consequently, in the political domain, the influence of Frederick II left its mark on the style of different leaders such as: Pombal (1750); Charles III of Spain (1759); Catherine II of Russia (1762); Gustav III of Sweden (1772); and Joseph II of Austria (1780)<sup>5</sup>.

## THE AUFKLÄRUNG AS PUBLIC POLICY

The death of Frederick William I, with the immediate enthronement of the young prince – on May 31, 1740 – gave Frederick the opportunity to advance in a completely different policy from that of the *King-Sergeant*, even though always thwarted by extremely difficult relations with his father.

In a letter to Voltaire, dated June 27, 1740, Frederick I shows his fidelity to his “two worlds”. The new monarch writes to the great *philosophe*:

First of all, I started by increasing the State forces by sixteen battalions, five squadrons of hussars, and one squadron of the royal guard. I laid the foundations for our new Academy. I acquired Wolff, Maupertuis, Algarotti (J’ai d’abord commencé par augmenter les forces de l’État de seize bataillons, de cinq escadrons de husards, et d’un escadron de gardes du corps. J’ai posé les fondements de notre nouvelle Académie. J’ai fait acquisition de Wolff, de Maupertuis, d’Algarotti)<sup>6</sup>.

Frederick II’s missive mirrors the double sign of Mars and Minerva of his politics. His bets on the military strengthening in Prussia, surrounded by great and ambitious powers on all sides. Moreover, he invests on the cultural transformation of the Prussian landscape with the contribution of the greatest cultural figures in Europe, in an orientation entirely in accordance with the cosmopolitanism of the monarch.

The first guideline of the new course, printed by the young king, is clearly shown in a letter Frederick addressed to the old and famous philosopher Christian Wolff, a week before his accession to the throne.

Despite the fact that he continued to call himself the *philosophe de Sans-Souci* in his private correspondence, Prince Frederick would diplomatically propose to the philosophers a kind of compromise, in which the eventual collaboration was based on the autonomy and detachment of the respective roles. Along these lines, the prince wrote:

It is the philosophers’ job to be the preceptors of the universe and the teachers of princes. They must think accordingly, and it is up to us to take consequential actions

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<sup>5</sup> François Bluche, *Le Despotisme Éclairé*, Paris, Fayard, 1987, p. 12.

<sup>6</sup> Frederick II, “Letter to Voltaire from June 17, 1740”, in *Oeuvres de Frédéric le Grand*, 30 vols., ed. J. D. E. Preuss, Berlin, Rodolphe Decker, 1846-1856 [vol. XXII, p. 12].

(C'est aux philosophes à être les précepteurs de l'univers et les maîtres des princes. Ils doivent penser conséquemment, et c'est à nous de faire des actions conséquentes)<sup>7</sup>.

The touchstone that would show Frederick II's constant fidelity to his tacit commitment to the intellectuals was linked to a narrow and scrupulous respect of the State for freedom of opinion and creation in all domains of spiritual life.

There are many examples of tolerance as an official policy, one that did not dictate the content of the Enlightenment, but rather created the framework conditions for its flourishing.

Let us briefly look at some examples:

a) Christian Wolff's Rehabilitation: Yielding to pressure from more conservative pietist circles, in which personalities such as Joachim Lange and August Hermann Francke pontificated, Frederick's father had expelled this distinguished philosopher from the University of Halle and Prussia in 1723. Frederick II restores him, with all honors, to his former University.

b) Hospitality even to opponents: The materialist La Mettrie and the permanent master of resentment, Rousseau – of whom Frederick II would necessarily have been a target – were generously welcomed by the King, despite theoretical and personal differences. On the other hand, Frederick II confessed that he did not understand Newton's work. Despite that, he accepted Voltaire's suggestion and appointed the philosopher Maupertuis President of the Berlin Academy of Sciences, known for having introduced Newtonism in France, which was still closely linked to the Cartesian physics of whirlpools.

c) Value and merit as the only criteria: Totally unaware of the nationalism and chauvinism that would devastate the intellectual world of Europe and Germany in the 19<sup>th</sup> century, Frederick II rebuilds the Berlin academy. His grandfather, Frederick I, with the contribution of Leibniz inaugurated the institution, whose reform included hiring for his four classes (Mathematics, Physics, Philosophy, and Fine Arts) the greatest figures in Europe at the time, without any national or religious discrimination.

d) Against religious fanaticism: The rapid aggrandizement of Prussia – which allowed it to become a kingdom in 1701, and shortly thereafter one of Europe's five key powers – would have been unthinkable without a tradition of asylum, to which Frederick II would remain faithful. As early as 1685, his great-grandfather, Frederick William, Elector of Brandenburg, had granted shelter to tens of thousands of French Calvinists. Casting serious doubts on the Hegelian version of Frederick II as a "hero of Protestantism" (*Held des Protestantismus*), he did not hesitate to receive thousands of Jesuits in his territory,

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<sup>7</sup> *Id.*, "Letter to Christian Wolff from May 23, 1740", in *Oeuvres de Frédéric le Grand*, 30 vols., ed. J. D. E. Preuss, Berlin, Rodolphe Decker, 1846-1856 [vol. IX, p. 179].

successively driven out of Portugal (1759), France (1764), and Spain (1767). This process culminated in the extinction of the Company, by bull of Clement XIV, on July 21, 1773.

e) Humanization of criminal law: A quarter of a century before Beccaria's work against the death penalty (1764), Frederick II expressed concerns about reducing its application, within the scope of a policy of humanitarian reform of the criminal law. The initiative was also able to spread to Russia, as the correspondence with Catherine II proves. The abolition of torture, decreed on June 3, 1740, was one of the first and fundamental steps in this process<sup>8</sup>. In a letter to the king, dated April 6, 1785, the Marquis of Condorcet praised Prussia's progress in the penal domain<sup>9</sup>. The very symbol of the *Aufklärung* in matters of criminal law, the Marquis Cesare Beccaria did not spare appreciative comments for the Prussian King for having, with the abolition of torture, stopped "a consecrated cruelty" (*una crudeltà consacrata*)<sup>10</sup>.

f) Expansion of cultural means to create a public space: In 1716 there were around 140 newspapers throughout Europe. In 1790, 247 were published in Germany alone, many of them in Prussia. The mood of tolerance and freedom of expression in the almost half-century of Frederick II's rule came to stimulate both the generalization of public and private education modalities. Consequently, leading to the alphabetization of practically half of the population at the turn of the century, as well as allowing the multiplication of communication tools at the service of more refined urban intellectual circles. As a result, one could witness the emergence of a truly enlightened public space centered on organized dialogue and multiplied by the printed word. Among the numerous editorial initiatives at the service of the Enlightenment, the *Allgemeine Deutsche Bibliothek* (1765-1806) by F. Nicolai and the *Berlinische Monatsschrift* (1783-1811) by Friedrich Gedike and Erich Biester stand out.

These and other policy measures Frederick II undertook would lead to a chorus of sympathy, although without reaching unanimity amongst European intellectuals. For instance, the monarch paid little attention to the Germanic language and cultural reality. However, even the Germans, such as Garve, Kant, Schaumann, Mendelssohn, Herder, and Goethe, pay their homage.

The Jewish thinker Moses Mendelssohn has well summarized reasons for this. He wrote, already very close to the end of the king's life:

I am fortunate enough to live in a State in which these concepts of mine [about tolerance and freedom of conscience] seem neither new nor extraordinary. The wise

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<sup>8</sup> *Id.*, *Oeuvres de Frédéric le Grand*, 30 vols., ed. J. D. E. Preuss, Berlin, Rodolphe Decker, 1846-1856 [vol. IX, p. 29, note by Preuss].

<sup>9</sup> *Id.*, *Ibid.*, vol. XXV, p. 378.

<sup>10</sup> Cesare Beccaria, *Dei Delitti e delle Pene. Edizione Nazionale delle Opere di Cesare Beccaria*, ed. L. Firpo, vol. I, Milano, Mediobranca, 1984, § XVI, p. 66.

regent, by whom it is governed, has permanently manifested, from the beginning of his reign, his aim to invest humanity in its full right in matters of faith (Ich habe das Glück, in einem Staat zu leben, in welchem diese meine Begriffe weder neu, noch sonderlich auffallend sind. Der weise Regent, von dem er beherrscht wird, hat es, seit Anfang seiner Regierung, beständig sein Augenmark seyn lassen, die Menschheit in Glaubenssachen, in ihr volles Recht einzusetzen)<sup>11</sup>.

## A THEORY OF CITIZENSHIP SILENCED BY ETHICAL PROXY

However, what conceptions of political philosophy underlie the tolerant political conduct of the monarch? What did he think about the role of the State and its relations with citizens?

Frederick II places his views on the formation and role of the State and political power within the classical currents of natural law and the social contract. One ought to notice the mark of Grotius, Pufendorf, Locke, and Wolff, which translates into a clear rejection of all theories of the divine origin of political power, as well as the presence of globally secular and secular conceptual references.

His central thesis seems to clearly locate him in the area of Samuel Pufendorf's double contractualism. This thinker developed a distinction between the "union pact" (*pactum unionis/Gesellschaftsvertrag*) and the "act or contract of submission" (*pactum subjectionis/Unterwerfungsvertrag*) in his main work – *On Natural Law and Peoples (De Jure Naturae et Gentium, 1672)*. Through the first contract, voluntary and unanimous, society emerged. The second, by majority, led to the creation of the State and its respective political regime<sup>12</sup>.

The doctrine of the double contract was not without serious difficulties, which authors of different orientations denounced. In either case, this theoretical option points to a contractualist model, given its tendency to be more concessive than the absolute and unconditional transfer of power from the people to the sovereign. This model, therefore, provided a relative share of power between the head of State and the people.

At least in one respect, Frederick II would agree with Pufendorf and disagree with Hobbes: even after the contract, legitimately validity to subsequent generations, the people do not seem to lose their legal personality; they do not seem condemned to fragment into atomized individuals who, if put together, do not form more than a "rude crowd".

Frederick II elaborates a conception of contract within the horizon of natural equality, that is, the head of State was one among equals. In this sense, the choice of the sovereign

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<sup>11</sup> Moses Mendelssohn, *Jerusalem (1783)*, in *Gesammelte Schriften – Jubiläumsausgabe*, reprint of Berlin – 1929, ed. F. Bamberger *et al.*, vols. VI, 1, e VIII, Frommann (G. Holzboog), 1971 [vol. VIII, p. 146].

<sup>12</sup> *Id., Ibid.*, tome II, book VII, chapter II, §§ 7 and 8.

is not equivalent to the loss of natural rights that, under the Prussian king's pen, seem to gain shades of inalienable prerogatives. This is, undoubtedly, an element of vital importance for the development of the Enlightenment, as well as of the freedom to think. The monarch writes about this:

If we go back to the origin of society, it becomes evident that the sovereign has no right over the way the citizens think. It would not be necessary to be insane to imagine that men said to a fellow man: Do we raise you above us because we like to be slaves, and do we give you the power to direct our thoughts to your will? (Si l'on remonte à l'origine de la société, il est de toute évidence que le souverain n'a aucun droit sur la façon de penser des citoyens. Ne faudrait-il pas être en démente pour se figurer que les hommes ont dit à un homme leur semblable: Nous vous élevons audessus de nous, parceque nous aimons à être esclaves, et nous vous donnons la puissance de diriger nos pensées à votre volonté?)<sup>13</sup>.

One should not think, however, that the recognition of a sphere of rights inherent to subjects, whom the State could not harm, is accompanied by any document of a legal nature, close to what we could call a Bill of Rights, as it was the case in England after the fall of James II.

In his youth, Frederick II had been fascinated with the "English liberties", as it was common among continental intellectuals of the time. Nonetheless, he seemed as certain as Rousseau was in *The Social Contract* that "infamous corruption" (*corruption infâme*) invaded the House of Commons. With remarkable consistency regarding his ideas as crown prince, Frederick II fully justifies his epithet of enlightened despot. Indeed, the disbelief in the larval and crude forms of political representation available in the narrow horizon of comparative politics of the time led the king to focus even more on himself, on the person of the sovereign, and on the demands and responsibilities of governance.

Such a conception leads to a despotism of ethical hues. The monarch concentrates all the power and the maximum responsibility in his own hands. He does not represent the subjects, but is given unlimited power of attorney before which they do not have any kind of supervision and control mechanism. The only "guarantee" the sovereign gives is that he will use his unlimited powers with moderation and restraint.

Regarding these ideas, the young prince wrote:

The most precious trust that is entrusted to the hands of princes is the lives of their subjects [...] Good princes consider this unlimited power over the lives of their subjects as the heaviest weight of their crown [...] (Le dépôt le plus précieux qui soit confié entre les mains des princes, c'est la vie de leurs sujets [...] Les bon princes

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<sup>13</sup> Frederick II, "Essai sur les formes de gouvernement et sur les devoirs des souverains (1777)", in *Oeuvres de Frédéric le Grand, Op. Cit.*, vol. IX, p. 207.

regardent ce pouvoir non limité sur la vie de leurs sujets comme le poids le plus pesant de leur couronne[...])<sup>14</sup>.

Or again, emphasizing the almost superhuman predicates of the sovereign's tasks and responsibilities:

Sovereigns [...] are like the soul of their States: the burden of their government weighs on them like the world on Atlas's back (Les souverains [...] sont comme l'âme de leurs États: le poids de leur gouvernement pèse sur eux seuls, comme le monde sur le dos d'Atlas)<sup>15</sup>.

The sovereign's relationship with the people, whose lives and rights depend on him, clearly has paternalistic contours. At the core of his conception of despotism, one can see the attempt to reconcile the sovereign's political transcendence, typical of absolutism, with the demand for transparency from the Enlightenment. The balance of this impossible mission was reflected in the emphasis on the existence of a simple moral bond, rather than a legal obligation, when the sovereign explained his policy towards the people.

If social strata and classes or individual subjects are incapable of representing themselves, then it is the king who has to put himself in their place, especially that of the most humble and defenseless, through a curious exercise of alterity, with a clearly ethical-political intention.

Frederick II writes, formulating a kind of imperative suited to his conception of ethical power of attorney:

What would I want from the sovereign if I had been born into the class of those citizens, whose [only] capital is their arms? (Si j'étais né dans la classe de ses citoyens dont les bras sont le capital, que désirais-je du souverain?)<sup>16</sup>.

The king considered himself "the first servant and the first magistrate of the State" (*le premier serviteur et le premier magistrat de l'État*)<sup>17</sup>. With a firm hand, he directed the State in a struggle for power, but also for survival in the harsh wars that the blind mechanism, above good and evil, of the European "power balance" forced. The war, the security of the state against external enemies, was the sovereign's main task, as per Frederick II. To fulfill it, he commanded the Prussian armies himself in 15 of the greatest battles of the 18<sup>th</sup> century. Due to the effectiveness of the State, the king did not hesitate to consider

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<sup>14</sup> *Id.*, "L'anti-Machiavel (1740)", in *Oeuvres de Frédéric le Grand, Op. Cit.*, chapter IX, p. 136. The highlighted excerpt corresponds to a suppression suggestion Voltaire recommended.

<sup>15</sup> *Id.*, *Oeuvres de Frédéric le Grand, Op. Cit.*, chapter XXII, p. 204.

<sup>16</sup> *Id.*, "Essai sur les formes de gouvernement et sur les devoirs des souverains (1777)", in *Oeuvres de Frédéric le Grand, Op. Cit.*, vol. IX, p. 205.

<sup>17</sup> *Id.*, *Ibid.*, vol. I, p. 123.



his ministers as mere “utensils in the hands of a wise and skillful master” (*outils dans les mains d’un sage et habile maître*). Due to the stability of the state’s military structure, Frederick II even abdicated from carrying out social reforms, such as the abolition of peasant serfdom (the *Leibeigenschaft*), to commit to the *Junker* aristocracy, which would last practically until 1945.

Alexis de Tocqueville excellently understood and expressed the limits of Frederick II’s project of enlightened despotism in a commentary on the para-constitutional character of the Prussian Civil Code (*Allgemeines Landrecht*) of 1794. It is a legal institute, entirely inspired by Frederick II, published only eight years after the death of its creator.

Tocqueville masterfully exposed all of the following elements: the hybrid and unsustainable mixture of liberal and authoritarian elements; the subversion of a theory of political representation in favor of a moral power of attorney placed in the hands of the sovereign; the transformation of the king into the head of State, in addition to the only active agent and citizen.

The author of *De la Démocratie en Amérique* [*On Democracy in America*] writes about the clash of principles in Frederick’s Civil Code:

[...] the legislator [...] considers the prince as the sole representative of the State and gives him all the rights that have just been recognized in society. In this code, the sovereign is no longer the representative of God, he is only the representative of society, its agent, its servant [...], but he represents it alone. ([...] le législateur [...] considère le prince comme le seul représentant de l’État, et lui donne tous les droits qu’on vient de reconnaître à la société. Le souverain n’est plus dans ce code le représentant de Dieu, il n’est que le représentant de la société, son agent, son serviteur [...] mais il la représente seul)<sup>18</sup>.

## THE BALANCE OF DESPOTISM

Frederick II’s Prussia did not survive the disappearance of its creator more than two decades. Its military and territorial grandeur would collapse before the Napoleonic troops. However, the events were not limited to Prussia. They included the failure of despotism, the slow divorce between the absolutist State, capable of admitting only a few shallow reforms, and the social forces identified with the emancipatory hopes of the Enlightenment. This failure took place all over Europe:

– In Portugal, with the death of D. José I in 1777, the Marquis of Pombal is removed from his position and his work is interrupted.

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<sup>18</sup> Alexis de Tocqueville, *L’Ancien Régime et la Révolution. Oeuvres Complètes*, vol. I, Paris, Calmann-Lévy Éditeurs, 1856, p. 337.

– In Spain, Carlos III dies in 1788 before the Tax and industrial reforms could be fully carried out.

– In Austria, Joseph II ended up displeasing all social classes and protagonists: the Church, for his ideas; the nobles, for the defense of peasant emancipation; the latter, due to the fact that the price of emancipation was compulsory military service and the payment of heavy taxes.

– In Russia, the good will Catherine II showed, namely in the reform of the obsolete imperial justice system, did not save her from the harshest peasant uprisings in Russian history during her reign (1774-1775).

The sympathy of intellectuals towards Frederick II was not unconditional or uncritical. Kant is one example. He somehow absolved the excess of power concentration in the hands of Frederick II, claiming that he used it to transform his regime into a kind of republican autocracy; nevertheless, Kant did not make any concessions to the intrinsic evils of despotism as a way of thinking and managing the State.

The Kantian contestation of despotism is carried out under the argument of a clear defense of citizenship. Very close to Diderot's diagnosis – for whom even the government of a good despot was bad because it disarmed and demobilized subjects for behavior guided by an arbitrary will rather than by the law – Kant also accuses the despotism of limiting the men under his government to the passivity of subjects.

Indeed, in order to be a citizen, it is necessary to participate in public life, a possibility that despotism curtails. Kant accuses autocratic governments of objecting the members of political society to a political minority. It can only be attributed to the external authority of an "autocrat" (*Selbstherrscher*), who, by concentrating all State powers in his jurisdiction, alienates individuals from their status as "citizens" (*Bürger*), making them merely passive entities and simple "subjects" (*Unterthanen*)<sup>19</sup>.

Refusing to see his subjects as citizens, the despot does not understand his country as a "fatherland", but as "heritage" that must be preserved and extended. On the other hand, the excessive and arbitrary concentration of power in the hands of the despot removes from the monarchical State the characteristic of a living organism, which only the participation and reciprocal action of citizenship would allow. It becomes a cold machine with no life of its own.

Kant writes in another text that would only be published posthumously:

In the monarchy, the State comprises the organism, which presupposes a life in the body of the State; a despotic government transforms the monarchy into a mechanism, which always depends on a someone else's hand (Der Staat enthält

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<sup>19</sup> Immanuel Kant, *Vorarbeit zu TP. Gesammelte Schriften*, vol. 23, Berlin, Deutsche Akademie der Wissenschaften zu Berlin, 1902-, p. 138.

in der monarchie den organismus, der ein leben im Staatskörper voraussetzt; die despotische regirung verändert sie in den mechanismus, der immer von fremder Hand abhängt)<sup>20</sup>.

This mechanism, without an internal life and totally dependent on an external manipulation, feeds on fear as a fundamental energy. In this sense, Kant adds:

In the mechanism [of the despotic State] no good will is presupposed, but simply fear (Beym Mechanismus wird kein guter Wille mehr vorausgesetzt sondern bloss die Furcht)<sup>21</sup>.

## KANT AND THE AUFKLÄRUNG AS THE CONSTRUCTION OF A PUBLIC SPACE

The Kantian conception of the essence of the Enlightenment is spread throughout his work. The high and condensed moment, however, coincides with the 1784 essay: *Answer to the Question: What is the Enlightenment? (Beantwortung der Frage: Was ist Aufklärung?)*. In this text, Kant pays public homage to the monarch Frederick II, two years from the end of his long reign. The persecutions to which the aged philosopher would be subjected during the obscure and intolerant rule of Frederick-William II pointed out the objective reasons for the gratitude of Kant and of so many European intellectuals to the Prussian king. This homage, however, did not inhibit the *Königsberg* philosopher, as previously discussed, from a severe criticism of despotism as a system of power. It also did not stop him from reducing the role that should be expected of the State under the rule of *Aufklärung* to a modest dimension.

In fact, the Kantian emphasis in the analysis of the Enlightenment is directed towards individual responsibility, in addition to the need for a process of public space creation within society so it can be fully understood and adopted. The requirement is for a place of independent critical exercise, in the interdependence of the crossing lines and maturation of dialogue capacity.

The notion of process, in solidarity with that of progress, is strategic in the Kantian treatment of the Enlightenment. They are not a result, a set of stable and well-determined acquisitions. The essence of Enlightenment, rather, lies in feeding a movement, a dynamism, an openness to possible futures. The philosopher writes:

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<sup>20</sup> *Id.*, Refl. 7688, in *Gesammelte Schriften*, vol. XIX, Berlin, Königliche Preussische Akademie der Wissenschaften, depuis Preussische Akademie der Wissenschaften, p. 491.

<sup>21</sup> *Id.*, Refl. 7700, in *Gesammelte Schriften, Op. Cit.*, vol. XIX, p. 494. On despotism and mechanism, see further: *Id.*, KU: §59, in *Gesammelte Schriften, Op. Cit.*, vol. V, p. 352.

If you now ask yourself: are we currently living in an enlightened age? One must answer: no. But we live in an age of [expansion of] enlightenment. (Wenn denn nun gefragt wird: Leben wir jetzt in einem aufgeklärten Zeitalter? so ist die Antwort: Nein, aber wohl in einem Zeitalter der Aufklärung)<sup>22</sup>.

In an attempt to cover the most significant aspects of Kant's reflection on the construction of public space – the only one suitable for the flourishing of the tasks of the epochal process of enlightenment –, we can highlight three fundamental levels:

- Individual responsibility.
- Freedom for the public use of reason.
- The special role reserved for philosophers, both institutionally and individually.

Each of these vectors is explored hereinafter.

a) Individual responsibility. In addition to all its political constraints, the Enlightenment constitutes an enormous personal challenge, implying the task launched to each member of the community regarding the ability to think for themselves, overcoming the temptation to accept the prevailing ideas and prejudices.

It is not surprising that the prelude to the 1784 text constitutes both a denunciation and an appeal; the denunciation of a voluntary immature behaviour and the appeal to boldness and authenticity of thought:

The Enlightenment is a man's way out of the state of immaturity, for which he himself is responsible. Immaturity is the inability to use one's own understanding without the direction of another [...] Sapere aude! Have the courage to use your own understanding! Here's the motto of the Enlightenment (Aufklärung ist der Ausgang des Menschen aus seiner selbst verschuldeten Unmündigkeit. Unmündigkeit ist das Unvermögen, sich seines Verstandes ohne Leitung eines anderen zu bedienen [...] Sapere aude! Habe mut, dich deines eigenen Verstandes zu bedienen! ist also der Wahlspruch der Aufklärung)<sup>23</sup>.

Along the same lines, more than a decade later, Kant does not hesitate to consider the Enlightenment, stressing again personal responsibility as “the most important revolution within man” (*die wichtigste Revolution in dem Innern des Menschen*)<sup>24</sup>.

For the full exercise of their personal responsibility in the Enlightenment process, each one must know how to make a capital distinction in the use of their reason.

This is the difference between “private use” (*Privatgebrauch*) and “public use” (*öffentlicher Gebrauch*) of reason. This distinction places us directly in the political terrain of citizen-

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<sup>22</sup> *Id.*, “Aufklärung”, in *Gesammelte Schriften, Op. Cit.*, vol. VIII, p. 40.

<sup>23</sup> *Id.*, *Ibid.*, p. 35.

<sup>24</sup> *Id.*, *Anthropologie*, in *Gesammelte Schriften, Op. Cit.*, vol. VII, p. 229.

ship. As citizens, we must be able to make a difficult and even sensitive equation; on the one hand, between the duty of obedience to the government, within our performance of public offices (in the private use of reason) and, on the other hand, our duty of loyalty to ourselves and to our fellow citizens, which must lead us, in the context of the public use of reason, to the critical exercise of thinking, even to the point of expressing disagreement with the political guidelines of governments (and churches).

b) Freedom for the public use of reason. Individual responsibility for thinking is not exercised in a vacuum. It projects itself and gains meaning in a public space, which, in turn, needs this individual risk capacity to exist.

Thinking for oneself has nothing in common with the ostentation of individualism, with the apology of solipsism. To Kant, the analysis of the essence of thinking does not consist fundamentally on highlighting – as Spinoza and Mendelssohn claim – that the intimate nature of this act frees it from any and all tutelage, prevents it from rendering allegiance to any external authority. In thought, only freedom is authentic, although objective conditions can force individuals, as was the case with pseudo-conversions during religious persecutions to simulate insubstantial convictions.

Concerning the act of thinking, Kant considers essential the dialogue, the communication of our opinion to a wider public of readers, and the confrontation with the opinion of others. This means that the center of thinking has a double nature, and the public dimension of interdependence is to be highlighted in both.

First, as a matter of knowledge, thinking is a public act in which opinions are confronted, based on reasons and arguments, in addition to being assessed in terms of their validity; all in the pursuit of a constructed consensus. Second, the public configuration of thinking gives it an immediately political character. Positively or doctrinally conditioning thought seems to be an attribution that goes beyond the prerogatives and effective powers of the State, but this can negatively condition the public space where the multiple expressions of thinking take place.

Therefore, the State also has an inherent responsibility to allow the free circulation of ideas. To that extent, underlining the political aspect of what is at stake, the distinction between freedom of thought and freedom of expression is useless and equivocal.

In essence, thinking and communicating are the same thing. Thinking is always addressing the other, it is always speaking out loud, which can be the victim of an aggressive intervention by the State.

Kant writes:

One can perfectly say that the external authority which deprives men of their freedom to publicly communicate their thoughts also deprives them of their freedom to think (Also kann man wohl sagen, dass diejenige Äussere Gewalt welche die Frei-

heit, seine Gedanken öffentlich mitzuteilen, den Menschen entreisst, ihnen auch die Freiheit zu denken nehme)<sup>25</sup>.

The State must guarantee, through its absence of intervention, the free maintenance of the communication circuits of the public space. These areas are where the different public uses of citizenship intersect, which are a fundamental modality of participation in political life and active citizenship.

c) The role of philosophers. Kant has no illusions about the feasibility or usefulness of fostering the renewal of the Platonic project regarding the relationship between power and philosophy.

The exercise of power leans towards passionate partiality; meanwhile, the universalist vocation of philosophy seeks impartial and free judgment. Both end up, given their different nature, inviting a clear separation of roles. If the philosopher abdicates the direct exercise of power and if he does not intend to compete with kings and rulers, he cannot renounce the specific way of exercising his responsibilities as a citizen.

The philosopher, as a citizen, and the faculties of philosophy as public teaching and research institutions must enjoy full freedom to carry out their activities. Philosophers constitute a critical reserve of nations. Their critical thinking should not be seen by governments as a threat, but rather as a precious constructive resource.

In this sense, Kant claims:

Therefore, the faculty of philosophy shall, [...] to this extent [while guaranteeing and exercising the search for truth], be regarded as free and subject only to the legislation of reason and not to that of government (Also wird die philosophische Fakultät [...] in so fern als frei und nur unter der Gesetzgebung der Vernunft, nicht der der Regierung stehend gedacht werden müssen)<sup>26</sup>.

Kant goes further and compares the role and place of philosophy to that of a left opposition party in parliament. The political-parliamentary metaphor not only accounts for the mission of the radical and free criticism under the responsibility of philosophers and philosophy; it also reveals Kant's rich dialogic conception of society and political life, whose vitality implies the renunciation of monolithism and forged unanimity. Rather, it demands the ability to constructively integrate disagreement in the rectification of errors in favor of the truth, which in politics coincides with the affirmation of freedom as a cornerstone of the search for the common good.

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<sup>25</sup> *Id.*, *Denken orientieren?*, in *Gesammelte Schriften, Op. Cit.*, vol. VIII, p. 144.

<sup>26</sup> *Id.*, *Streit*, in *Gesammelte Schriften, Op. Cit.*, vol. VII, p. 27.

## THE MULTIPLE DIMENSIONS OF CIVIL SOCIETY

However, one should not think that the potentialities of citizenship were only expressed in relations with the State. Conversely, the awareness of the political rights of citizenship was strengthened in the process of formation and consolidation of civil society.

Within civil society, two facets deserve special attention, given their direct and indirect political importance: economic reality and secret associativism.

The development of economic science in the 18<sup>th</sup> century should not be separated from some contributions of the previous century. Let us remember that John Locke, in the same work in which he exposes his particular view of contractualism, introduces his theory of labor as the first cause of property rights. Now, if we take into account that, according to Locke: “[...] Government has no other end but the preservation of Property”<sup>27</sup>, we will certainly be in a position to understand the political weight of a sphere that is not directly political, such as that of work and economic activity.

Labor constitutes property as the core of the interests that give substance to civil society and matter to the performance of the functions of the State. Men decide to build perpetual political associations, instituting the arbitral power of the State because of the growth of wealth and the interests associated with it, and not only because of the fear of death.

However, a century before Rousseau cast suspicion on the conditions of the effective equality of the participants in the social contract, James Harrington established a link between the model of property sharing and the type of the existing political regime.

In other words, Harrington did not believe in the neutrality of the State in the face of conflicts of interest in the economic sphere of civil society. Anticipating Marxism, not only in the general conception, but even in the concepts used, this author, who lived in the troubled period of the English Revolution, considers that the economic sphere of property constitutes “the foundations of a government”, while the regime and political institutions constitute the “superstructures of government”.

Formulating a cause-and-effect relation between the model of property distribution in the economic infrastructure of civil society and the classical regime types, the “superstructures of government”, Harrington writes:

But property in land, according to the distribution that happens to be of the same, causes the political balance producing empire of the like nature: that is, if the property in lands be so diffus’ed thro[ugh] the whole people that neither one landlord, nor a few landlords overbalance them, the empire is popular. If the property in lands be so ingrosted by the few, that they overbalance the whole people, the empire is

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<sup>27</sup> John Locke, *Two Treatises of Government*, ed. Peter Laslett, Cambridge/London/Sydney, Cambridge University Press, 1980, chap. VII, § 94, p. 347.

aristocratical, or mix'd monarchy; but if property in lands be in one landlord, to such a proportion as overbalances the whole people, the empire is absolute monarchy. So the political balance is threefold, democratical, aristocratical and monarchical<sup>28</sup>.

The economic structure of civil society, particularly at the metonymic level of the distribution of property, contributed to the formation of divergent interests. On the contrary, and despite the profound restrictions on freedom of association, typical of the authoritarian and absolutist regimes of the 18<sup>th</sup> century, civil society produced a myriad of clandestine associative movements, the most significant of which, coming from England, was that of masonry.

In the book that most penetratingly analyzes the fundamental questions of masonry, the German writer and philosopher Lessing considers it the result of the action of a centripetal force, existing within civil society, aiming to compensate the centrifugal forces that lead it to fragmentation. Lessing describes the Masons as those men desirous of exceeding the limits imposed by “patriotism” (*Patriotismus*), by “religion” (*Religion*), and by “social greatness” (*bürgerliche Hoheit*).

Lessing wrote, through his character Falk, that the intention of masonry was:

[...] to receive into their order any worthy man with the necessary aptitude, without distinction of country, religion or social status ([...] jeden würdigen Mann von gehöriger Anlage, ohne Unterschied des Vaterlandes, ohne Unterschied der Religion, ohne Unterschied seines bürgerlichen Standes, in ihrem Orden aufzunehmen)<sup>29</sup>.

This beautiful intention did not prevent masonry, as Lessing recognizes, from only partially carrying out its program, in an allusion to at least the segregation of Jews.

In essence, the masonry project contrasted sharply with the society of feudalism, aiming to promote a rapprochement between social groups and classes, corresponding to the cosmopolitan values of the modern world and an increasingly open market economy. It was a profoundly rationalist program, hidden in an organizational and initiatory secrecy dictated, at least partially, by the fear of political repression, except for cases, as with Frederick II's Prussia, in which the king himself was a member of masonry...

In much of the Old Continent, the network of masonic lodges operated on the fringes of the State, defending itself against it. It worked as a semi-clandestine substitute for the transparent and open society to which only a legally recognized and politically active citizenship could pave the way.

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<sup>28</sup> James Harrington, “Of popular government”, in *Works – The Oceana and Other Works, with an Account of His Life by John Toland*, Book I, Aalen, Scientia Verlag, 1963, chap. XI, p. 270.

<sup>29</sup> Gotthold Ephraim Lessing, *Ernst und Falk – Gespräche für Freimäurer*, *Gotthold Ephraim Lessing Werke*, ed. H. G. Göpfert, vol. 8, München, Carl Hanser, 1979, p. 470.



# ON THE USES OF THE PAST BY THE MARQUIS OF POMBAL: THE HISTORY OF MEDIEVAL PORTUGAL IN THE *DEDUÇÃO CRONOLÓGICA E ANALÍTICA*...

FILIPPE ALVES MOREIRA<sup>30</sup>

The aim of this article is to analyze the most relevant passages devoted to the history of medieval Portugal in one of the texts written under the aegis of the Marquis of Pombal (Sebastião José de Carvalho e Melo, 1699-1782)<sup>31</sup>, the *Dedução Cronológica e Analítica*<sup>32</sup> (hereafter *Dedução*). By doing so I will show how the uses of the past, even the most remote one, were strategic in mid and late 18<sup>th</sup> century political debates in Portugal. Even though this is a very well-known text, to my knowledge, there is still no work specifically dedicated to this subject.

The *Dedução*... was originally published in three volumes between 1767 and 1768<sup>33</sup>. It appeared under the authorship of José Seabra da Silva, a jurist formed at the University of Coimbra who spent most of his career working at the highest courts of the Kingdom and was also a member of the Council of State and the main person responsible for the national archive (the “Torre do Tombo”). He was an influential politician during most of Pombal’s consulate<sup>34</sup>. The real authorship of the text remains, however, debatable, and most critics believe that it was actually written by Pombal himself or by a number of authors writing under his orders. There are, in fact, several contemporary statements

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<sup>31</sup> Sebastião José de Carvalho e Melo was made the first Marquis of Pombal by King José I in 1769. There are several recent biographies of the Marquis of Pombal. See, for example, Kenneth Maxwell, *O Marquês de Pombal. Ascensão e Queda*, Lisbon, Manuscrito, 2015; Pedro Sena-Lino, *De quase nada a quase Rei*, Lisbon, Contraponto, 2020; a brief and updated synthesis in Andreia Lopes Fidalgo, “O Marquês de Pombal: Um reformador?”, in R. L. Jesus and P. M. Dias (eds.), *Atualizar a História: Uma Nova Visão sobre o Passado de Portugal*, Lisbon, Desassossego, 2022.

<sup>32</sup> I use modern spelling when referring to this book.

<sup>33</sup> José de Seabra da Silva, *Dedução Cronológica e Analítica*, Lisbon, Oficina de Miguel Manescal da Costa, 1767-1768.

<sup>34</sup> Miguel Gorjão-Henriques, “José de Seabra da Silva e a sua família: Iconografia e mobilidade social no Antigo Regime”, *Direito e Justiça*, vol. 2, special number, 2013, pp. 77-155.

attributing to Pombal the authorship of this text, and Seabra himself admitted in a letter to a friend that the only thing he had given to it was his name. Since this was said in a private letter, there are no reasons for doubting his words. There is also one extant manuscript with notes and commentaries written by Pombal that proves that he played an important role in its composition<sup>35</sup>. In any case, it is certainly a text that reflects his ideas.

The *Dedução* is a polemic work whose goal is to defend several political theses. The first volume is a demonstration of the damages that the Jesuits provoked in the Kingdom of Portugal, from 1540 (when they first arrived in Portugal) onwards. The second volume focuses on the relationship between the Church and the Monarchy, with special emphasis on the negative action of the Jesuits, and the third one is a collection of documents and other materials that were used in the former volumes. It is, therefore, a piece of anti-Jesuitism, the most remarkable of all the works belonging to Pombal's ideological and political campaign against the Society of Jesus. It was republished soon after in five volumes<sup>36</sup>, and it was translated into several languages, including an abbreviated translation into Chinese ordered by Pombal himself<sup>37</sup>. It had a big influence on anticlericalism during the second half of the 18<sup>th</sup> century, the 19<sup>th</sup> and even the 20<sup>th</sup> century. The years surrounding its composition were marked by conflicts between Portugal and the Holy See and by the expulsion of the Jesuits from Portugal, which occurred in 1759<sup>38</sup>. The *Dedução* was intended not only as a justification of the Jesuits' expulsion but also as an incentive for other European Kingdoms and the Holy See to follow the same politics<sup>39</sup>.

Though not strictly a historiographical text, the *Dedução* relies heavily on historical arguments in order to support its theses and sometimes follows a chronological structure. Since its main theme is the actions of the Jesuits, most of the text deals with events which occurred from the mid-16<sup>th</sup> century onwards. There are, however, some events of Portugal's medieval history the interpretation of which plays an important role in the

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<sup>35</sup> On these questions, see, among others, Guilmar Araújo Alvim, *Linguagens do Poder no Portugal Setecentista: Um Estudo a partir da Dedução Cronológica e Analítica*, Phd Thesis presented to the Universidade Federal Fluminense, Niterói, Niterói, policopied texto, 2010: <https://www.historia.uff.br/stricto/td/1388.pdf> (consulted online on June 22, 2021), and José Eduardo Franco, "Os catecismos antijesuíticos pombalinos. As obras fundadoras do antijesuitismo do Marquês de Pombal", *Revista Lusófona de Ciência das Religiões*, no. 7/8, 2005, pp. 247-268.

<sup>36</sup> José de Seabra da Silva, *Op. Cit.* This is the edition I use.

<sup>37</sup> The existence of this translation can be explained by the traditional presence of the Jesuits in China. See Pierre-Antoine Fabre *et al.*, "The dynamics of anti-jesuitism in the history of the Society of Jesus", *Jesuit Historiography Online*, 2016: [http://dx.doi.org/10.1163/2468-7723\\_jho\\_COM\\_192530](http://dx.doi.org/10.1163/2468-7723_jho_COM_192530) (consulted online on June 22, 2021).

<sup>38</sup> Nuno Gonçalo Monteiro, *D. José*, Lisbon, Círculo de Leitores, 2006, pp. 134-152.

<sup>39</sup> As for Pombal's diplomatic efforts on this question, see S. Gatzhamer, "Antijesuítismo europeu: Relações político-diplomáticas e culturais entre a Baviera e Portugal (1750-1780)", *Lusitania Sacra*, 2<sup>nd</sup> serie, vol. 5, 1993, pp. 159-250.

text's argumentation. Contrary to what happened with 16<sup>th</sup> and 17<sup>th</sup>-century history, the authors of the *Dedução* did not use many sources for medieval history. In what concerns historiographical texts, they relied mostly on 16<sup>th</sup> and 17<sup>th</sup>-century works, namely the Chronicles and Histories of the Portuguese Kings written by Duarte Nunes de Leão<sup>40</sup> and António Brandão<sup>41</sup> and the Chronicle of Spain written by Estevan de Garibay<sup>42</sup>. They sometimes refer to the Chronicles of the old Kings of Portugal but give no specific information about them, except for the Chronicle of Afonso III written by Rui de Pina ca. 1515 which is the only medieval or late medieval chronicle they cite<sup>43</sup>. This chronicle was first published, along with several other old Portuguese chronicles, by Miguel Lopes Ferreira in 1728, but the authors of the *Dedução* were probably using a manuscript version since they do not mention Pina's name. In what concerns historiographical texts, the *Dedução* is not, therefore, a particularly erudite text. Besides historiographical texts, its authors use medieval laws, mostly through the so-called *Ordenações Afonsinas*, the first official Portuguese law compilation, which dates from the mid-15<sup>th</sup> century and includes laws from the 13<sup>th</sup> century onwards, but remained in manuscript form (they would be published for the first time in 1792, soon after the end of Pombal's consulate).

The overall image of the Middle Ages as presented by the *Dedução* is a contradictory one. This is due to the polemic nature of the text, that sometimes provokes incoherencies depending on what theses are being defended. Thus, at the beginning of part 1, the *Dedução* presents the Portuguese Middle Ages as a splendid time in which arts, literature and commerce flourished, royal power was strong and prestigious, the Church and the Crown had their own sphere of influence and some charismatic figures (like Kings Duarte [r.1433-1438], Afonso V [r.1438-1481] and João II [r. 1481-1495] and Prince Henrique [1394-1460]) played influential roles in politics and society<sup>44</sup>. However, at the beginning of part 2<sup>45</sup>, a summary of the relationships between European monarchies and the Church from the 4<sup>th</sup> century onwards is presented, and there we are told that those were ignorant and obscure times. The reason for the first statement was that, in order to sustain Portugal's decadence after and due to the Jesuits' entrance in the Kingdom, the *Dedução* needed to create an image of splendor for previous times. There are also statements on the traditional fidelity of the Portuguese to their kings and some examples of medieval

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<sup>40</sup> Duarte Nunes de Leão, *Primeira Parte das Chronicas dos Reis de Portugal Reformadas*, Lisbon, Pedro Craesbeeck, 1600.

<sup>41</sup> António Brandão, *Terceira Parte da Monarchia Lusitana*, Lisbon, Pedro Craesbeeck, 1632.

<sup>42</sup> Estevan de Garibay y Zamalloa, *Los XI Libros d'el Compendio Historial de las Chronicas y Vniuersal Historia de Todos los Reynos de España*, Anvers, Christophoro Plantino, 1571.

<sup>43</sup> See, for example, José de Seabra da Silva, *Op. Cit.*, pt. I, vol. 2, p. 386.

<sup>44</sup> *Id., Ibid.*, pt. I, vol. 1, pp. 1-3.

<sup>45</sup> *Id., Ibid.*, pt. II, pp. 1-6.

figures are presented, such as Egas Moniz, who offered his own life to prevent Afonso Henriques, the first King of Portugal (r.1139-1185), from rendering vassalage to the King of Castile, and Martim de Freitas, the governor of Coimbra who refused to give the city's castle to other than King Sancho II (r.1223-1248)<sup>46</sup>.

But besides these general remarks, there are four aspects of medieval Portuguese history that are crucial to some of the *Dedução's* main theses: the origins of Portugal, the legendary *cortes* (that is the parliamentary assembly) of Lamego of 1143, the *cortes* of Coimbra of 1385 and the *Beneplácito régio*, that is the right for Kings to confirm and ratify rules and decisions of the Church. The origins of the Kingdom and the *cortes* of Lamego and Coimbra are treated in part 1 of the *Dedução*, whilst the *Beneplácito* is treated in part 2. These facts are used as historical arguments to contradict or to deny the legitimacy of some of the Jesuits' thoughts and actions.

One of the main accusations of the *Dedução* against the Jesuits is the role they played in the dethroning of King Afonso VI (r.1656-1683). This dethroning was decided, after a complex political process, at the *cortes* of 1668<sup>47</sup>. Many pages of part 1 of the *Dedução* are occupied with this question. The *Dedução* not only criticizes the Jesuits' action across this process, accusing them of spreading false rumors about King Afonso VI and of forging prophecies but also denying the very legitimacy of the *cortes* for dethroning Kings<sup>48</sup>. In doing so, the authors of the *Dedução* use a complex set of political, juridical, and historical arguments intended to contradict consensualist theories of royal power and the popular origins of the Portuguese monarchy, which ultimately sustained the legitimacy of the *cortes* for dethroning Kings. The *Dedução* distinguishes several types of political organizations, namely monarchies and republics. According to it, in republics, people have supreme power and authority, whereas, in monarchies like Portugal, Kings have supreme power and authority. And, as one would expect, the *Dedução* states that Kings derive their power from God alone, without the intermediation of the people. These general principles shape the *Dedução's* view of Portugal's history and sometimes provoke original readings of some of its episodes.

One such case is the story of how Portugal became a Kingdom and how its frontiers were established. Generally speaking, old Portuguese chronicles and histories present-

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<sup>46</sup> *Id., Ibid.*, pt. I, vol. 1, p. 251. Both of these narratives are legends created or transmitted by 14<sup>th</sup> and 15<sup>th</sup> centuries Portuguese chronicles, namely the so-called *Crónica Geral de Espanha de 1344* (Egas Moniz) and the so-called *Crónica de Portugal de 1419* (Martim de Freitas). Martim de Freitas's story, however, must have been known by the authors of the *Dedução*... through Rui de Pina's *Crónica de D. Sancho II* (ca. 1515).

<sup>47</sup> Ângela Barreto Xavier and Pedro Cardim, *Afonso VI*, Lisbon, Círculo de Leitores, 2006.

<sup>48</sup> For 18<sup>th</sup> century debates on the nature and functions of the Portuguese *cortes*, which had reunited for the last time in 1698, see Pedro Cardim, "O quadro constitucional. Os grandes paradigmas de organização política: A Coroa e a representação do reino. As cortes", in J. Mattoso, *História de Portugal*, vol. 4, Lisbon, Editorial Estampa, 1993, pp. 145-150.

ed two views of this question<sup>49</sup>. Medieval and early 16<sup>th</sup>-century chronicles stated that the origins of Portugal as an autonomous entity were based on the decision of King Alfonso VI of Leon and Castile (late 11<sup>th</sup> century) to create a countship which included the territory between the rivers Minho and Mondego and donate it to his illegitimate daughter, Teresa, when she married Count Henry of Burgundy (ca. 1096). Then, after the death of Count Henry (ca. 1112), their son, Afonso Henriques, would command a rebellion against his mother and eventually become the main ruler of the countship (1128). Once in command of the countship, Afonso Henriques would win many battles against the Moors. Before the first of those battles, that of Ourique in 1139 (in which, according to 15<sup>th</sup>, 16<sup>th</sup>, and 17<sup>th</sup>-century chronicles, Jesus appeared to him) his men would give him the title of King, a change that the Pope would accept a few years before Afonso Henrique's death in 1185. Some late 16<sup>th</sup>-century chronicles, however, stated that the Kingdom of Portugal had existed long before Afonso Henriques and that its right to autonomy rested on the multi-secular presence of the same people in the same territory<sup>50</sup>. This conception was influenced by some ideas of humanist historiography and intended to deny, on a historical basis, the rights of the Spanish Kings to rule in Portugal, an issue which had gained considerable importance after King Sebastião's death without heirs in 1578.

Both views could be used for proving that Portuguese Kings depended on his people's will for ascending to the throne, and that, therefore, the people could, at any time, dethrone Kings. This could not be accepted by Pombal's ideology. The *Dedução*, then, presents a different version of the origins and historical legitimacy of Portuguese monarchy and its territory. According to it, Portugal's beginnings as a Kingdom rested not on Afonso Henriques, nor on his grandfather, but on his great-grandfather, King Fernando I of Leon and Castile (r. 1037-1065)<sup>51</sup>. According to the *Dedução*, he was the first Christian King to conquer Portuguese territory from the Moors. Since this was a conquest based on the principles of a just war, he gained full rights to that territory. We can say that this is only half-true. Christian Kings prior to Fernando I of Castile and Leon had conquered what was to become the Portuguese territory located up to the river Douro. Fernando's military campaigns, though important, had been responsible only for conquering lands located roughly between the river Douro and the river Mondego, namely the cities of Coimbra, Lamego and Viseu. But the reason why Fernando I of Castile and Leon is so

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<sup>49</sup> Filipe Alves Moreira, "As cores e as origens de Portugal entre o conde de Barcelos e Fernão de Oliveira", in Isabel de Barros Dias and Carlos Carreto, *Cores. Actas do VII Colóquio da Secção Portuguesa da Associação Hispânica de Literatura Medieval*, Lisbon, Universidade Aberta, 2010, pp. 147-156.

<sup>50</sup> Such is the case of Fernão de Oliveira's *História de Portugal*. A recent edition is to be found in the second volume of *Obras Pioneiras da Cultura Portuguesa*, Lisbon, Círculo de Leitores, 2018. See also José Eduardo Franco, *O Mito de Portugal. A Primeira História de Portugal e a Sua Função Política*, Lisbon, Roma Editora, 2000.

<sup>51</sup> José de Seabra da Silva, *Op. Cit.*, pt. 1, vol. 2, p. 386.

important to the *Dedução's* line of argumentation is that he divided his Kingdom among his three sons. Following Fernando's will, after his death his eldest son, Sancho, became the King of Castile, whereas Alfonso became the King of Leon and Garcia became the King of Galicia, which included also the territory located between the rivers Minho and Mondego. For that reason, the *Dedução* argues that the Portuguese territory owned his kingship status to a King's decision alone, without any intervention of the people or other authority. Once constituted as an independent political entity, Portugal was to remain so regardless of its sovereign's title, and its sovereignty would be inherited without the need for the people's or any external authority's assent. So, the *Dedução* states, what happened at the battle of Ourique was simply the change of title of Portugal's main ruler from Count to King<sup>52</sup>. As for the rest of Portuguese territory, that is the portion held by Moors south of the Mondego river, the *Dedução* says that it was conquered by Afonso Henriques and his immediate successors, with the exception of the Algarve, which had been conquered by the Castilian Kings Fernando III (r. 1217-1248) and then Alfonso X (r. 1248-1282), who decided to donate it to his son-in-law, Afonso III of Portugal (r. 1245-1279)<sup>53</sup>. Once again, according to this version, everything was dependent upon the King's will and actions alone. There are, therefore, no historical reasons that support the people's right to dethrone Kings. The reference to the Algarve is an interesting one. The *Dedução* cites the Chronicle of Afonso III (which is, as I've said, the only ancient Portuguese chronicle cited in the text), but omits the fact that, according to this chronicle, those mainly responsible for conquering the Algarve were not the Castilian Kings (nor the Portuguese), but the military order of Santiago, whose Portuguese branch was by then not independent from the Castilian one. By doing so, the *Dedução* clearly highlights the importance of royal power for the expansion of the Portuguese territory.

Besides rejecting the legitimacy for *cortes* to dethrone Kings, the *Dedução* also denies that the *cortes* had unlimited rights to elect Kings or to limit their power. In order to prove this, its authors explain what were, in its origins, the aims of the *cortes*. In this respect, the *Dedução* argues that the *cortes* were a consultative and not a deliberative institution<sup>54</sup>. The *cortes* advised Kings but had no power to decide anything, and the only reason for their very existence was that Kings should listen to the people's opinions on matters of public interest and had no other way for doing it. Once stronger and efficient central institutions were created, the *cortes* lost power and declined. That was one extra reason for the *cortes* of 1668 to be considered illegal and illegitimate.

The *Dedução* also offers an interpretation of the two Portuguese medieval *cortes* that were used to sustain opposite views, namely the *cortes* of Lamego of 1143 and the *cortes*

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<sup>52</sup> *Id., Ibid.*, pt. I, vol. 2, p. 388.

<sup>53</sup> *Id., Ibid.*, pt. I, vol. 2, pp. 388-389.

<sup>54</sup> *Id., Ibid.*, pt I, vol. 2, p. 450.

of Coimbra of 1385. The *cortes* of Lamego of 1143 never existed. They are a forgery created by late 16<sup>th</sup>-century Portuguese historians with nationalist purposes<sup>55</sup>. According to the forged minutes of these *cortes*, they established, among other things, the rules of succession for the Portuguese monarchy, denying the rights of women. This was meant to reject the rights of Filipe II of Spain to the Portuguese throne since he was the son of a Portuguese princess. But according to some interpretations of this forged text, the *cortes* of Lamego were also a way for the Portuguese people to accept or elect Afonso Henriques as their King. The *Dedução* doesn't deny the historicity and the relevance of these *cortes* but defends that their role was to create a fundamental law for the hereditary succession to the Portuguese throne and that Afonso Henriques' legitimacy derived from inheritance and conquest rather than choice or election. And fundamental laws, the *Dedução* argues, can be revoked by no one, not even by Kings<sup>56</sup>. So, contrary to what the Jesuits said during the 1668 events, no one has the right to replace Kings whose legitimacy rests on the fundamental law.

As for the *cortes* of Coimbra of 1385<sup>57</sup>, the *Dedução* admits that they elected João I (r. 1385-1433) to succeed his half-brother Fernando I (r. 1367-1383)<sup>58</sup>. This was, however, the *Dedução* states, an exceptional case, explained only by the fact that, according to the fundamental law of succession established at the *cortes* of Lamego, no one filled the criteria for accessing the throne after Fernando's death. In 1668, when King Afonso VI was dethroned, there was no successional issue, so the historical example of the *Cortes* of 1385 did not serve as a legitimate antecedent. Medieval and Early Modern Portuguese chronicles also maintain that the throne was legally empty after the death of King Fernando, but, of course, make no reference to the *cortes* of Lamego<sup>59</sup> nor to any type of fundamental law for the hereditary succession to the Portuguese throne which had been established by Afonso Henriques.

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<sup>55</sup> See M. Gloël, "António Brandão and the invention of the 'Cortes de Lamego' in 1143", *Revista de Historiografia*, vol. 33, 2020, pp. 179-192. José Domingues ("A reforma das ordenações do reino de Portugal", *e-Legal History Review*, no. 16, 2013, pp. 45-49, 81), has called attention for a 15<sup>th</sup> century document from Tavira, Algarve, that mentions an ancient law made by an unknown Portuguese King but said to be from the time of the Battle of Ourique (1139). Domingues thinks this might be an allusion to the *cortes* of Lamego, but I see no basis for saying that. To say that something was from the time of the battle of Ourique was simply a way for saying something was quite old, just like we nowadays say that something is as old as the Cathedral of Braga.

<sup>56</sup> José de Seabra da Silva, *Op. Cit.*, pt. I, vol. 2, pp. 450-460.

<sup>57</sup> See, among many others, Armindo de Sousa, *As Cortes Medievais Portuguesas (1385-1490)*, vol. 1, Lisbon, Instituto Nacional de Investigação Científica, 1990, pp. 291-294, and Maria Helena da Cruz Coelho, *D. João I*, Lisbon, Círculo de Leitores, 2005.

<sup>58</sup> José de Seabra da Silva, *Op. Cit.*, pt. I, vol. 2, pp. 450-460.

<sup>59</sup> The oldest and most important chronicle devoted to this king is that of Fernão Lopes, the first Portuguese royal chronicler, which was written ca. 1440.

Part 2 of the *Dedução* deals, as I have already said, with the relationship of the Monarchy with the Church, with special emphasis on matters of censorship. Its main goal is to contradict the Jesuits by sustaining the superiority of royal power except for strictly religious matters and that only the State, not the Church, has the authority to censor books that deal with profane matters. The historical background of this dispute is the reform Pombal has enacted of the official institutions of censorship by creating the “Real Mesa Censória” in 1768<sup>60</sup>. Prior to the establishment of the “Real Mesa”, censorship was exercised by the State, the Inquisition and the Church, but from now on the State would be the sole responsible for it, except for purely theological works. The pages devoted by the *Dedução* to censorship are, therefore, a way of legitimizing this reform. Once again, historical arguments are invoked to defend the *Dedução*’s claims, but few of them have anything to do with the medieval history of Portugal. This is not surprising, seeing that the focus of attention was the censorship of printed books. There are, however, some references to the so-called *Beneplácito régio*, that is the right for Kings to confirm and ratify rules and decisions of the Church<sup>61</sup>. According to the *Beneplácito*, no papal bull could be applied in Portugal without the approval of the King. This was first established by King Pedro I, who ruled between 1357 and 1367, but the *Dedução* says that the *Beneplácito* existed long before that. In order to sustain the antiquity of the *Beneplácito*, the *Dedução* cites several medieval laws and documents related to medieval *cortes*. The first of these laws and documents is precisely a response by King Pedro I to a request made at the *cortes* of 1361<sup>62</sup>. Nevertheless, among the cited laws there is one by João I<sup>63</sup> that refers to the *Beneplácito* and says that the King is following the same procedure his predecessors had used. This was an intelligent way for the *Dedução* to suggest the antiquity of the *Beneplácito*. The *Dedução* refers also to the fact that King João II (r. 1481-1495) suspended the *Beneplácito* in 1487 but affirms that this was a temporary measurement due only to political reasons, namely the negotiations this King had with the Holy See in order to legitimize his illegitimate son, Dom Jorge<sup>64</sup>. The supremacy of the State over the Church was, therefore, not a novelty in Portugal’s history according to the *Dedução*, which meant that the reinforcement of the role of the State in censorship was thus legitimated not only by political principles, but also by history.

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<sup>60</sup> Rui Tavares, *O Censor Iluminado. Ensaio sobre o Pombalismo e a Revolução Cultural no Século XVIII*, Lisbon, Tinta da China, 2018.

<sup>61</sup> Margarida Garcez Ventura, “Elementos para a compreensão da vigilância do rei sobre o seu reino: O beneplácito régio”, in Maria de Fátima Reis (coord.), *Poder Espiritual/Poder Temporal. As Relações Igreja-Estado no Tempo da Monarquia (1179-1909)*. *Actas do Colóquio*, Lisbon, Academia Portuguesa da História, 2009, pp. 441-449.

<sup>62</sup> José de Seabra da Silva, *Op. Cit.*, pt. II, p. 75.

<sup>63</sup> José de Seabra da Silva, *Op. Cit.*, pt. II, p. 76.

<sup>64</sup> José de Seabra da Silva, *Op. Cit.*, pt. II, pp. 83-85.



All the passages of the *Dedução* I have been analyzing show how, contrary to what one might expect, medieval history played an important role in some of the Marquis of Pombal's ideas. The history of medieval Portugal was, therefore, being written and rewritten also in the pages of the *Dedução*...

# THE RECEPTION OF THE LAW OF THE DIRECTORY IN THE 18<sup>TH</sup> CENTURY: POMBALINE POLITICAL IMPACTS IN THE PORTUGUESE AMAZON

FERNANDA SANTOS<sup>65</sup>

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## INTRODUCTION

The period known as Enlightenment instigates a revolution in the philosophical thinking of men in the world and in men in society. The second half of the 18<sup>th</sup> century sheds light on major shifts in the history of ideas. The “Age of Enlightenment”, as it became known, advocates the critical role of Reason, as well as scientific revolution and criticism on religious authority. A group of philosophers, like Diderot, Montesquieu, Voltaire or Descartes<sup>67</sup>, defend the idea that reason and progress are key factors for a “enlightened” society<sup>68</sup>. These principles orientate the legislation produced to the Portuguese America, highlighting values such as education and work – both of which could only be accomplished through Western “civilization” mechanisms, according to enlightenment ideologists. Therefore, “man’s refinement” is grounded on the possibility of civilizing the Other through education and European culture.

Conflicts of religious orders with settlers, on the one hand, and, with the Portuguese crown on the other, mark the 17<sup>th</sup> century-onwards historical context of the Portuguese America. The Regiment of the Missions of the Maranhão and Grão-Pará state<sup>69</sup> from

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<sup>66</sup> Federal University of São Paulo (UNIFESP), Brazil.

<sup>67</sup> The publication of *Persian Letters* (1734) and *The Spirit of Law* (1748), by Montesquieu, along with *Letters on the English* (1734), by Voltaire, and later the work *The Wealth of Nations* (1776), by Adam Smith, spread ideas of the European Enlightenment and of the classical school in economy (Alberto Damasceno, “Pombal, a Modernidade e as origens da reforma de ensino na América portuguesa e Portugal”, *Revista HISTEDBR On-line*, no. 69, 2016, p. 17: <https://periodicos.sbu.unicamp.br/ojs/index.php/histedbr/article/view/8648240/15125> (consulted online on November 9, 2022).

<sup>68</sup> Kalina Vanderlei Silva and Maciel Henrique Silva, “Iluminismo”, in Kalina Vanderlei Silva and Maciel Henrique Silva, *Dicionário de Conceitos Históricos*, São Paulo, Contexto, 2018, pp. 210-211.

<sup>69</sup> The administrative unity of the Maranhão state was instituted in 1626, directly linked to Lisbon. In 1654, it was temporarily extinct and renamed to Maranhão and Grão-Pará state, with its capital placed in São Luís. Only in 1751, under the reign of D. José I, it was named Grão-Pará and Maranhão state.

1686 delegates to the Society of Jesus the spiritual, political, and administrative power over indigenous villages. As a response, Francisco Xavier de Mendonça Furtado, governor of the Maranhão and Grão-Pará state, creates the Maranhão and Grão-Pará Commerce Company in 1755<sup>70</sup>. The administration of a vast territory along with the attempts to turn indigenous peoples into vassals provokes several disputes with the crown. Affirming the royal authority over the extensive Amazon area means, above all else, standing out against the religious orders and legal apparatus that support their actions in relation to the natives<sup>71</sup>. The Pombaline legislation reinforces the reformist aims of the Portuguese crown, with the project of “restoring the past greatness of the Portuguese Empire”, according to José Eduardo Franco<sup>72</sup>.

Sebastião José de Carvalho e Melo, D. José I’s Kingdom Affairs Secretary, better known as Marquis of Pombal, title to which he ascends in 1769, exerts control over nearly the entire royal administration<sup>73</sup>. The program he establishes to the Portuguese America comprehends institutional reforms. Moreover, he seeks to combat the consequences of the Tridentine counter-reformation, due to which the Catholic pontiff had concentrated power<sup>74</sup>.

While Brazil was the “cornerstone” of Portuguese imperial activity in the 1600s, the Atlantic markets go through modifications and become more complex. Stuart Schwartz<sup>75</sup>

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Its headquarters was moved to Belém, encompassing the capitals of Grão-Pará, Maranhão, Piauí and, later in 1755, São José do Rio Negro. In 1772, however, two new units were built: the Maranhão and Piauí state and the Grão-Pará and Rio Negro state, based in and directly subordinated to Lisbon. This configuration remained until mid-19<sup>th</sup> century (Patrícia Melo Sampaio, “Administração colonial e legislação indigenista na Amazônia portuguesa”, in Mary del Priore and Flávio Gomes (org.), *Os Senhores dos Rios: Amazônia, Margens e História*, Rio de Janeiro, Editora Campus, 2003, pp. 123-124). The notion of “Amazon” as a region was established only in the 19<sup>th</sup> century (see Mauro Cezar Coelho, *Do Sertão para o Mar. Um Estudo sobre a Experiência Portuguesa na América, a partir da Colônia: O Caso do Diretório dos Índios (1751-1798)*. Phd Thesis presented to the University of São Paulo, São Paulo, policopied text, 2005). We often use the expression “Amazon Valley” or “Portuguese Amazon” (see Patrícia Melo Sampaio, *Op. Cit.*) when we refer to the second half of the 18<sup>th</sup> century.

<sup>70</sup> Elaine Maria Santos, “Da Lei do Diretório ao Alvará de 1770: Civilizar para o bem do Estado”, in Luiz Eduardo Oliveira (org.), *A Legislação Pombalina sobre o Ensino de Línguas: Suas Implicações na Educação Brasileira (1757-1827)*, Maceió, UFAL, 2010, p. 251.

<sup>71</sup> Yllan Mattos, *A Última Inquisição: Os Meios de Ação e Funcionamento do Santo Ofício no Grão-Pará Pombalino: 1750-1774*, São Paulo, Paco Editorial, 2012, p. 51.

<sup>72</sup> José Eduardo Franco, *O Mito dos Jesuítas: Em Portugal, no Brasil e no Oriente (Séculos XVI a XX)*, vol. I, Lisbon, Gradiva, 2006, p. 335.

<sup>73</sup> Luiz Eduardo Oliveira and José Eduardo Franco, “O Marquês de Pombal e a invenção do Brasil: Coordenadas históricas”, *Revista de Estudos de Cultura – REVEC*, no. 4, January/April 2016, p. 27.

<sup>74</sup> José Eduardo Franco, *Op. Cit.*, pp. 335, 337.

<sup>75</sup> Stuart B. Schwartz, “A economia do império português”, in Francisco Bethencourt and Diogo Ramada Curto (eds.), *A Expansão Marítima Portuguesa: 1400-1800*, Lisbon, Edições 70, 2010, p. 37.

points the period from 1680 to 1760 as marked by gold and diamonds discovery, causing the displacement of free populations and slaves to the South of Brazilian regions, to mining areas and away from coastal agriculture areas<sup>76</sup>. Between 1760 and 1780, the gold production declines, the export agriculture breaks, and foreign competition increases. This moment coincides with Pombal's government and leads the Brazilian economy to a transition. Additionally, some actions favor several sectors of both the colony and metropolis<sup>77</sup>, such as the application of mercantilist measures to diminish Portuguese reliance on Great Britain, along with a series of political, administrative, and military reforms.

The social reform and Pombal's economic strategies become more evident to the north of Brazil<sup>78</sup>. Historical approaches to the functioning of Pombal's reforms rarely focus on "discrepancies between intentions and results" or between the proposed legislation and its limits<sup>79</sup>. Although enlightened premises advocate the subject's autonomy<sup>80</sup>, the reception of Pombaline laws in the great area of the Grão-Pará and Maranhão state demands extra attention to the several agents who compose the power struggle among the Portuguese crown, local authorities, and indigenous peoples in the second half of the 18<sup>th</sup> century. In 1757, the intitled *Directório Que Se Deve Observar nas Povoações dos Índios do Pará e Maranhão, enquanto Sua Majestade não Mandar o Contrário*, generally known as *The Law of the Directory* (in Portuguese, *Directório dos Índios*), replaces the Regiment of the Missions. Until 1757, the Directory had jurisdiction over the indigenous peoples of the Amazon and in

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<sup>76</sup> Gold deposits in Minas Gerais and, in 1730, in Mato Grosso and Goiás reached numbers that, in a decade, exceeded the gold production of the entire Spanish America until then. At its peak, Brazilian gold production achieved an annual average of over 3 metric tons. The consequences were populational displacement to the countryside, abandonment of coastal agriculture, and a migratory flow from Portugal. With the opening of the mines, the price of slave labor also increased (Stuart B. Schwartz, *Op. Cit.*, pp. 38-39).

<sup>77</sup> According to Luiz Felipe de Alencastro, "A rede económica do mundo atlântico português", in Francisco Bethencourt and Diogo Ramada Curto (eds.), *A Expansão Marítima Portuguesa: 1400-1800*, Lisbon, Edições 70, 2010, pp. 137-138), English exports to Portugal accompany the increase in shipments of Brazilian gold to Lisbon until the 1750s-1760s. From 1761 to 1770, gold shipments decline, and Portugal expands its agricultural exports from the colonies. Meanwhile, Brazilian exports of sugar, tobacco, rice, cotton, cocoa, and leather grew.

<sup>78</sup> Stuart B. Schwartz, *Op. Cit.*, pp. 42-43.

<sup>79</sup> José Damião Rodrigues, "Para o socego e tranquilidade publica das Ilhas: Fundamentos, ambição e limites das reformas pombalinas nos Açores", *Tempo*, vol. 11, no. 21, 2006, p. 152.

<sup>80</sup> The author José Ricardo Carvalheiro applies the idea of reception to media studies but argues about the relevance of historical enquiry on the concept and its "potentials and limitations" to research. Even though it works with oral sources from the 1940s and 1950s, historical review on the concept allows one to observe its enlightened principals, based on the dynamics of subject autonomy and social regulation (José Ricardo Carvalheiro, "Sobre recepção, história e memória: Notas epistemológicas e metodológicas", *Média & Jornalismo*, no. 22, 2013, p. 71).

1758 it began to cover all the native peoples of Brazil<sup>81</sup>. The legislative piece also works as a response from Pombal's ministry, which seeks to incorporate colonial and metropolitan demands. The application of the Directory, however, causes some problems in the practice of each regional context, and it entails a set of transformations in daily lives. A text's history of reception allows, according to José Ricardo Carvalheiro, "access to new symbolic universes, unprecedented communicative connections, and options for collective affiliation; as well as to reconfigurations of social regulation, hierarchical relationships, and mechanisms of ideological domination"<sup>82</sup>.

The European Enlightenment influence is, on the one hand, in line with the perspective that a "polished and civilized" Europe is opposed to the Jesuit-caused delays and, on the other, with a "historical self-awareness, based on the invention of a tradition of Lusitanian people, thus going back to the times of the great navigations of the 16<sup>th</sup> century"<sup>83</sup>. The civilizing rhetoric of the legislation centralizes normative codes and a political platform that encourages the colonization of the Amazon region.

The reception of the Directory is remarkably complex in our analysis, directly impacting the following century. As per Francisco Cancela, regional adaptation is nothing more than a "translation" of legislation to a specific reality, with "readings and appropriations of legal codes emanating from the central power"<sup>84</sup>. This article observes some aspects of the reception of the Directory in the vast area then designated Grão-Pará and Maranhão, specifically in the Amazonian Valley, where it had greater impact. The 18<sup>th</sup>-century Amazon is inhabited by indigenous people, whom Pombaline proposals affect directly.

## PROPOSITIONS OF THE LAW OF THE DIRECTORY AND INDIGENIST POLICIES

The development of a set of laws in the 18<sup>th</sup> century stems from a broad vision, a new colonization project to be applied. To make it possible, it becomes necessary to redefine the political-administrative structure and demarcate the limits of northern Brazil. At the regional level, the enterprise requires an acceleration in the municipalization process<sup>85</sup>.

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<sup>81</sup> Luiz Felipe de Alencastro, *Op. Cit.*, p. 136.

<sup>82</sup> José Ricardo Carvalheiro, *Op. Cit.*, p. 73.

<sup>83</sup> Luiz Eduardo Oliveira and José Eduardo Franco, *Op. Cit.*, pp. 27-28.

<sup>84</sup> Francisco Cancela, "Recepção e tradução do *Directório dos Índios* na Capitania da Bahia: Uma análise do *Parecer* do Conselho Ultramarino da Bahia (1759)", in *Caderno de Resumos. XXVII Simpósio Nacional de História*, Natal, ANPUH, 2013, pp. 1-2.

<sup>85</sup> José Manuel Azevedo e Silva, *O Modelo Pombalino de Colonização da Amazônia*, Lecture given on May 9, 2002, in the Sala dos Capelos of the University of Coimbra, within the scope of the Aggregation Tests, 2002, p. 1.

The Law of the Directory (1757-1798) regulates the freedom of indigenous populations, establishing a “plan of civilization” with the following objectives: “the expansion of the Faith; the extinction of Gentilism; the propagation of the Gospel; the civility of the Indians; the common good of Vassals; the rise of Agriculture; the introduction of Commerce; and, finally, the establishment, opulence, and total happiness of the State”<sup>86</sup> (translated). The legislative piece encompasses the Law of Liberties (June 6, 1755), the June 7 Law, from the same year, and the Law of the Directory, from 1757. The first one is responsible for making indigenous enslavement illegal. The second ends the temporal authority missionaries held towards indigenous peoples, especially in the administration of the villages. The law establishes that chiefs themselves (the principals) must manage populations. The third law, in turn, regulates freedom and approaches the temporal and religious administration of indigenous populations<sup>87</sup>.

The Law of the Directory is a very important strategy to D. José I's reign, in addition to being one of the direct consequences of territorial conflicts between Portugal and Spain. The Directory guarantees the possession and usufruct of the vast Amazonian territory. In the 18<sup>th</sup>-century historical context, the loss of the Portuguese colonies to the East and the disputes with the Spanish crown influence this decision-making. The Treaty of Madrid (1750) represents the attempts to define the limits of the territories covered by the Iberian crown<sup>88</sup>. Due to the Treaty, Portugal secures territories that are geographically more extensive in the North than in the South; therefore, the Pombaline government focuses its attention on the Amazon<sup>89</sup>. The Pombaline perspective holds that consolidating Portuguese power is necessary, above all in border regions, where the territorial dispute with foreign powers is more intense<sup>90</sup>.

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<sup>86</sup> *Directorio Que se Deve Observar nas Povoações dos Índios do Pará, e Maranhão emquanto Sua Magestade nao Mandar o Contrario*. Lisbon: Officina de Miguel Rodrigues, 1758.

<sup>87</sup> Mauro Cezar Coelho, “A construção de uma lei: O Diretório dos Índios”, *Revista Instituto Histórico e Geográfico Brasileiro*, year 168, vol. 437, 2007, pp. 29-30.

<sup>88</sup> The Treaty of Madrid was signed in January 1750 between Portugal and Spain (respectively during the reigns of D. João V and Fernando IV), with the objective of defining the limits between the South American colonies, overriding the limits established by the Treaty of Tordesillas. Another agreement, signed in 1777, that of Santo Ildefonso, establishes the possession of the colony of Sacramento, the subject of disputes between Portugal and Spain.

<sup>89</sup> Nádia Farage, *As Muralhas dos Sertões: Os Povos Indígenas no Rio Branco e a Colonização*, Rio de Janeiro, Paz e Terra/Anpocs, 1991, p. 34.

<sup>90</sup> Mauro Cezar Coelho and Rafael Rogério Nascimento dos Santos, “‘Monstruoso systema [...] intrusa e abusiva jurisdição’: O Diretório dos Índios no discurso dos agentes administrativos coloniais (1777-1798)”, *Revista de História de São Paulo*, no. 168, 2013, p. 105.

## RECEPTION AND IMPACT OF POMBALINE LAWS

The Pombaline indigenist policy invests in the effective colonization of the Amazon valley, seeking to reproduce the same experience of the Pará and Maranhão state in the State of Brazil<sup>91</sup>. The Directory changes the official policy on the presence of whites in indigenous villages, as their presence in such places is encouraged<sup>92</sup>. One of the biggest impacts of the Directory concerns the imposed Pombaline reconfiguration on native populations. Interracial marriages, for instance, directly influence indigenous peoples and their identities. A new policy of territorial control begins to be implemented in the Captaincy of Pará, as well as in the State of Brazil<sup>93</sup>. Indigenous peoples are the first ones to suffer the impacts of legislation that, on the one hand, place them “citizens”, but, on the other, does not provide them with full capacity to choose within the complex net of relations between the Portuguese crown and local powers.

The Directory proposes the formation of “villages” as determined by the crown rather than the living practices taking place before (in Portuguese, the *aldeamentos*). It also tries to incorporate different ethnic groups in the same place. The occurrence of *descimentos* (capture of indigenous people to be Christened and prepared to work in settlements) leads to the replacement of some indigenous leaders by the colonial society, but without losing their link to their groups. According to Mauro Cezar Coelho and Rafael dos Santos<sup>94</sup>, this is a complex process, given that new social relations are engendered far from legal determinations. The new administrative structure is composed of “directors, principals, members of the boards, sergeants-majors, canoe cables, vicars, and parish priests [...]”.

The documents Mauro Cezar Coelho<sup>95</sup> mentions allow one to observe the census of the inhabitants based on the links established with the main figures of the villages, highlighting, as per the author, “the importance of indigenous leaders to the achievement of the project to consolidate the Portuguese presence in the Amazon Valley”<sup>96</sup>. Indigenous leaders represent the guarantee of intermediation in *descimentos* and in the regional gov-

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<sup>91</sup> Francisco Cancela, *Op. Cit.*, pp. 2-3.

<sup>92</sup> André Augusto Fonseca, “Os mapas da população no Estado do Grão-Pará: Consolidação de uma população colonial na segunda metade do século XVIII”, *Revista Brasileira de Estudos de População*, vol. 34, no. 3, 2017, p. 450.

<sup>93</sup> Alanna Souto Cardoso, “Por uma cartografia etno-histórica da Amazônia colonial (séculos XVIII e XIX)”, in *3.º Simpósio Brasileiro de Cartografia Histórica*, Belo Horizonte, Federal University of Minas Gerais, 2016, pp. 299, 301.

<sup>94</sup> Mauro Cezar Coelho and Rafael Rogério Nascimento dos Santos, *Op. Cit.*, p. 106.

<sup>95</sup> Letters Mauro Cezar Coelho (*Do Sertão para o Mar [...]*, *Op. Cit.*, p. 218) mentioned about censuses on the villages of Lamalonga and Barcelos (Pará state): Philippe Serrão de Castro, Letter to the governor of the Captaincy in July 1, 1770 – Public File of Pará, 217, 17; Bernardo Toscano de Vasconcelos, Letter to Fernando da Costa de Ataíde Teive in July 20, 1770 – Public File of Pará, 217, 43.

<sup>96</sup> Mauro Cezar Coelho, *Do Sertão para o Mar [...]*, *Op. Cit.*, p. 218.

ernment. The indigenous military officers and the principals acquire their legitimized authority through the state governors and the king himself, which means that the bureaucracy recognizes the connection between indigenous officers and their respective ethnicities. This implies that the native chiefs should fit into a model of nobility in the Portuguese society<sup>97</sup>.

One consequence of this repopulation and repositioning process concerns the escape of the natives, which had been happening for a long time, as Flávio Gomes (translated) observes:

It is essential to analyze how many meanings were attributed to cultural reinventions and socio-ecological readaptations, in which villages and the non-permanence (escapes) could represent, among other things, resistance to the implemented economic practices. Therefore, indigenous micro-societies – many of which emerged from fugitive communities – could be readapting material culture and socio-economic practices. Given that, the possibility of political meanings in the formation of indigenous *mocambos* and the collective escapes from 1755 to 1780 are to be highlighted<sup>98</sup>.

The inspection of native vassalage continues after its beginning in 1755, mainly due to the lack of labor in the fields. Desertions and epidemics<sup>99</sup> are part of this context. The process of missions secularization, which were entrusted to the Society of Jesus until then, advances, transforming indigenous peoples into royal subjects.

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<sup>97</sup> Rafael Ale Rocha, *Os Oficiais Índios na Amazônia Pombalina: Sociedade, Hierarquia e Resistência (1751-1798)*, Master's dissertation presented to the Universidade Federal Fluminense, Niterói, policopied texto, 2009, pp. 16-17.

<sup>98</sup> “É fundamental analisar o quanto podia haver de significados de reinvenções culturais e readaptações sócio-ecológicas, onde aldeamentos, a não-permanência (fugas), podia representar, entre outras coisas, resistência às práticas econômicas implementadas. Assim micro-sociedades indígenas – muitas das quais surgidas de comunidades de fugitivos – podiam estar readaptando cultura material e práticas sócio-econômicas. Destacando a possibilidade dos significados políticos na formação dos mocambos de índios e fugas coletivas no contexto de 1755 a 1780” (Flávio Gomes, “Migrações, populações indígenas e etno-gênese na América portuguesa (Amazônia colonial, s. XVIII)”, *Nuevo Mundo Mundos Nuevos* [En-ligne], Débats, 2011: <http://journals.openedition.org/nuevomundo/60721> (consulted online on January 17, 2021).

<sup>99</sup> From the 16<sup>th</sup> century onwards, epidemics of smallpox, measles, diphtheria, scarlet fever, mumps, whooping cough, tetanus, and tuberculosis were frequent (Cristina Brandt Friedrich Martin Gurguel, *Índios, Jesuítas e Bandeirantes. Medicinas e Doenças no Brasil dos Séculos XVI e XVII*, Phd Thesis presented to the Universidade Estadual de Campinas, Campinas, policopied texto, 2009, p. 72). Along with several types of influenza, these diseases decimated indigenous villages. There are no concrete numbers of victims of these devastating ailments, given the difficulty to compute them (Flávio Gomes, *Op. Cit.*).



Another important impact of the Directory regards the new formations of indigenous fugitive groups, the so-called “indigenous mocambos”<sup>100</sup>. “Resistance Cartography”, as per Alanna Cardoso<sup>101</sup>, seems to constitute a fundamental aspect to read the 18<sup>th</sup>-century Amazon. The “amocambado space” includes indigenous and African fugitives<sup>102</sup>, some of which comprehend only five or ten people while others count with hundreds of inhabitants. Some of these settlements are transitory; others, in turn, become permanent<sup>103</sup>. The mocambos were located in strategic spots among villages, so as to allow the scape to scattered places as a means to hinder the (re)capture<sup>104</sup>. Resistance strategies were not limited to the formation of mocambos, other acts of rebellion, individual or collective, took place in several Brazilian regions<sup>105</sup>. Even though escapes did not always occur, the greatest concerns were the lack of available labor and the dispersion towards the proposed plan. The letter Mendonça Furtado wrote to Diogo de Mendonça Corte-Real<sup>106</sup> in Pará on November 30, 1751 highlights the following points:

If all these men suddenly lost what they call slaves, the results would be: the few crops not functioning; those who do not know how to fish or hunt starving, without human remedy; the indigenous, because of their freedom, scattered throughout these regions or perhaps in *mocambos*, to which everyone is inclined, and all of this suddenly. I would be unable to gather these indigenous people to give them as servants to those of whom they had been slaves. It is certain that those laborious effects could progress in which despair often breaks out. And the Square would lack in strength to be able to contain the residents from getting into some disorder<sup>107</sup>.

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<sup>100</sup> The terms *quilombo* and *mocambo* share the same meaning, although the second term is more commonly used in the Amazon region.

<sup>101</sup> Alanna Souto Cardoso, *Op. Cit.*

<sup>102</sup> *Id.*, *Ibid.*, p. 306.

<sup>103</sup> A. J. R. Russell-Wood, “Padrões de colonização no império português, 1400-1800”, in Francisco Bethencourt and Diogo Ramada Curto (eds.), *A Expansão Marítima Portuguesa: 1400-1800*, Lisbon, Edições 70, 2010, p. 197.

<sup>104</sup> Rozemberg Ribeiro de Almeida and Francivaldo Alves Nunes, “Escravidão, resistência, fugas e a formação de quilombos/mocambos em Ourém do Grão-Pará (finais do século XVIII a 1830)”, *Revista Nova Amazônica*, year VII, vol. 1, 2018, pp. 183-184.

<sup>105</sup> *Id.*, *Ibid.*, p. 184.

<sup>106</sup> Letter to Diogo de Mendonça on the execution of the provision § 6 of the Instructions from May 31, 1751 and on the reasons for its postponement. Pará, November 30, 1751 (Marcos Carneiro de Mendonça, *A Amazônia na Era Pombalina*, 2<sup>nd</sup> ed., vol. 1, Brasília, Edições Senado Federal, 2005, pp. 132-136). Diogo de Mendonça Corte Real was Secretary of the Navy and Overseas Domains between 1750 and 1756. About his ministry, see Mario Francisco Simões Junior’s work: *A Secretaria de Estado do Ultramar e Diogo de Mendonça Corte Real. Inflexões na administração central do Império Português (1750-1756)*, 2017.

<sup>107</sup> “Todos esses homens, se de repente se vissem sem os que eles chamam escravos; as poucas lavouras que há paradas; os outros que não sabem pescar, nem caçar, mortos de fome, sem remédio humano; os

The mocambos forced the enactment of new resolutions, such as the one of May 30, 1750, which establishes the practice of “marking the slaves found in mocambos; however, it entirely prohibits and opposes that the indigenous caught in those mocambos could be possibly marked as black people were [...]”<sup>108</sup>. In a note from the author of the compilation of Mendonça Furtado’s letters, Carneiro Mendonça observes that, in the Provision of the Overseas Council from May 12, 1751, Furtado treats indigenous “as people, and not as despicable animals”<sup>109</sup>. Mistreatment towards indigenous peoples is a prerogative of the Portuguese settlers, according to Mendonça Furtado, and this is a problem that must be solved:

Upon attempts to escape or any other act considered impertinent, it is common for most of these residents to have Indians, whom they call slaves, tied up and, with a red-hot iron or with a lancet, tyrannically open the name of their supposed lord on their chests. Given that the letters are often large, it is necessary to write two rules, whose torment the miserable Indians suffer without human remedy<sup>110</sup>.

The economic situation in the Grão-Pará and Maranhão state begins to decline due to lack of manpower, caused by indigenous people’s escapes and epidemics. For the Pom-baline government, it is urgent to take measures to offset the loss of capital and boost the colonization efforts. The recruitment of settlers from the islands of Azores and Madeira to Pará and Maranhão contributes to this process, which seeks to reinforce the presence of Portugal<sup>111</sup> in a territory constantly threatened by the French. In this context, the Portuguese from Mazagão (Moroccan square) are taken to the current state of Amapá (at the time region of Cabo do Norte), where they found the region of Vila Nova de Mazagão<sup>112</sup>.

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índios, em virtude da sua liberdade, espalhados por estes sertões, ou talvez em mocambos para o que todos têm propensão, e tudo isto de repente; eu, sem meios de poder juntar os tais índios para os dar por criados àqueles de quem tinham sido escravos, é certo que poderiam progredir aqueles trabalhosos efeitos em que costumam romper muitas vezes as desesperações, e a Praça totalmente sem forças para poder conter aos moradores de passarem a alguma desordem”.

<sup>108</sup> Proceedings of the Public Library and Archive of Pará, t. II, p. 7, doc. 6 (*apud* Marcos Carneiro de Mendonça, *Op. Cit.*, p. 387).

<sup>109</sup> *Id.*, *Ibid.*, p. 387.

<sup>110</sup> Proceedings of the Public Library and Archive of Pará, t. II, p. 7, doc. 6 (*apud* Marcos Carneiro de Mendonça, *Op. Cit.*, p. 388): “É costume, na maior parte desses moradores, que fugindo alguns destes índios, a quem eles chamam escravos, ou fazerem-lhes outro qualquer delito que a eles lhes pareça, mandarem-nos amarrar e com um ferro em brasa, ou com uma lanceta, abrirem-lhes com tirania o nome do suposto senhor no peito, e como muitas vezes as letras são grandes, é preciso escreverem-se duas regras, cujo tormento sofrem os miseráveis índios sem remédio humano”.

<sup>111</sup> José Manuel Azevedo e Silva, *Op. Cit.*, p. 14.

<sup>112</sup> Vila Nova de Mazagão is currently part of the metropolitan region of Macapá. The municipality was created on November 28, 1890, with three districts: Mazagão, Carvão, and Magazão Velho. It borders

Young soldiers are recruited all over the kingdom to replace the three regiments created in 1753 in Maranhão and Pará. They are granted privileges, such as land, if they marry indigenous people<sup>113</sup>.

## **CRITICISMS TO THE DIRECTORY: THE ROYAL CHARTER OF 1798**

The *Law of the Directory* prevailed for over 40 years and was the target of numerous criticisms. Francisco de Souza Coutinho, governor of Pará, presents the results of its application in Grão-Pará and Maranhão state. In the Plan for the Civilization of Indians from 1797, the governor saves 20 out of 55 paragraphs to elaborate harsh criticisms of Pombaline undertakings. Coutinho highlights the low agricultural production and the deficit of *Fazenda Real* as the main results of such policies, along with the demographic instability of villages and the constant lack of manpower. Indigenous people's drunkenness and idleness are also mentioned as problems in addition to embezzlement of money by local officials. However, the governor more frequently points out the guardianship regime for indigenous people, with no limits pre-determined in the Directory, and the constant coercion made to villagers. Substitute laws, in this sense, would need to reorient the Directory's regulations. The Plan considers indigenous people as a fundamental resource, especially in the production of "drugs from the region"<sup>114</sup>. The governor also proposes the formation of militias with the distribution of command posts among indigenous leaders. Rebellions and actions to pacify the natives are mentioned in the Plan, which consolidates the process of strengthening intermediation within the villages of Grão-Pará in many areas. The logic of European work translates into keeping the population active, including indigenous groups, and forming an Effective Corps of Indigenous Peoples.

Based on the Coutinho Plan, the Royal Charter of May 12, 1798 is issued to revoke the Directory and transfer the control of indigenous people to the Boards<sup>115</sup>. In general, the proposal seeks to delimit the districts and jurisdictional zones, in order to achieve greater control over local populations. Moreover, interethnic marriages are upheld, encouraged

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Pedra Branca do Amapari and Porto Grande to the north, Santana to the northeast, the mouth of the Amazon River to the southeast, Vitória do Jari to the south and Laranjal do Jari to the west.

<sup>113</sup> José Manuel Azevedo e Silva, *Op. Cit.*, p. 14.

<sup>114</sup> The drugs include the production of cocoa, cloves, vanilla, cassia, sarsaparilla, annatto, Brazil nuts, perfume essences, among others.

<sup>115</sup> The Boards are part of the Portuguese colonial society and remain as places where legislative and deliberative bodies of the administration of a city are established.

with concessions and privileges<sup>116</sup>. As per Patrícia Sampaio<sup>117</sup>, historiography diminishes the importance of the Charter. Therefore, studies often restrict the role of the legislative piece to a replacement of the Pombaline Directory. Despite reiterating, in many aspects, the colonial legislation, the Charter authorizes the access of residents to indigenous lands and proclaims the end of the royal approval to the indigenous *descimentos*.

The last decades of the 18<sup>th</sup> century are characterized by new formal spaces of power occupied by the leaders, such as the body of militias the Charter created, in addition to the local boards. These power concessions are symbolic honors that represent, for indigenous peoples, “the prestige of the new world in which they lived” (Almeida, 2003: 161, translated). Although some opposed this royal policy, they did not always count on the support of their leaders nor on the political strategies from the Pombaline Directory<sup>118</sup>.

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<sup>116</sup> Patrícia Melo Sampaio, *Op. Cit.*, pp. 126-130.

<sup>117</sup> *Id.*, “Vossa Excelência mandará o que for servido...’: Políticas indígenas e indigenistas na Amazônia portuguesa do final do século XVIII”, *Tempo*, vol. 12, no. 23, 2007, p. 42.

<sup>118</sup> *Id.*, *Ibid.*, pp. 45, 52.

# FROM DESPOT TO FREEDOM ADVOCATE: PHILOPOMBALISM IN BRAZIL (1881-1885)

LUIZ EDUARDO OLIVEIRA<sup>119</sup>

## INTRODUCTION

The first anti-Pombaline demonstrations in Portugal took place during his government through protests and popular uprisings or through critical and satirical manuscripts and publications against the feared and all-powerful minister of D. José I. However, the anti-Pombaline discourse became stronger with the support of the State during the reign of D. Maria I (1734-1816). Consequently, antipombalists produced a large number of verses, plays, and epic poems against the deposed Marquis, who, bedridden and weakened by illness in his old age, insisted on eloquently defending his administrative acts in long writings later considered highlights of his memoirist production. After his death caused both by sickness and by the psychological torture to which he was subjected, responding to a process as a dying man, the queen did not authorize the transfer of his body to the tomb he had prepared in Lisbon, in the church where he was baptized, that of Mercês. Therefore, his remains were kept in the Church of Cardal, in Pombal, having been brutally violated by French people and soldiers during the Napoleonic invasions of 1811. Only in 1856, the Lisbon Board authorized the transfer of his remainder bones to his hometown<sup>120</sup>.

However, the publication of *Perfil do Marquês de Pombal* [*Profile of the Marquis of Pombal*] in the year of Pombal's death centenary, 1882, by Camilo Castelo Branco (1825-1890) led the mythification process of Sebastião José de Carvalho e Melo (1699-1782) to its peak. By counterpointing the Pombaline glorification the Portuguese masonry promoted, which also demonized the Jesuits, the 19<sup>th</sup>-century novelist and historian established Carvalho e Melo's image as a bloodthirsty, tyrant, and oppressor despot.

Therefore, masonic stores intensely advertised Pombal as an anachronistic defender of liberalism in the celebration of the centenary, provoking a veritable avalanche of commemorative texts, paintings, events, and lectures. Meanwhile, Camilo traced and painted in strong colors the dark profile of a cruel minister, despite his attempts to hide his libel

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<sup>119</sup> Foreign Languages Department and Graduate Program in Education, Federal University of Sergipe, Brazil; chief editor of *Revista de Estudos de Cultura*.

<sup>120</sup> José Eduardo Franco and Vanda Figueiredo, "Antipombalismo", in José Eduardo Franco (ed.), *Dicionário dos Antis: A Cultura Portuguesa em Negativo*, vol. 2, Lisbon, Imprensa Nacional-Casa da Moeda, 2018.

with information, details, and historical erudition. His work has influenced many others, including biographies, novels, theater and iconographic plays, turning Pombal into a bipolar myth, that is, the object of ideologically opposite discourses equally compromised by anachronisms and value judgments<sup>121</sup>.

The first attempts to rehabilitate Pombal's image trace back to literary history field, specifically in 1826, when two important works were published: *Résumé de l'Histoire Littéraire du Portugal, Suivi du Résumé de l'Histoire Littéraire du Brésil* [Summary of the Literary History of Portugal, Followed by the Summary of the Literary History of Brazil], by the French author Ferdinand Denis (1798-1890); and *Parnaso Lusitano* [Portuguese Parnassus], by Almeida Garret (1799-1854). Both depict the Pombaline period as moment of restoration or regeneration of the Portuguese language and literature. Denis<sup>122</sup>, for instance, praises Pombal for his anti-Jesuitism when discussing what he calls "Improvement of the State of Languages and Literature". He states that the works of the academies D. João V (1706-1750) founded "fatigued more than they instructed", until "a minister, whose genius knew how to submit and build everything", "provided two great services to Portugal: he expelled the Jesuits and tried to reconstruct literature" (translated).

However, even though he created useful institutions, overthrew the clerical power, and revived the taste for language and literature, the "genius despot" did not give rise to a poet. "And when nature produced such a regenerating talent who depended on no power, Pombal pursued him" (translated), Denis warns, mentioning the case of the poet Pedro António Correia Garção (1724-1772), whose arrest the Marquis ordered in 1771.

Garrett<sup>123</sup>, in turn, wrote *Bosquejo da História da Poesia e Língua Portuguesa* [Sketch of the History of Portuguese Poetry and Language] as an introduction to *Parnaso Lusitano*, published for the first time in 1826. On the occasion, he incorporated Madame de Stael's (1766-1817) assumptions to affirm that the civilization and the lights, after migrating from the South to the North, returned as a reaction to the corruption that made Europe dark at noon. Therefore, he believed that the "meridians" were stuck in the Jesuit clerical rhetoric, who dominated universities and lived "in the darkness of ignorance" (translated).

Like Denis, he disqualified the Johannine period: "The academies of history, of literature at the time of D. João V, along with the ridiculous associations of all the names and descriptions that were formed then, increasingly worsened the evil, which progressively

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<sup>121</sup> José Eduardo Franco and Annabela Rita, *O Mito do Marquês de Pombal: A Mitificação do Primeiro-Ministro de D. José pela Maçonaria*, Lisbon, Prefácio Editora, 2004.

<sup>122</sup> Ferdinand Denis, *Resumo da História Literária de Portugal Seguido do Resumo da História Literária do Brasil*, translation, presentation and notes by Regina Zilberman, Rio de Janeiro, Edições Makunaima, 2018, pp. 289, 292.

<sup>123</sup> Almeida Garrett, *Parnaso Lusitano ou Poesias Selectas dos Auctores Portuguezes Antigos e Modernos, Illustradas com Notas. Precedido de Uma Historia Abreviada da Lingua e Poesia Portugueza*, t. I, Paris, J. P. Aillaud, 1826, pp. 38-39.

grew until the ministry of the Marquis of Pombal”. Only then, according to the author, “the reign of King D. José rose to the heights of other peoples, if not in many things above”<sup>124</sup> (translated).

A few years after these brief positive allusions to the Pombaline period in the literary field, in 1833 the image of Pombal as a mythologized hero was consecrated. The event that marks this moment is the replacement of the medallion in the equestrian statue of D. José I by D. Pedro IV (1798-1834). However, the most emblematic work of philopombaline mythification process of was published in 1869 by the mason and law professor at the University of Coimbra, Manuel Emídio Garcia (1838-1904). Its title was *Marquês de Pombal: Lance d’Olhos sobre a Sua Ciência, Política e Administração; Ideias Liberais Que o Dominavam, Plano e Primeiras Tentativas Democráticas* [*The Marquis of Pombal: A Glance at His Science, Politics, and Administration; Liberal Ideas That Dominated Him, Plan, and First Democratic Attempts*]. It suggests that his historical figure is appropriate to serve causes that did not even exist at the time of D. José I, in a blatant example of anachronism. This paradigm reappears in similar works printed especially from 1882, the year of Pombal’s centenary<sup>125</sup>.

## THE POMBALINE CENTENARY

The celebrations of the first centenary of the Marquis of Pombal mark the main moment of his mythification. An intense propaganda of glorification emerged based on an anachronistic image of the minister of D. José as a precursor of liberalism and democracy. In addition to debates in the press and in political and academic circles, a large number of commemorative texts were produced and published, most of which were complimentary. As it is known, masonry played a relevant role in this process, given its interest in rescuing Pombaline anti-Jesuitism to combat the new outbreak of Jesuitism that, according to its members, was invading the country. Given that, the Council of the Order launched the idea of building a large monument in memory of the Marquis of Pombal. It used the Portuguese bulletin *Boletim Oficial do Grande Oriente Lusitano Unido*, series 1881-1882, to mobilize all its stores to search for and collect funds and sponsorships to make it happen. The plan, which generated controversial discussions in the press and among politicians and intellectuals, would only be carried out in the following century, in 1934, when the statue of the famous minister was inaugurated in the square of the rotunda, in the heart of Lisbon.

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<sup>124</sup> *Id., Ibid.*, p. 38.

<sup>125</sup> José Eduardo Franco and Annabela Rita, *Op. Cit.*, p. 39.

According to Bebiano<sup>126</sup>, the idea of celebrating Pombal's centenary came from the positivist Francisco Augusto Correia Barata (1847-1950), professor at the Faculty of Philosophy at University of Coimbra. The council of deans finally approved both the proposal and the program of university celebrations in a meeting with all the professors held on January 26, 1882.

The historical significance of such celebration, however, needs to be understood in relation to the political situation of Portugal in the end of the 19<sup>th</sup> century. This period was marked by debates, affiliations, and dissidences regarding terms such as Republic, Socialism, and Federation, particularly in the 1870s. Additionally, Portuguese writers began to oppose the romantics of the first hour and the idea of evolution from the historical, anthropological, and biological point of view. Some currents of thought decisively influence the Portuguese historians of this generation, especially Teófilo Braga (1843-1924) and Oliveira Martins (1845-1894): the positivism of Augusto Comte (1792-1857) and the utopian socialism of Proudhon (1809-1865), as well as the dialectic of Hegel (1770-1831), not to mention the historical materialism of Marx (1818-1883).

It is not surprising, therefore, that republican propaganda sought to appropriate the centenary celebrations of "national heroes" to publicize their postulates and ideas. This had happened to Camões' tercentenary in 1880, and it would happen again to Pombal's centenary in 1882 and the English Ultimatum in 1890. These events are key moments of the discursive construction of Portuguese nationalism. However, as Bebiano<sup>127</sup> holds, until the end of the century, when the Grand Orient's approach to the Republican Party was consolidated, men linked to monarchical and even socialist groups would remain linked to the Order for a long time. Therefore, at the time of the Pombaline centenary, Portuguese masonry encompassed a vast political range, but with two unifying traits: liberalism and anti-Jesuitism.

Akin to Portugal, the beginning of the 1880s in Brazil was marked by centenarians that agitated the academic, journalistic, and political circles of the Empire, especially in the court of Rio de Janeiro, namely: the tercentenary of Camões' death, on June 10, 1880; the centenary of the Marquis of Pombal, on May 11, 1882; and the quadricentennial of the "discovery" of India (1492-1898).

The republican positivists, many of whom were masons, and the Portuguese colony residing in Brazil were responsible for developing Pombal's centenary. As per Oliveira<sup>128</sup>,

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<sup>126</sup> Rui Bebiano, "O 1.º centenário pombalino (1882): Contributo para a sua compreensão histórica", *Revista de História das Ideias*, vol. IV, t. II, 1982, p. 424.

<sup>127</sup> *Id.*, *Ibid.*, p. 396.

<sup>128</sup> Sarah Luna de Oliveira, *A Exploração Simbólica do Brasil em defesa do Império Lusitano: Uma Análise das Comemorações Cívicas e da Literatura Escolar Portuguesa (1880-1960)*, Phd Thesis presented to the Universidade de Coimbra, Coimbra, policopied text, 2014, pp. 19-20.



the centenary festivities began to stand out as ritualistic practices with strong patriotic appeal in Europe from the end of the 19<sup>th</sup> century. In Portugal, names such as Teófilo Braga and Emídio Garcia became known as the first idealizers of centenary celebrations under the Comtian paradigm<sup>129</sup>. In this sense, civic commemorations consist in the sacralization of a certain version of the national past based on a specific event or historical personality.

The tercentenary of the death of Luís de Camões (1524-1580) was the most important one, as it reached an international dimension. In the Brazilian case, the initiative was due to the Portuguese community and the military positivists, leading to the resumption of Portuguese-Brazilian relations, which were shaken since the emancipation of the former colony in 1822. The participation of the Portuguese Royal Reading Cabinet had great repercussion, as evidenced by the testimony of Teófilo Braga. Four years later, he published an essay on the subject – entitled *Os Centenários como Synthese Affectiva nas Sociedades Modernas* [*Centenaries as Affective Synthesis in Modern Societies*] (1884) – and wrote, on the occasion, an article to the magazine *O Positivismo*. The edition he edited between 1878 and 1882 praises the initiatives of the Portuguese Royal Reading Cabinet, which, according to the famous Portuguese intellectual, “did more to the work of concord than fifty years of good diplomacy”<sup>130</sup> (translated).

Teófilo Braga is held responsible for the dialogue between positivists and Portuguese-Brazilian republicans on Camões’ tercentenary in Brazil. Oliveira<sup>131</sup> highlights that Miguel Lemos (1854-1917), from Rio de Janeiro and one of the directors of the Portuguese Royal Reading Cabinet, was also the founder of the Positivist Church of Brazil, in 1881. The author also points out that Teixeira Mendes (1855-1927), one of the “illustrious Brazilians” who, according to Teófilo Braga, had led the festivities, wrote the original text of the positivism-inspired republican calendar proposed to the provisional government in the beginning of the Republic.

According to the newspapers of the time and the testimony of Braga himself<sup>132</sup>, it was a very popular night with the presence of representatives of all the scientific and literary corporations of the court, in addition to charities, commerce, the press, parliament, municipality, army, and navy. The celebration the Portuguese Royal Reading Cabinet promoted was held at the D. Pedro II Imperial Theater. Joaquim Nabuco (1849-1910)

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<sup>129</sup> According to the author, Auguste Comte (1798-1857), in his *Système de Politique positive* (1851), “proposed – to replace the Christian religion – the institution of the Humanity religion, defined as the worship of this collective entity consisting of human beings from the past who have contributed, in their own singular ways, to historical progress” (*Id., Ibid.*, 2014, pp. 51-52, translated).

<sup>130</sup> Theophilo Braga, *Camões e o Sentimento Nacional*, Porto, E. Chardon, Lugan & Genelioux Sucessores, 1891, p. 291.

<sup>131</sup> Sarah Luna de Oliveira, *Op. Cit.*, pp. 64-65.

<sup>132</sup> Theophilo Braga, *Op. Cit.*, pp. 516-529.

opened the event with a speech, which later became an introduction to a play by Machado de Assis (1839-1908), written especially for that night – “Tu, só tu, puro amor” [“You, only you, pure love”] –, about the love between Camões and Catherina de Ataíde. After the performance, Carlos Gomes’ (1836-1896) composition, “Hynno triumphal a Camões” [“Triumphal anthem to Camões”], was presented as well.

The Cabinet also had a special edition printed to commemorate the tercentenary of Camões in Lisbon. An event that would have brought together thousands of people marked the following day: the rowing boat races at Botafogo. In the occasion, Emperor D. Pedro II himself awarded the prizes: 12 copies of the special edition of *Lusiadas* [*The Lusiad*] and a bronze medal coined by the Portuguese Royal Reading Cabinet.

In turn, Marquis of Pombal’s centenary was celebrated two years later and kept the Comtean model of worshiping great men of humanity. The celebration of a contradictory historical character such as Pombal raised doubts and controversies; unlike Camões, a consensual figure in the pantheon of Portuguese language and literature. Given that, Pombal’s name was used as a motto to exalt scientific advancement, as well as secularization and modernization in his government; meanwhile, the agenda was also to hide the negative or controversial points of his biography to celebrate him as one of the heroes of the Portuguese nation. Brazilian positivists and republicans, in addition to anti-clerical and anti-Jesuit monarchists, undertook the role of explaining and emphasizing the benefits of his governmental action to Brazil.

## JOSÉ PALMELLA AND THE INDIGENOUS POMBAL

One person seems to have gone further in this mission, the Portuguese José Palmella (1838-1932)<sup>133</sup>, who published a beautiful edition of his book *O Centenário e a Vida do Marquez de Pombal* [*The Centenary and Life of the Marquis of Pombal*]. The work was re-

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<sup>133</sup> We could find little about this writer. Much of the information obtained comes from the book to which we had access: the fourth edition, published in 1883, which includes annexes with “press judgments”, such as the one in *Diário de Santos* dated September 23, 1881. The latter presents a call entitled “distinguished guest” to announce the arrival of the “notable Portuguese publicist José Palmella” in the previous couple of days (In José Palmella, *O Centenario e a Vida do Marquez de Pombal*, 4<sup>th</sup> ed., Rio de Janeiro, F. A. Ferreira de Melo, 1883, p. 105). By this time, he had already published works like *A. de Lamartine, Esboço Biographico* [Biographical Sketch] (1870), *A Queda de Napoleão III* [*The Fall of Napoleon III*] (1870), *Aristocracia do Genio e da Beleza Feminil na Antiguidade* [*Aristocracy of the Genius and the Feminine Beauty in Antiquity*] (1871), *Victor Hugo, Seu Regresso a Paris depois de Dezoito Anos de Exílio ou Uma Página da Sua vida* [*Victor Hugo, His Return to Paris after Eighteen Years of Exile or a Page of His Life*] (1871), *Vida de Pedro Álvares Cabral* [*Life of Pedro Álvares Cabral*] (1889), among others. According to Sébastien Rozeaux (“Presença da ‘colônia portuguesa’ na paisagem cultural e midiática do Rio de Janeiro: O Grêmio Literário Português e o Retiro Literário Português (1855-1885)”, *Topoi*, vol. 17, no. 33, July/December 2016, pp. 506-507), he also was the vice-president of the Portuguese Literary Retreat in 1884, a society founded in 1859. Along with the Portuguese Literary Guild, founded in 1855, the institution initiated an

leased a year earlier in Rio de Janeiro, under the patronage of commander F. A. Ferreira de Mello. Its subtitle announces the author's motivation: "a biographical study on the life of Portugal's first political genius, adorned with a new portrait, some critical notes, and many interesting documents, which greatly honor the memory of the immortal grandfather of the Duke of Saldanha".

Unusually, José Palmella's book reveals a supposed indigenous – and therefore Brazilian – ancestry of Pombal. Consequently, the author opposed to two main arguments previously made: that of Senator Candido Mendes (1818-1881) in his work *Direito Civil e Ecclesiastico Brasileiro* [*Brazilian Civil and Ecclesiastical Law*] (1866), according to which D. José's minister was from Soure rather than Lisbon; and that of other authors, who claimed he was born in Brazil, as some of his relatives lived and married in Pernambuco. The author explains:

Reserving to explain Pombal's ancestry later in a special note, according to investigations the most authoritative historians chroniclers, and biographers carried out, we will only say briefly that his ancestry from his maternal side goes back to a leafy trunk of the most opulent and strong race of the Tupi people, sovereign ruler of other tribes, such as that of Cahetés, who inhabited the virgin forests in the early 16<sup>th</sup> century, which luxuriously crowned the front of the ancient Merim, today the poetic Olinda, in Pernambuco (translated)<sup>134</sup>.

This apparently improbable and very unlikely thesis reached the pages of newspapers, such as the edition of the periodical *A Construção*, from Ceará, on May 7, 1882, which sought to justify the celebration of Pombal's centenary in Brazil on the grounds of its alleged indigenous origins:

We, Brazilians, also have reasons not to be indifferent to the glories of the great minister. Pombal was descended, on his mother's side, from the indigenous Tabayara tribe, our compatriot, Maria do Espírito-Santo Arco Verde, of whom he was still, in a straight line, sixth grandson. To the Brazilian blood, which still ran very fresh in his veins and with which we can still very well rank him in the

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unprecedented editorial policy. The aim was to promote its activities, disseminating Portuguese culture and working towards closer Portuguese-Brazilian cultural exchanges.

<sup>134</sup> "Reservando para adiante explicar, n'uma nota especial a ascendencia de Pombal, conforme averiguações feitas pelos mais abalisados historiadores, chronistas e biographicos, diremos apenas, de passagem, que a sua ascendencia, pelo lado materno, remonta-se a um frondoso tronco da mais opulenta e forte raça dos Tupis, soberana dominadora das outras tribos, como a dos Cahetés, que habitavam no principio do século XVI, as florestas virginaes, que luxuosamente coroavam a frente da antiga Merim, hoje, a poetica Olinda, em Pernambuco" (José Palmella, *Op. Cit.*, p. 14).

famous gallery of our heroes, we must add the sympathies of his wise government towards us (translated)<sup>135</sup>.

The edition of the book to which we had access, the fourth, was dedicated to the Baron of Wildick, Pedro Afonso André de Figueiredo, General Consul of Portugal<sup>136</sup>. It also included “several added notes, which tend not only to clarify many doubtful points, but to refute numerous errors committed by the distinguished writers: Pinheiro Chagas, Innocencio da Silva, Ramalho Ortigão, and others, no less notable in the literary and scientific sphere” (translated)<sup>137</sup>. The author reproduces other newspaper notes as if he wrote them, given the similarity of the texts. These are the cases of *Jornal do Commercio*, of *Província de São Paulo*, and *Correio Paulistano* between January and May 1882.

In the preface of the 1883 edition, entitled “To the reader”, Palmella justified why over a thousand copies of his work’s fourth edition with the Marquis’ portrait were distributed to private institutions and libraries, as well as the disappearance of 600 volumes. The author’s arguments refer to claims of being the first one to write and speak in public about the festivities of the Pombaline centenary, advertising his book and giving lectures in several cities in the provinces of Rio de Janeiro, São Paulo, and Minas Gerais, as evidenced by the newspaper notes annexed to the end of the book. The money obtained from public lectures, according to him, was donated to help female education at the Lyceum of Arts and Crafts, given that he had been convinced eighteen years before that “without the education and instruction of women, there can never be true civilization” (translated)<sup>138</sup>.

Nonetheless, his campaign in favor of the Pombaline centenary did not bring him only praise. His detractors and opponents, whose opinions he considers “foolish and stupid”, are not forgotten in his preface nor in the course of his biographical narrative. Palmella constantly refutes assertions and assumptions of several authors, especially Ramalho Ortigão and Pinheiro Chagas, two renowned names of Portuguese language and literature<sup>139</sup>.

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<sup>135</sup> “Nós, brasileiros, temos também motivos para não sermos indiferentes às glórias do grande ministro. Pombal descendia, pelo lado materno, da índia da tribo tabayara, nossa compatriota, Maria do Espírito-Santo Arco Verde, de quem vinha ainda a ser, em linha recta, sexto neto. Ao sangue brasileiro, que ainda lhe corria muito fresco nas veias e com o qual ainda podemos muito bem enfileirar-o na famosa galeria dos nossos heróis, tem que acrescentar as sympathias do seu sábio governo para conosco” (*apud* Sarah Luna de Oliveira, *Op. Cit.*, p. 86).

<sup>136</sup> As per the author’s indication, he delivered a lecture entitled “The political and humanitarian spirit of Marquis of Pombal” at the Portuguese Gymnastics Club, with the presence of the illustrious general consul of Portugal in Brazil on the night of September 3, 1881. There are some press notes at the end of the book proving it (*José Palmella, Op. Cit.*, p. X).

<sup>137</sup> *Id., Ibid.*, p. VII.

<sup>138</sup> *Id., Ibid.*, p. VIII.

<sup>139</sup> The same criticisms and complaints appear in the preface of the third edition, dated August 16, 1881. Opponents here are considered “low-flying bumblebees always ready to fly against everyone, who do not

On the other hand, he thanks all the court clubs that promoted festivities in honor of Pombal, such as that of Guanabara, that of Portuguese Gymnastics, and the Portuguese Gymnastic Congress. His descriptions of the festivities are grandiloquent and hyperbolic, which is why they are unreliable. For instance, the author states that the Pombaline celebrations “let out of sight everything that was most brilliant in the tercentenary of the epic immortal Luiz de Camões”. He also takes the opportunity to attack the “ultramontane” opponents:

These sumptuous festivities provoked the wrath of reactionaries, hypocritical carolism, and ultramontanes; the events made them roar, blaspheme, and tamper with historical facts, commit anachronisms, quote French authorities without discretion... they tried everything; however, they eventually trembled, retreated, and quickly went crawling towards the stained necropolis of their mortuary ideas, and there they waited for the resurrection of the Inquisitorial Lazarus, which is the negation of all progressive evolutions that can lead the human spirit to the luminous spheres of civilization (translated)<sup>140</sup>.

Like Denis and Garrett, Palmella highlights the development of literature, due to the new influxes of the Pombaline period, when he takes the opportunity to severely criticize Ramalho Ortigão and his *Farpas* [*Sarcastic Comments*] for chronological errors and for not understanding the spirit of Pombal’s time. The expulsion of the Jesuits and the closing of their schools would not represent decadence because many localities were left without classes, in the kingdom, and in the colonies, due to the small number of qualified teachers with the new method and registered by the State. Rather, they would have meant an advancement in terms of method and content, with the arrival of new knowledge and disciplines. In addition to taking care of the education of the people with the reforms of minor studies of 1759 and 1772, Pombal would not have forgotten the wealthier classes, to which the foundation of the Royal College of the Nobles in 1761 is proof. The institution dignified military instruction and propagated, at least for the few students enrolled, knowledge of experimental science and modern foreign languages, such as English and French.

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have, in their thick lips, the white laughter of their impertinent and rash pretensions, endorsed by their burlesque idleness” (*Id., Ibid.*, p. XII, translated).

<sup>140</sup> “Estas sumptuosas festas provocaram a ira dos reacionários, do carolismo hypocrita, e dos ultramontanos; ellas fizeram com que eles rugissem, blasfemassem, adulterassem os factos historicos, cometessem anachronismos, citassem autoridades francezas sem criterio, de tudo lançaram mão; mas, afinal tremeram, recuáram e foram-se em sobressaltos rastejando para a tisonada necropole de suas mortuarias ideias, e ali esperarem pela ressurreição do Lazaro Inquisitorial, que é a negação de todas as evoluções progressivas, que podem conduzir o espirito humano para as luminosas esferas da civilização” (*Id., Ibid.*, p. IX).

In the last part of the book, the author emphasizes Pombal's liberal and "democratic" role, listing a series of charters that demonstrate that his governmental action was powerfully directed towards ending prejudice, such as that existing between new and old Christians, or in relation to indigenous groups from Brazil and black people from Portugal. His fall and decay are seen as unfair, as is the usurpation of his remains by French soldiers and the withdrawal of his medallion from the equestrian statue of D. José I. After his death, Portugal would have been dominated again by the inquisitorial brotherhood, protected by the queen, and soon returned to the state of decay in which it was in the reign of D. João V: "Pombal will shine, therefore, always, always, through history as a great star of light, which, honoring the century in which he lived, will illuminate his country, leading it to the apogee of material greatness, and of scientific and political glory" (translated)<sup>141</sup>.

The Pombaline centenary was also celebrated in the provinces of São Paulo and Pernambuco. The newspaper *A Província de São Paulo* published two articles – one by Joaquim Saldanha Marinho (1816-1895) and another by Teófilo Braga, to "honor the memory of one of the greatest reformers of the century". In its edition of May 9, 1882, the periodical reported that the parties in the capital began at Dawn and included both rocket salvos and music bands. In the afternoon, there was a "march" with the presence of several corporations, while many people would have appeared for a well-attended *marche aux flambeaux* at night, with the main streets illuminated. The gala ball, scheduled to happen at the hall of Gymnastic Club, would take place that night<sup>142</sup>.

As in Camões' tercentenary, the Portuguese Royal Reading Cabinet of Recife organized the Pombaline centenary celebrations in the capital of Pernambuco. In addition to the program especially organized for the occasion, the Portuguese institution launched a commemorative book in honor of the Marquis' figure, published by Tipografia Industrial in 1882, with the minister's portrait painted by the Portuguese artist G. Barradas: *O Marquez de Pombal – Commemoração do Primeiro Centenário de Sua Morte pelo Gabinete Portuguez de Leitura em Pernambuco* [*The Marquis of Pombal – Celebration of the First Centenary of His Death by the Portuguese Reading Office in Pernambuco*]. Its author, A. de Souza Pinto, stated in the work's introduction:

The festivities of the Marquis of Pombal's centenary currently being prepared have a very high national and human significance. The life of this famous statesman was filled with beneficial deeds. Fine administrative tact; extraordinary energy and tenacity; clear understanding of the contemporary European political situation and particularly of the most urgent needs of the context of his activities; laced with patriotism and exemplary probity: these are the eminent attributes of the great man

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<sup>141</sup> *Id., Ibid.*, p. 89.

<sup>142</sup> *Apud* Sarah Luna de Oliveira, *Op. Cit.*, p. 90.

who mastered the effects of the lamentable decadence of his country for a moment; here is the very distinct individuality of the minister of King D. José. More than a direct benefactor to his homeland, of which we will give brief notice in the course of this short study, the Marquis of Pombal must be acknowledged among the sagacious statesmen of the modern era. The latter, as Beesly excellently puts, used convenience in their time to maintain the political unity of the West, a unity that today allows the spiritual domain of positive philosophy and the consequent replacement of the anarchic and agitated state of modern societies by the definitive establishment of an industrial civilization, enlightened by science and embellished by art (translated)<sup>143</sup>.

However, the most important initiative of the Pombaline centenary in Brazil undoubtedly was that of the Guanabara Rowing Club of Rio de Janeiro, which took place at Pedro II Imperial Theater on May 8, 1882. The *Program* of commemorations, prepared on May 3, 1882 by the “Grand Executive Committee for the Commemoration of the Marquis of Pombal’s First Centenary”, was made available on the 7<sup>th</sup> of the same month in *Gazeta de Notícias*. The festivities were celebrated on the 8<sup>th</sup>, 11<sup>th</sup>, and 14<sup>th</sup> of May. On the 8<sup>th</sup>, at noon, the lounge of the Guanabara Rowing Club resided a solemn session presided over by the minister of the Empire – probably Manoel Pinto de Souza Dantas (1831-1894), who temporarily occupied the position of the Baron Homem de Mello (1837-1918). The main authorities of the Empire were likely invited to the event: “foreign diplomatic and consular corps, scientific and literary societies, representatives of the press and commerce, the Academic Congress, and those who usually participate in these solemnities”. Next, commemorative medals that had been engraved for the celebration of the Pombaline centenary were distributed, and a speaker read the list of people and cor-

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<sup>143</sup> “O centenário do Marquez de Pombal, cujas festas presentemente se preparam, tem por sua vez elevadíssima significação nacional e humana. A vida desse famoso estadista foi provida de acções benéficas. Fino tacto administrativo; energia e tenacidade fora do comum; clara intelligencia da situação política da Europa sua contemporânea e, particularmente, das necessidades mais urgentes do meio onde a sua actividade exerceu; acrysolado patriotismo e exemplar probidade, eis os predicados eminentes do grande homem que por um momento conseguiu dominar os effeitos da lamentável decadência do seu paiz; eis a distinctíssima individualidade do ministro do rei D. José. A mais dos beneficios directos feitos á sua pátria, e dos quais se dará breve notícia no correr deste breve estudo, o Marquez de Pombal deve ser contemplado no numero de sagazes estadistas da era moderna, que, como excellentemente diz Beesly, pelo emprego de meios convenientes no seu tempo, souberam manter a unidade pollitica do occidente, unidade que hoje faculta o domínio espirital da philosophia positiva e a substituição consequente do estado anarchico e agitado das sociedades modernas pelo estabelecimento definitivo de uma civilização industrial, esclarecida pela sciencia e embelezada pela arte” (*apud* Sarah Luna de Oliveira, *Op. Cit.*, p. 91).

porations to which 50 copies of a special edition of a book to be printed in the National Press of Lisbon would be offered (translated)<sup>144</sup>.

The national anthem was reproduced at the opening of the session, and a marching band played songs during the signing act, as well as the Portuguese anthem at the end of the ceremony. In the evening, at 8 pm, there was a literary and musical soiree at Pedro II Imperial Theater, in addition to a lecture by Rui Barbosa (1849-1923), at the time general deputy of the Empire, and a concert with conductor Leopoldo Miguez (1850-1902), republican and future composer of the anthem of the Proclamation of the Republic, as well as the patron of chair 23 of the Brazilian Academy of Music. A hundred most excellent ladies of the high society of the court and “a hundred amateur gentlemen” performed the “singing part of the soiree”. On the night of May 11, there was a music festival in the garden of Campo da Aclamação, specially decorated for the occasion, with 150 musicians from different marching bands. An allegorical monument was also raised, with two statues representing Portugal and Brazil, the figures of fame and glory, and the bust of the Marquis of Pombal. Finally, on the 14<sup>th</sup>, at 4 pm, at Botafogo bay, a regatta for amateurs and professionals took place, along with prize giving to the winners and fireworks at night. The detailed programs of each of the festivities would be given in due course (translated)<sup>145</sup>.

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<sup>144</sup> João Paulo Papassoni, *Uma Perpétua Lida: Estudo sobre A Derradeira Injúria, de Machado de Assis*, Master’s dissertation presented to the University of São Paulo, São Paulo, policopied text, 2018, p. 17. According to information in the book’s 1885 edition, the distribution list of 50 unique numbered copies in “What-man paper” included first the name of Emperor of Brazil D. Pedro II (1825-1891), and the second was that of D. Luís I (1838-1889), king of Portugal. The institutions encompassed the Public Library of Rio de Janeiro, the Portuguese Reading Office, and European libraries, such as those of the University of Coimbra, Lisbon, Porto, London, Madrid, Paris, Florence, among others. Besides this work, three other books commemorating the Pombaline centenary were published by the Guanabara Rowing Clube: *Homenagem ao Marquês de Pombal [Tribute to the Marquis of Pombal]*, edited and printed in Porto in 1882; a poetry collection edited and printed in Rio de Janeiro, whose copies were distributed at D. Pedro II Theater on the night of the main ceremony; and the *Discurso Pronunciado a 8 de Maio de 1882 [Speech Delivered on May 8, 1882]*, by Rui Barbosa, at the opening of the ceremony, printed by the typography of G. Leuzinger & sons in the same year.

<sup>145</sup> *Apud* João Paulo Papassoni, *Op. Cit.*, pp. 17-18.



## RUI BARBOSA'S SPEECH

Rui Barbosa's speech was published that same year, 1882, by the typography of Q. Leuzinger & Filhos at the request of the Guanabara Rowing Club. The text of the famous orator from Bahia draws attention to its grandiloquent character, with inverted syntax, profuse adjectives, and literary references – particularly to Camões and Shakespeare. In long periods of rhythm and sounds meticulously planned to please the ear, the horrifying scenes of the Lisbon earthquake of 1755 are described in vivid colors, from which the heroic figure of Pombal emerges, wrapped in epic scenes from Greek mythology and modern literature. It is important to note that, in the same rhetorical praising movement, the author demonizes, albeit indirectly, the “ominous influence” of the Jesuits, who came to have a preponderant role throughout the Portuguese Empire in the reign of King João III (1502-1557):

But the unalterable impassive colossus secretary of justice and reparation amidst the ruins promises himself, within the general devastation, to multiply the lost wealth, to restore the nation alienated by corrupting oppressions, to reinstate the authority of a scepter that D. João III had abdicated in the hands of an ominous influence. The Greek fable represented the wheezing under the roots of Etna, under the granite of the burning mountains, the enormous children of Heaven and Earth, attackers of the god of gods: one would say that, for the first worker, the earthquake had come to disembowel the arm of one of those powers fulminated by ancient usurpation, the soul of a Titan, from the mysterious nucleus of the planet (translated)<sup>146</sup>.

Starting his biographical narrative, he warns his listeners that Pombal is not a person, but “an age, an anticipation of the future, although not unscathed from the inevitable flaws of his time”. Then, he comments a little on what has been written about his origin, upbringing, and education to praise inordinately, considering the current bibliography on the subject, his role as a diplomat in London and Vienna during the reign of D. João V, until his accession as minister in 1750, when D. José I claimed the throne. Amid the moral and economic decay attributed to the previous period, marked by an indolent and debauched monarch and a corrupt and corrupting clergy, Sebastião José appears not only

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<sup>146</sup> “Mas o inalterável secretario colosso impassível da justiça e da reparação entre ruínas, promete a si mesmo, entre a devastação geral, multiplicar-lhe a riqueza perdida, restituir-lhe a nação alienada por opressões corruptoras, reintegrar-lhe a autoridade de um sceptro que D. João III abdicara nas mãos de uma influencia ominosa. A fabula grega representava os arfantes debaixo das raízes do Etna, sob o granito das montanhas incendiadas, os filhos enormes do Ceo e da Terra, acommettedores do deus dos deuses: dir-se-hia que, para primeiro operario, o terremoto viera desentranhar do seio mysterioso do planeta o braço de uma dessas potencias fulminadas pela usurpação antiga, a alma de um Titão” (Ruy Barbosa, *Centenario do Marquez de Pombal: Discurso Pronunciado a 8 de Maio de 1882* [...], Rio de Janeiro, Typ. de Leuzinger & Filhos, 1882, pp. 11-12).

as a redeemer, but also a precursor of the 19<sup>th</sup> century in its main aspirations. This is how he reacted against the British, forbidding cash export, establishing conditions for wine-making, and organizing large trading companies.

When listing his economic measures, Barbosa even states that, despite contradictions, the orientation of D. José's minister was liberal, reproducing the anachronistic argument Emídio Garcia initiated and which most Portuguese philopombalists at that time repeated<sup>147</sup>. Although the effective results of his radical protectionism did not correspond to the efforts made, such initiatives would have been a foreshadowing of what would later be developed in other nations, because, according to the author, the minister of D. José was very updated for his time:

Undoubtedly, these measures seem to obey a prejudice: the reliance on protectionism. This prejudice, however, was all the more natural, as it imbued, so to speak, the entire past century and still, to a large extent, the current century. Statesmen like Sully, Colbert, Necker, and Bonaparte deeply resented this false conception. Locke still believed in the balance of *trade theory*. Almost all the European governments had closed the precious metals out. Of the contemporaries who hated the most, and those who most admired the great minister, liberalists and apologists alike adhered to Pombal's prohibitory edict. They talk about Quesnay, in Turgot, in Adam Smith! But the main protectionist acts of the Portuguese minister were enacted between 1752 and 1756. It was not until 1756 that Quesnay's economic doctrines came to light for the first time in the *Encyclopedia*. The truths Turgot taught concerning the freedom of cereals circulation did not pass through the criterion of experience, but with his intendance of Limoges in 1761 and his ministry in 1774, in the midst of vigorous resistance; and there was so much disbelief that, even after this test, the ignorance of his time attributed to him the penury of 1775. As for Adam Smith, it was only in 1776 that his book *The Wealth of Nations* was published (translated)<sup>148</sup>.

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<sup>147</sup> *Id., Ibid.*, pp. 13, 29.

<sup>148</sup> "Sem duvida essas medidas parece obedecerem a um preconceito: a confiança no proteccionismo. Esse preconceito, porém, era tanto mais natural, quanto imbuiu, por assim dizer, todo o seculo passado, e ainda, em grande parte, o seculo actual. Estadistas como Sully, Colbert, Necker, Bonaparte resentiram-se profundamente dessa falsa concepção. Locke ainda acree-ditava na theoria da balança commercial. Quasi todos os governos europeus tinham vedado sahida aos metaes preciosos. Dos contemporaneos que mais odiaram, e dos que mais admiraram o grande ministro, libellistas e apologistas adheriram igualmente ao edicto prohibitorio de Pombal. Fallam em Quesnay, em Turgot, em Adam Smith! Mas os principaes actos proteccionistas do ministro portuguez se decretaram entre 1752 e 1756. Ora, só em 1756 sahiram, pela primeira vez, a lume, na *Encyclopedia*, as doutrinas economicas de Quesnay. As verdades ensinadas por Turgot ácerca da liberdade de circulação dos cereaes não passaram pelo criterio da experiencia, senão com a sua intendencia de Limoges em 1761 e o seu ministerio em 1774, no meio de resistencias vigorosas; e tanto não estavam acreditadas, ainda após essa prova, que a ignorancia de seu tempo lhe attribuiu

When approaching the expulsion of the Jesuits, Rui Barbosa practically repeats the discourse of the Pombaline “anti-Jesuit catechisms”, which, according to Franco<sup>149</sup>, establishes the myth of the Jesuits in Portugal under the production of anti-Jesuit documentation in the ministry of the Marquis de Pombal and under his supervision<sup>150</sup>. Therefore, in condemning D. João III once again for having handed over the kingdom to them in 1540, he briefly describes the damage caused to the “official education” by the priests of the Society of Jesus. As per the speaker, Loyola’s Order use pedagogy and faith as instruments of their policy, which sought to govern states through the possession of souls, replacing freedom with obedience, intelligence with trust, conscience with confession, morality with probabilism, and religious feeling with pietism:

Grammar, rhetoric, scholasticism, casuistry: these are the elements of that formal gymnastics, which current generations of the Society still confess to be the program of their schools. Their underlying principle is the tremendous thought to kill the psychological life of individual faculties and the intimate personality of a man under a regimen of automatic movements, gutted by the habit of an ingenious and persevering discipline (translated)<sup>151</sup>.

The minister’s cruelties and authoritarianism are minimized and justified by the obscurantism of the time, which could not lead to humanitarian results without barbarism.

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a penuria de 1775. Quanto a Adam Smith, só em 1776 se deu a prélo o seu livro *Da riqueza das nações*” (*Id., Ibid.*, pp. 25-26).

<sup>149</sup> José Eduardo Franco, “Os catecismos antijesuíticos pombalinos: As obras fundadoras do antijesuítismo”, *Revista Lusófona de Ciência das Religiões*, year IV, no. 7/8, 2005, p. 247.

<sup>150</sup> The author considers five works as Pombaline anti-Jesuit catechisms, “given their programmatic meaning, their condensation of arguments, their definition of a discursive style, their assumption as an inspiring reference, their national and international dissemination, and their reception and impact on the Portuguese culture of the time and posterity”: *Relação Abreviada da República Que os Religiosos Jesuítas das Províncias de Portugal, e Espanha, Estabeleceram nos Domínios Ultramarinos das Duas Monarquias [...]* [*Abbreviated List of the Republic That the Jesuit Religious of the Provinces of Portugal and Spain Established in the Overseas Domains of the Two Monarchies [...]*] (1757); *Erros Ímpios, e Sediciosos Que os Religiosos da Companhia de Jesus Ensinarão aos Reos, Que Forão Justicados, e Pretenderão Espalhar nos Póvos destes Reynos* [*Impious and Seditious Errors That the Religious of the Society of Jesus Taught to the Defendants, Who Were Judged, and Intended to Spread among the People of these Kingdoms*] (1759); *Dedução Cronológica e Analítica [...]* [*Chronological and Analytical Deduction [...]*] (1767-1768); *Compendio Historico do Estado da Universidade de Coimbra no Tempo da Invasão dos Denominados Jesuítas* [*Historical Compendium of the State of the University of Coimbra at the Time of the Invasion of the So-Called Jesuits*] (1771); *Regimento Pombalino do Santo Ofício [...]* [*Pombaline Regiment of the Holy Office [...]*] (1774) (*Id., Ibid.*).

<sup>151</sup> “A grammatica, a rhetorica, a escolastica, o casuismo: eis os elementos dessa gymnastica formal, em que os geraes da Ordem ainda hoje confessam consistir o programma das suas escolas, e cujo tremendo pensamento é matar a vida psychologica das faculdades individuaes, a personalidade intima do homem, sob um regimen de movimentos automaticos, enviscerados pelo habito de uma disciplina engenhosa e perseverante” (Ruy Barbosa, *Op. Cit.*, pp. 36-37).

This argument is necessary to prepare listeners – and later readers – to the great revolution of the Portuguese statesman in the field of social reforms: “his reorganization of teaching”, which included what the author calls “popular instruction” and the dissemination of science. The following measures are listed as responsible for replacing the outdated Jesuit pedagogy, already severely criticized by Luís António Verney (1713-1792), in his *Verdadeiro Método de Estudar* [*True Method of Studying*] (1746), for what was most modern in Europe: reform in humanities teaching (1759); foundation of the Royal College of the Nobles (1761); creation of 837 chairs for primary and secondary education (1772); and, finally, reform of the University of Coimbra (1772).

Moreover, Pombal is also characterized as a defender of the freedom of the Indians, due to his laws of 1757 and 1758. They proposed the following: encouraging the education and literacy of Brazilian indigenous peoples; promoting mixed marriages between Portuguese subjects and “natives”, who should not experience the prejudice of being classified as “blacks” not to be confused with African slaves; and abolishing slave trade in 1761 and slavery in Portugal in 1773. Rui Barbosa ends his encomiastic portrayal by placing Pombal in a timeless and anachronistic dimension as a philanthropist, liberal, and abolitionist. In order not to appear condescending or partial towards the honoree, the famous speaker justifies himself to his listeners/readers:

Gentlemen, your policy has sometimes had an expression of impiety and ferocity. But must we sentence him in the light of the sentiments and customs of the 19<sup>th</sup> century? For the insolent gentleman of his time, the life of a servant or a commoner was worth no more than an instant of anger, or a movement of spite. In face of the doctrines of clerical fanaticism in those days, the protection of the laws to the life of the heretic was a scandal. The confessional could not absolve resistance against the mystical orgy, against immorality under the hideous forms of that time. It was up to the great minister to fight against this monstrous accompaniment (translated)<sup>152</sup>.

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<sup>152</sup> “Senhores, a sua politica teve algumas vezes uma expressão de impiedade e fereza. Mas é á luz dos sentimentos e costumes do seculo XIX, que o havemos de sentencear? Para a insolente fidalguia da sua época a vida de um famulo ou de um plebeu não valia mais que um instante de colera, ou um movimento de despeito. Ante as doutrinas do fanatismo clerical, naquelles dias, a protecção das leis á vida do hereje era um escandalo. O confessionario só não absolvía a resistencia contra a orgia mystica, contra a immoralidade sob as hediondas fórmias daquelle tempo. Ao grande ministro coube lutar contra esse acompadramento monstruoso” (Ruy Barbosa, *Op. Cit.*, pp. 76-77).

## THE COMMEMORATIVE WORK OF THE GUANABARA ROWING CLUB

The book *O Marquês de Pombal. Obra Comemorativa do Centenário de Sua Morte* [*The Marquis of Pombal. A Work Commemorating the Centenary of His Death*], edited by the Guanabara Rowing Club of Rio de Janeiro, was only published by the National Press in 1885, in Lisbon, in a luxurious edition of 727 pages, including the index<sup>153</sup>. In December 1881, however, the press discussed the project. According to Papassoni<sup>154</sup>, the newspapers of the time enthusiastically reported the preparations for the ceremony and recognized the effort that went into the endeavor to produce such an exquisite volume. The first news the researcher found announcing the elaboration of this work was made in 1881, on December 15, and appears on page 2 of the *Gazeta de Notícias* of Rio de Janeiro.

The long-awaited piece reproduces a famous portrait of Pombal by Antônio Onofre Schiappa Pietra (1802-1878) on the title page, in addition to the publication indications on the following pages, including a list of the members of the Executive Committee, the list of collaborators and the 50 personalities and institutions that would receive a special edition of the book<sup>155</sup>. The index on the final page indicates that it is divided into two parts. The first presents an unsigned 515-page historical-biographical essay about the Marquis of Pombal, which was apparently written by José Maria Latino Coelho (1825-

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<sup>153</sup> The “Great Executive Commission of the Marquis of Pombal’s first centenary celebration in Rio de Janeiro” was composed of the following personalities: Barão do Rio Bonito (president); Viscount de Sissello (vice-president); Commander Frederico Gustavo de Oliveira Roxo (vice-president); Antonio Pollo (secretary); Frigate captain Luís Filipe de Saldanha da Gama (secretary); Commander Antonio Thomaz Quartim (treasurer); Viscount de Arcozello (treasurer); Commander Antônio José Ricões; Dr. Antonio Zeferino Candido (responsible for editing); Antônio Joaquim Xavier de Farias; Antonio Pinto da Silva; Antônio José Marques de Abreu Junior; Alfredo Ignacio de Abreu Soares; Bernardo José de Andrade; Dr. Carlos Augusto de Miranda Jordão; Eduardo José de Almeida e Silva; Ernesto Werneck Teixeira de Castro; Eugênio José de Almeida e Silva; Francisco José Correia Quintella; Dr. Hermogenes Pereira da Silva; Commander João Francisco Fróes da Cruz; João Luiz Tavares Guerra; Joaquim Henrique da Costa Reis; José de Miranda Monteiro de Barros; Dr. Thomás Alvez Junior; Dr. Ruy Barbosa (speaker); and Leopoldo Américo Miguez (music director).

<sup>154</sup> João Paulo Papassoni, *Op. Cit.*, p. 12.

<sup>155</sup> According to João Paulo Papassoni (*Op. Cit.*, p. 25), “In the annotation of the bibliographic and iconographic catalog of the Marquis of Pombal organized by the National Library of Lisbon, there is a difference in size between the two editions presented there, which demonstrates the printing variation. In Brazil, the only viable copy for consultation, which we found and which could belong to the first series, is located in the Portuguese Royal Reading Cabinet, in Rio de Janeiro. On a recent visit to the Cabinet, we were able to verify the existence of this copy of the first series, which differs greatly from the more common volume that can be found in second-hand bookstores and other libraries. As annexes 1 to 7 in the last section of this work show, the most evident differences are: size; triple square of the luxury copy and single square of the first consulted copy; numbering of the deluxe copy, especially copy number 10, intended for the Portuguese Royal Reading Cabinet, which coincides with the distribution list that appears in the book” (translated).

1891), an important reference among Brazilian intellectuals of the time. Meanwhile, the second part gathers several articles, two of which were in foreign languages – one in German, signed by the German historian George Weber (1808-1888) and the other by the Italian linguist and orientalist Angelo de Gubernatis (1840-1913). Contributions from Portuguese authors include texts of Oliveira Martins, Emídio Garcia, Júlio Xavier de Mattos (1856-1922) – born in Rio de Janeiro, raised and trained as a psychiatrist in Portugal – and, of course, Teófilo Braga. The list of Brazilians in the project is not limited to Rui Barbosa, who had the text of his opening speech published separately, as previously discussed, it included Silvio Romero (1851-1914), the jurist Tomás Alves Junior (1830-1895), Henrique Correia Moreira, Portuguese naturalized Brazilian in 1857, the president of the Bank of Commerce and director of the newspaper *O Cruzeiro*, and, finally, Machado de Assis (1839-1908).

In the midst of an abundant and sonorous adjectivation, along with sentences of inverted and stilted syntax permeated by erudite historical and literary references, the Marquis of Pombal's imposing figure appears in Latino Coelho's text. The minister is portrayed as simultaneously despotic and revolutionary, as a terrible opponent of aristocratic arrogance and the clerical power. His emergence in the country's political scene is seen as a necessity and even a remedy for the evils afflicting the kingdom. Based on this perspective, despite "apparent contradictions", he enters the same pantheon where D. João II (1455-1495), Richelieu (1485-1642), and Oliver Cromwell (1599-1658) are found<sup>156</sup> (translated).

The title of the article that opens the second part of the book, written by Henrique Corrêa Moreira, speaks for itself: "Sebastião José de Carvalho e Mello: O eminente propulsor da evolução social em Portugal no século XVIII" ["Sebastião José de Carvalho e Mello: The eminent driver of social evolution in the 18<sup>th</sup>-century Portugal"]. Strictly following the Comtian precepts regarding centenarians, the author mentions the tercentenary of Camões and declares that the veneration of "truly great" men imposes itself spontaneously, reaching the "conscience" of both the intellectually gifted and the "crudest". The "new era", for him, had been inaugurated on July 14, 1789, with the French Revolution, a model for all European nations. However, the so-called "modern aspiration" emerged with some enlightened monarchs and rulers, such as Frederick II from Prussia (1712-1786), Catherine the Great from Russia (1729-1796), Joseph II from Austria (1741-1790) and, occupying the first place in this illustrious pleiad, Sebastião José de Carvalho e Melo. In this sense, he clearly states that Pombal is the precursor of the 1789 revolution<sup>157</sup>.

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<sup>156</sup> Latino Coelho, "O Marquez de Pombal", in *Marquez de Pombal: Obra Commemorativa do Centenário da Sua Morte Mandada Publicar pelo Club de Regatas Guanabareense do Rio de Janeiro*, Lisbon, Imprensa Nacional, 1885, p. 21.

<sup>157</sup> Henrique Corrêa, "Sebastião José de Carvalho e Mello: O eminente propulsor da evolução social em Portugal no século XVIII", in *Marquez de Pombal: Obra Commemorativa do Centenário da Sua Morte Mandada Publicar pelo Club de Regatas Guanabareense do Rio de Janeiro*, Lisbon, Imprensa Nacional, 1885, p. 6.

The next chapter of the book is reserved for a set of fourteen metered sonnets, rhymed and signed by none other than Machado de Assis, who entitles them “A derradeira injúria” [“The last insult”]. In the year before the commemoration of the Pombaline centenary, he had published his most important novel, *Memórias Póstumas de Brás Cubas* [*The Posthumous Memoirs of Brás Cubas*]. As in all the poetic work of the famous chronicler, short story writer, and novelist, the above-mentioned poem applies all the stylistic refinement of the classics. In addition to the title, it has an epigraph – “E ainda, nymphas minhas, não bastava [...]” [“And still, my Nymphs, ‘twas not enough”] (verse VII, stanza 81, from *Os Lusíadas*, by Camões) – and numbers the sonnets from I to XIV, in logical sequence. The sort of versified narrative makes the reading of each sonnet separately difficult to understand the work completely.

The funeral tone, the theme of the “great minister”, the metered and rhymed structure, the present tense of the lyrical self, and the historical moment are revealed to the reader in Sonnet I. In the first quartet, the scenario of the main action of the poem is drawn: the coffin where the mortal remains of the Marquis of Pombal were deposited, at the Church of Our Lady of Cardal. The historical moment, in turn, is outlined in the second quartet: the French invasion of Portuguese territory, which began in 1810, under the command of Marshal André Masséna (1758-1817). By exploring the feeling of injustice caused by desecration, the poet reminds us that the old Marquis had already suffered enough during his life, when they took away his power, his honor, and subjected him to the torture of having to respond to a process already sick, at the end of life. At the same time, it prepares the ground for the final sonnet, which approaches “the last injury” the minister suffered.

Do you see a coffin laid in a lonely church?  
This dust that rests, and hides, and disappears,  
It bears the formidable name of a great minister,  
That in lively letters of gold and tears flames

A squalid invasion forms outside,  
Like a hungry sea of misery and mourning  
And for new beaches seeking and new beaches earning,  
As the crowd, retreating, would fight.

The Gauls as pursuers, the Brits as defenders,  
Two hands of a fate implacable and occult,  
They will bleed the exhausted nation that surrenders;

Among the dead in history, a single force  
It does not resurface; from a Pacheco, a Castro no answers;

And greed collects the spoils of insult.  
(translated)<sup>158</sup>

As per Papassoni<sup>159</sup>, who formally analyzes the poem in his Master's thesis from a detailed interpretive perspective, "A derradeira injúria" ["The last insult"] dramatically presents two voices. The first one is represented by the lyrical self, marked by the use of the grammatical third person to depict the present time. The second, on the other hand, is the one that appears when the lyrical self's gaze is interrupted between sonnets III and IX. The same author notes a very big difference between Machado's attitude in Camões' tercentenary and in the Pombaline centenary. For the first event, he wrote the play "Tu, só tu, puro amor" ["You, only you, pure love"], about the courtly love affair between Camões and D. Catarina de Ataíde, which even the Emperor D. Pedro II (1825-1891) noticed. Moreover, he composed four sonnets dedicated to the Portuguese poet. Such sonnets were published in commemorative editions of the tercentenary and selected by Machado to later be included in the volume of *Poesias Completas* [*Complete Poetry*], published in 1901. As for the Pombaline centenary, he seems to have wanted to exempt himself, given that Pombal was (and still is) not a consensual figure like Camões. Indeed, some disputes about the festivities were already taking place in the literary circles and in the press from Rio de Janeiro.

The fact is that, so far, there is no record of the participation of the famous poet, short story writer, and novelist in the ceremonies. Likewise, the author does not contribute to the volume of poetry that was distributed then, which featured poets such as Bocage (1765-1805), Basílio da Gama (1741-1795), and the contemporary Adelina Amélia Lopes Vieira (1850-1923). Besides, Machado's participation was not confirmed until December 28, 1882 in an article in the newspaper *A Folha Nova*, and the *Cosme Velho* wizard did not include the poem in his *Poesias Completas* [*Complete Poetry*] (1901)<sup>160</sup>. The very tone of the sonnets and the ambiguous character of many of its statements or suggestions differ from the set of writings in which it is inserted, although some consensus about Pombal's biography at the time are approached with some similarity.

The next chapter of the book, "O Marquez de Pombal e a civilização brasileira" ["The Marquis of Pombal and the Brazilian civilization"], is signed by professor, literary critic, historian, and famous polemicist Silvio Romero, who would fall out with two of the book's collaborators in the following years: Teófilo Braga and Machado de Assis. As the title indicates, the author seeks to present Pombal as "a powerful factor in the develop-

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<sup>158</sup> Machado de Assis, "A derradeira injuria", in *Marquez de Pombal: Obra Commemorativa do Centenário da Sua Morte Mandada Publicar pelo Club de Regatas Guanabareense do Rio de Janeiro*, Lisbon, Imprensa Nacional, 1885, pp. 21-22.

<sup>159</sup> João Paulo Papassoni, *Op. Cit.*, p. 46.

<sup>160</sup> João Paulo Papassoni, *Op. Cit.*, pp. 26-27



ment of Brazil”, responsible for the “foundation of a people in the new continent” and for preparing the “Brazilian homeland”<sup>161</sup> (translated). Therefore, despite having to fight several fights against the vestiges of the Middle Ages in Portugal, represented by the clergy and the nobility to let the lights of the century enter the kingdom and colonies, the great minister had time to take care especially of Brazil, the richest Portuguese domain, where he obtained more brilliant results than in Europe.

To prove his arguments, Romero states that several Brazilians have held important positions in the State or distinguished themselves in the sciences or Republic of Letters since the time of the Marquis of Pombal. The list of names includes D. Francisco de Lemos (1735-1822), bishop of Coimbra, as well as university rector and reformer; D. Francisco da Assunção (1726-1808), professor of rhetoric and bishop of Olinda; D. José Joaquim de Azeredo Coutinho (1742-1821), bishop of Olinda and later general inquisitor of the kingdom in the reign of D. João VI (1767-1826); José Bonifácio de Andrada (1763-1838), naturalist and statesman from the town of Santos who became the “patriarch of independence”; José Mariano da Conceição Veloso (1742-1811), botanist and professor, author of *Florae Fluminensis* (1825-1831); José Feliciano Fernandes Pinheiro (1774-1847), who translated works applicable to the national industry; José da Silva Lisboa (1756-1835), deputy and secretary of the Inspection of Agriculture and Commerce Board of Bahia; and Hipólito José da Costa (1774-1822), editor of *Correio Braziliense* in London. One can also point out the group of Brazilian Arcadian poets: Cláudio Manuel da Costa (1729-1789); Basílio da Gama; Tomás Antônio Gonzaga (1744-1810); Santa Rita Durão (1722-1784); Inácio José de Alvarenga Peixoto (1744-1793); Silva Alvarenga (1749-1814), among others.

To the author, Pombal had paved the way to the Minas Gerais Conspiracy. To support this claim, he lists some measures of the statesman, properly decontextualizing them for his purposes, that is, to prove the reach of his political-administrative action on the development of Brazil<sup>162</sup>.

The theme of the following chapter of the Pombaline centenary commemorative book is “O Marquez de Pombal e a liberdade dos índios” [“The Marquis of Pombal and the freedom of the Indians”], signed by the lawyer and jurist Tomás Alves Junior and dated December 31, 1881. The text praises the “great minister” for having enacted the law of May 8, 1758, which declared the freedom of all indigenous people in Portuguese domains, as well as all their property – root, livestock, and movable –, farming, and commerce. He also highlights the charter of September 19, 1761, which prohibits the entry of slaves

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<sup>161</sup> Silvío Romero, “O Marquez de Pombal e a civilização brasileira”, in *Marquez de Pombal: Obra Comemorativa do Centenário da Sua Morte Mandada Publicar pelo Club de Regatas Guanabarenses do Rio de Janeiro*, Lisbon, Imprensa Nacional, 1885, pp. 31-32.

<sup>162</sup> *Id.*, *Ibid.*, p. 37.

into Portugal, under penalty of their freedom, and the charter of January 16, 1773, declaring that no one would be born a slave in Portugal anymore. The laudatory tone of the short article by Tomás Alves Junior ends up consecrating the “immortal minister of D. José I” as a “meritorious and benefactor of humanity” (translated)<sup>163</sup>.

This tone remains in two other chapters, namely: “Il Marchese di Pombal”, a long article written in Italian with excerpts from a French correspondence that occupies almost five pages, signed by Count Angelo de Gubernatis and dated December 26, 1881; and the text by the German historian George Weber (1808-1888) entitled “Der Minister Pombal – EinLebexs – Und charakterbildaus der zeit der aufklaerung”.

The chapter that follows is a 50-page essay signed by Emidio Garcia, written in Coimbra in April 1882 and entitled “Marquez de Pombal: Introducção, definições e esclarecimentos” [“Marquis of Pombal: Introduction, definitions, and clarifications”]. The essay is divided into four chapters: “Historical Background”; “The Marquis of Pombal and his time”; “The Marquis of Pombal and the main acts of his government”; “The Marquis of Pombal and its influence, consequences, and conclusion”. Here, the author seeks to show the reader that, if Pombal’s actions were not immediately felt, they stand out when we compare the historical antecedents and consequences. He also criticizes the theological mysticism of some historians and the poetic and sentimental naturalism of others.

The following chapter of the book is signed by another famous Portuguese intellectual: Oliveira Martins, who writes about “The Pombaline legislation”. Given the moment when the fantasies of Romanticism, dominant since the first half of the 19<sup>th</sup> century, were already dissipating, the author considered that one should do justice to the man who was a disciple of Descartes (1596-1650) and Newton (1643-1727). Despite being seen by his opponents as antichrist and sworn enemy of the nobility and the Jesuits, Pombal spread the seed of radical liberal doctrines and utilitarian principles in his country, like other statesmen in the end of the 19<sup>th</sup> century. Consequently, the time had come for his apotheosis, when the “naturalist principles” reacted against the subjective thinking of Romanticism.

In “O Marquez de Pombal e a Companhia de Jesus” [“The Marquis of Pombal and the Society of Jesus”], a long essay divided into four parts and signed by Júlio de Matos, the author seeks to explain and justify the “dictatorial act of September 3, 1759”. According to him, this legislative piece was the prelude to the rupture of relations with the Roman curia, for the “Portuguese people”, he states in the first paragraph, “when thinking of the imperative and prominent figure of the revolutionary statesman now, sees in him neither

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<sup>163</sup> Alves Junior, “O Marquez de Pombal e a liberdade dos indios”, in *Marquez de Pombal: Obra Comemorativa do Centenário da Sua Morte Mandada Publicar pelo Club de Regatas Guanabareense do Rio de Janeiro*, Lisbon, Imprensa Nacional, 1885, p. 47.

the diplomat, nor the economist, nor the reforming minister of national instruction, but the enemy of the Society, the relentless persecutor of the Jesuits” (translated)<sup>164</sup>.

The last chapter, entitled “O Marquez de Pombal e a restauração da litteratura portuguesa” [“The Marquis of Pombal and the restoration of Portuguese literature”], is signed by Teófilo Braga, who begins his text by talking about civil equality and political freedom, themes developed in the century of the encyclopedists by literati and philosophers such as Voltaire, Rousseau, Montesquieu, Diderot, Condorcet, and Turgot. Next, he explains the reason for Portugal’s delay in this regard, in a tradition that not even the Marquis of Pombal was able to break, for he did not allow any kind of political freedom in his government.

In the end, the author paints a discrediting picture of the situation of the literature from the Pombaline period, because it only reproduced conventional examples in its lyrical, epic, and dramatic forms through imitation. Ergo, despite Pombal’s important initiatives, he could not satisfactorily stimulate the development of literature because he killed the feeling of political freedom, sanctioning monstrous acts in the name of an exaggerated regalism. Only with Garrett in the 19<sup>th</sup> century, according to the author, Romanticism was able to bring the enthusiasm for new literary forms in the service of political freedom to Portugal.

## SOME CONSIDERATIONS

Celebrated or execrated, the figure of the Marquis of Pombal is never forgotten or treated with indifference by the Portuguese and Brazilian historiography of the period that sometimes bears his name and which coincides with the reign of D. José I (1750-1777). In this context, his historical representation as a hero or as a villain was never contested, either as a protagonist in the political life of the second half of the long Portuguese 18<sup>th</sup> century or as a precursor of ideas and practices simultaneously enlightened and obscurantist. This finding makes it difficult to disallow the assertion that Pombaline governance, for better or worse, represented a turning point in the destinies of all those affected by it, because it irreversibly altered the legal, social, and cultural structure of the metropolis and its colonies, despite not achieving all of its immediate objectives.

Upon reaching international fame during his lifetime and becoming the political figure about whom most has been written inside and outside his native country, his national importance was enshrined in 1934, when a monumental statue was built in his honor in the center of Lisbon. Still today, Pombal is the object of polemics and controversies in universities and bar tables, in which, throughout history, two currents compete for primacy:

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<sup>164</sup> Júlio de Matos, “O Marquez de Pombal e a Companhia de Jesus”, in *Marquez de Pombal: Obra Comemorativa do Centenário da Sua Morte Mandada Publicar pelo Club de Regatas Guanabareense do Rio de Janeiro*, Lisbon, Imprensa Nacional, 1885, pp. 175-176.

one antipombaline, for the cruelty of its punishments, which did not spare the nobles, the clergy, nor the people; and another philopombaline, for its innovative economic and educational measures. These movements configured and solidified the mythology of the Marquis of Pombal in the Portuguese culture.

This text presented one of the effects of this bipolarity in the representations of the Marquis of Pombal: philopombalism. It began in the field of literary history as early as 1826 and was consolidated in 1882, the year of the commemorations referring to the centenary of his death. In the Brazilian case, as previously discussed, some authors tried to neutralize their judgments or to shade the opinions by employing an ambiguous tone in their texts, which are transformed from praise into criticism. Yet, they generally allow themselves to be affected by the partial views motivated by the passions that overvalued the meaning of his actions and end up taking sides in the Pombaline polemic, either intentionally or unconsciously.

The reasons for his exaltation refer to his economic, cultural, and social reforms, with legislation that modified public instruction and inaugurated a new era of tolerance and integration, such as the abolition of anti-Semitic prejudice against “new Christians”, the prohibition of slavery in the metropolis, the freedom of Indians in Brazil, and the promotion of mixed marriages in overseas territories, including India, as well as the closure of prosecution processes against emerging masonic lodges.

Such arguments were opposed to the contrary ones, which held that his governing practice was associated with exile, torture, and domination, through military force, of population groups that spoke out against his reforms. It is enough to mention, to activate our historical memory, the expulsion and imprisonment of the Jesuits, the condemnation of hundreds of people by the Inquisition led by his brother, Paulo de Carvalho (1702-1770), the torture and murder of the Távora family, the repression of the fishing village of Trafaria, and the crushing of the revolt of the Port wine merchants.

As António Lopes<sup>165</sup> observed, all the works printed during Pombal’s lifetime are favorable to him, with the exception of two: *O Juízo da Verdadeira Causa do Terramoto* [An Opinion on the True Cause of the Earthquake] (1756), by the Italian Jesuit Gabriel Malagrida (1689-1761), and the Pastoral of D. Frei Miguel da Anunciação (1703-1779) of November 8, 1768, in which he condemned some works tainted with regalism and which cost him more than eight years in Pedrouços prison. This evidence shows that D. José’s minister created a positive image of his undertakings since the beginning of his administration through a powerful propaganda scheme encompassing symbolic paintings, medals, panegyrics, sonnets, and plays in his honor<sup>166</sup>. Moreover, he exercised absolute control over

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<sup>165</sup> António Lopes, *Enigma Pombal*, 2<sup>nd</sup> ed., Lisbon, Roma Editora, 2002.

<sup>166</sup> Ivan Teixeira, *Mecenato Pombalino e Poesia Neoclássica: Basílio da Gama e a Poética do Encômio*, São Paulo, Editora da Universidade de São Paulo, 1999, p. 28.

his biography, purging every piece of writing that criticized or discredited his government or his person from the publishing market. Nonetheless, if his supporters and sycophants glorified him during his government, few were those who stayed by his side with the death of D. José and his fall from the government during the so-called *viradeira*. In fact, during the reign of D. Maria I (1734-1816), hundreds of satirical poems, accusations, and attacks on the former minister were published, and the medallion with his effigy in the equestrian statue of D. José I was removed.

As discussed, all the philopombaline elements are present in the texts dedicated and addressed to the Brazilian reading public: the condemnation of both D. João V's reign and the idle nobility he sustained; the demonization of the Jesuits and of the English ambition; the anachronistic defense of the secular state, liberalism, and even democracy, something difficult to combine with the enlightened despotism and regalism of the Pombaline government etc. The more obscure or lesser-known phases, such as his youth and his diplomatic experience in London and Vienna, are left to imagination. His cruelties, in turn, are overlooked and seen as part of the custom of the time.

# MARQUIS OF POMBAL – LIFE, ACHIEVEMENTS, AND PERCEPTIONS: A GIUSEPPE BARETTI’S EVALUATION

JOSÉ EDUARDO FRANCO<sup>167</sup>

*My investigations here were not limited merely to usages and customs, to palaces and convents. I have done my best to gather genuine information about the various events which have lately turned the eyes of all Europe to this country, and you would admire my zeal if I informed you of all my efforts to discover the true motive of the crime of the Duke of Aveiro, of the expulsion of the Jesuits, of the exile of the king’s natural brothers, of the rude and unprecedented treatment inflicted on Cardinal Acciaiuoli, and of the elevation of Dom Sebastião José de Carvalho to the supreme prestige of power. These matters are certainly difficult to report, because careful precautions have been taken to throw a veil over them that will hinder future historians<sup>168</sup>.*

*The Marquis of Pombal dies. But his memory will never die. There is no power on earth that can erase the memory of a virtuous man; the corruption of the times and the caprice of fortune are far below true merit. This is the judgment that, through the mouth of independence, utters the truth forever: The Marquis of Pombal, the great Man will be precious to Religion in all centuries: his actions will be the example of Justice and Patriotism, and his Grave will not be able to give another epitaph more penetrating nor more energetic than his NAME<sup>169</sup>.*

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<sup>167</sup> Open University, Portugal.

<sup>168</sup> Translated: “As minhas investigações aqui não se limitaram meramente aos usos e costumes, aos palácios e conventos. Fiz os possíveis por reunir informações genuínas sobre os vários acontecimentos que, ultimamente, fizeram virar os olhos de toda a Europa para este país, e vocês admirariam o meu zelo se vos informasse de todos os meus esforços para descobrir o verdadeiro motivo do crime do duque de Aveiro, da expulsão dos Jesuítas, do desterro dos irmãos naturais do rei, do tratamento rude e sem precedentes infligido ao cardeal Acciaiuoli, e da elevação de Dom Sebastião José de Carvalho ao sumo fastígio do poder. Estes assuntos são certamente de difícil informação, porque foram tomadas cuidadosas precauções para lançar sobre eles um véu que estorvará futuros historiadores” (Giuseppe Baretti, “Cartas de Portugal”, translation, preface and notes by Maria Eugénia Ponce de Leão, Sep. *Revista da Universidade de Coimbra*, vol. XX, 1970.

<sup>169</sup> Translated: “O Marquês de Pombal morre. Mas não morrerá jamais a sua memória. Não há poder sobre a terra que faça riscar a lembrança do homem virtuoso; a corrupção dos tempos e o capricho da fortuna estão muito abaixo do verdadeiro merecimento. Este é o juízo que pela boca da independência profere para sempre a verdade: Precioso à Religião será em todos os séculos o Marquês de Pombal, o Homem grande: as suas ações serão o exemplo da Justiça e do Patriotismo, e a sua Sepultura não poderá

*It [Democracy] has an idea, a symbolism that it called the Marquis of Pombal, adulterating him to the fabulous conditions of the myth. Now I write of a man whom I call a despot [...]. I sketched the biography of a fierce man and did not forget to point out the greatest number of accessories and contingencies that made him so cruel. If he could be better and do more than he did, the critic can say so<sup>170</sup>.*

*Pombalists, antipombalists, just tell us who Pombal was<sup>171</sup>.*

## INTROIT

If there is a figure in Portuguese history that is strongly marked by successive readings and representations of his personality and political action, it is, par excellence, the Marquis of Pombal. He was undoubtedly the object of an unprecedented process of mythification in Portugal and internationally. Hence, a difficulty arises: to carry out a balanced assessment of the modes and impacts of his work and his legacy. It is never enough to break through the image constructions of the two currents of interpretation – philopombaline and antipombaline, which have asserted themselves in counterpoint over the last 300 years –, seeking to revisit the primary sources that have shaped the interpretations of the role of this historical actor, especially those of on-site observers<sup>172</sup>.

It is well known that the broadcasted image of the Marquis of Pombal is not exactly that of a tolerant and compassionate politician. On the contrary! From the point of view of his political practice, our stereotyped imagination is occupied with the remarkable stories of expulsion, torture and crushing, through military force, of protests by population groups dissatisfied with the Pombaline political and economic reforms. Some examples that were well engraved, with blood letters, on the pages of the history of that time are to be remembered: the expulsion and imprisonment of hundreds of Jesuits; the sentence of faith that burns the Jesuit Malagrida and tortures more than half a hundred people condemned by the Inquisition, led by his brother Paulo de Carvalho; the spectacular condemnation

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dar outro epitáfio mais penetrante nem mais enérgico que o seu NOME” (Frei Joaquim de Santa Clara, *Oração Fúnebre*, Lisbon, Imprensa Nacional, 1850).

<sup>170</sup> Translated: “Ela [a Democracia] tem uma ideia, um simbolismo a que chamou *Marquês de Pombal*, adulterando-o até às condições fabulosas do mito. Ora eu escrevo de um homem a quem chamo *déspota* [...]. Bosquejei a biografia de um homem feroz e não me esqueci de assinalar o maior número de acessórios e contingências que o fizeram tão cruel. Se ele podia ser melhor e fazer mais do que fez, diga-o a crítica” (Camilo Castelo Branco, *Perfil do Marquês de Pombal*, Lisbon, Prefácio Editora, 2003).

<sup>171</sup> Translated: “Pombalistas, antipombalistas, digam-nos tão somente quem foi Pombal” (Marc Bloch *apud* Joel Serrão, “Repensar Pombal”, in Maria Helena Carvalho dos Santos (coord.), *Pombal Revisitado*, vol. I, Lisbon, Presença, 1984).

<sup>172</sup> Cf. José Eduardo Franco and Annabela Rita, *O Mito do Marquês de Pombal: A Mitificação do Primeiro-Ministro de D. José I pela Maçonaria*, Lisbon, Prefácio, 2004.

and torture of members of the Távora family; the repression of the fishing village of Trafaria; and the crushing of the Port wine merchants' revolt by the King's troops<sup>173</sup>.

However, if for certain groups, families, and institutions Sebastião de Carvalho e Melo, all-powerful Secretary of State to King José I, was implacable, for others he created and published legislation that inaugurated a long desired new era of tolerance and integration. There are the cases of the pioneering legislation banning slavery in the metropolis, freeing indigenous peoples in Brazil, promoting mixed marriages in overseas territories (namely in India), and filing accusations against the emerging masonic lodges. However, most relevant, in our view, due to its lasting effects, was the progressive preparation and publication of legislation aimed at solving an ignoble problem of social discrimination that had existed for two centuries, putting an end to the distinction between Old Christians and New Christians. This divide had created a social state of negative differentiation in relation to the descendants of Jews and Moors converted to Christianity. In the language of our times, for more than 200 years, both in Portugal and in Spain, the ignominious existence of first-class and second-class citizens in a Christian society prevailed<sup>174</sup>. One hundred years before, Father António Vieira, voicing a critical current of this discriminatory social state, had officially asked King D. João IV to reform the Inquisition and to put an end to this shameful distinction between Christians confirmed by the same water of baptism<sup>175</sup>. Indeed, Pombal granted what we can euphemistically call "pardon the Jews", seeking to end centuries of stigmatization of Jewish and Islamic religious minorities in a Christian society. He certainly did so as a political strategy, but also in the light of Enlightenment values, based on the ideal of universality and attention to the diversity of the human race in its different expressions.

Nonetheless, if this principle worked and was applied to some groups, it worked in *contrario sensu* with others during the 27 years of the Pombaline consulate. That is why Kenneth Maxwell classified Pombal, with appropriate rigor of analysis, as an authentic "paradox of the Enlightenment"<sup>176</sup>, which made him, in our view, an Achilles' heel of critical historiography. In a way, the Marquis of Pombal remains a kind of historiographical enigma, which requires study and deepening into his multiple facets to be better understood; nonetheless, it is also framed in a complex scenario, in part caused by his political undertakings, without forgetting that the context itself, or the spiral of contexts, con-

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<sup>173</sup> Cf. Padre Manuel Antunes, "O Marquês de Pombal e os Jesuítas", in Padre Manuel Antunes, SJ, *Obras Completas. Religião, Teologia e Espiritualidade*, t. IV, Lisbon, Fundação Calouste Gulbenkian, 2007, p. 232.

<sup>174</sup> Cf. Paulo Mendes, *O Marquês de Pombal e o Perdão aos Judeus*, Lisbon, Theya, 2017.

<sup>175</sup> Cf. José Eduardo Franco, "Padre António Vieira, precursor do Marquês de Pombal. O Marquês de Pombal, detrator do Padre António Vieira", in Maria do Rosário Monteiro and Maria do Rosário Pimentel (orgs.), *Padre António Vieira. O Tempo e os Seus Hemisférios: Actas do Congresso Internacional*, Lisbon, Colibri, 2010, pp. 377-397.

<sup>176</sup> Kenneth Maxwell, *Marquês de Pombal. O Paradoxo do Iluminismo*, Lisbon, Presença, 2001.



ditioned his action. Pombal, was a kind of determined prime minister and determiner of an absolutist and centralist King who delegated much of his executive power to him. Consequently, he ended up - in his statist theory and political practice, repressive of all oppositions and critics – for taking extraordinarily innovative measures, which made him, in some respects, a precursor of contemporaneity. This paradoxical contradiction is not, however, exclusive to the Pombaline case, given that it is a characteristic common to outstanding absolutist rulers of the Enlightenment century in nations considered very progressive in Europe. In Portuguese history, the case of Pombal is, nonetheless, a unique case, which still requires a lot of study and critical knowledge to be understood in its meaning and complexity.

### A LIFE DETERMINED BY A GREAT AMBITION<sup>177</sup>

The May 13 is known to everyone for the apparitions of Fátima in 1917. However, few are aware that one of the most famous politicians in the history of Portugal and Europe, the Marquis of Pombal, was born on May 13, 1699 and was baptized with the name of Sebastião José de Carvalho e Melo. His death took place on the 8<sup>th</sup> of the same month of May in the year 1782<sup>178</sup>.

He is the politician of modern Portuguese history about whom most has been written in Portugal and abroad. His life was full and worthy of all kinds of novels: melodrama, romance, detective, war, adventure, among others. In fact, his life path had some very interesting ingredients to inspire good films. For instance, we can remember that Sebastião José, when he married for the first time a noblewoman much older than himself, had to kidnap his beloved, because the family had forbidden the marriage. His second marriage, after the death of his first wife, was calmer and more diplomatic, with a daughter of the high Austrian nobility, during his presence in Vienna as ambassador of Portugal.

In general, Sebastião José comes to our memory with his noble titles of Count of Oeiras (1759) and Marquis of Pombal (1770), which he received from King D. José. The great Marquis was known for having asserted himself as prime minister in the modern sense, having replaced the King in coordinating the government of the Portuguese state, absolutely reinforcing centralized monarchical power. For this reason, his time and gov-

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<sup>177</sup> Part of this article retrieves, adapts, and re-perspectives research and analysis already published by the author. Cf. Jacinto Jardim and José Eduardo Franco (coords.), *Portugal Empreendedor: Trinta Figuras Empreendedoras da Cultura Portuguesa. A Relevância dos Modelos para a Promoção do Empreendedorismo*, Lisbon, Imprensa Nacional-Casa da Moeda, 2013.

<sup>178</sup> Among the various biographies that have come to light about Pombal, we can highlight: Joaquim Veríssimo Serrão, *O Marquês de Pombal. O Homem, o Diplomata e o Estadista*, 2<sup>nd</sup> ed., Lisbon, Academia Portuguesa da História, 1987, and Pedro Sena-Lino, *De quase nada a quase Rei. Biografia de Sebastião José de Carvalho e Melo, Marquês de Pombal*, Lisbon, Contraponto, 2020.

ernment became known for his signature: rather than Josephine, Pombaline time and government, contrary to the usual practice of designating (with the name of the King) the period corresponding to a given reign.

It is no exaggeration to say that, from a political point of view, the Marquis of Pombal was a precursor of measures that made a fortune in contemporary times. He found a country in need of urgent reforms that would allow it to catch the European train of progress, or rather, of the kind of progress Enlightenment philosophy advocated. Considering this scenario, this diplomat of low nobility - who would become, against tradition, a prominent minister of the Portuguese monarch's governing team - knew how to take advantage of his position and the opportunities to affirm his ideas and implement them with vigor.

## CONTRASTING PATHS AND PERCEPTIONS

It is true that the Marquis of Pombal became famous in the political history of Portugal, for good and bad reasons, as was the hallmark of the great reformist politicians of the so-called enlightened despotism. Indeed, the name of the Marquis is remembered both for the energetic action in the enlightened reconstruction of Lisbon after the tragic earthquake of 1755 and for the expulsion of the Jesuits in 1759, from our country and the colonies; as well as for social, economic, and industrial reforms - having ended the discriminatory distinction between New and Old Christians -; and, finally, for the Trafaria massacres and the military crushing of the rebellion of undefeated city against the creation of the wine company of Porto and the first demarcated region for wine exploration in our country and in the world<sup>179</sup>.

He developed a policy marked by modernity and contradiction, not much different from the practice of his contemporary absolutist ministers, which became famous for this statist and repressive way of exercising power, as the famous case of Richelieu, in France. However, the contradictions of his life and political action are accentuated in our contemporary eyes, which tend to appreciate him according to the current of reading from which one drinks: commonly with the idea that this politician would have been untimely, opportunistic, cruel, self-interested, solipsistic, possessive, irreligious or anti-Catholic, or that he would have been a Prometheus who opened the doors of modernity and progress to Portugal, bringing it closer to the more advanced European countries to take it out of the backwardness situation (or that of tail of Europe) in which it was<sup>180</sup>.

## VISIONARY POLITICIAN WITH A SELECT TEAM OF ADVISERS

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<sup>179</sup> Cf. *Como Interpretar Pombal?*, Lisbon, Brotéria, 1983.

<sup>180</sup> Cf. Maria Helena Carvalho dos Santos (coord.), *Pombal Revisitado*, vol. 1, Lisbon, Presença, 1984.

One of the conditions that makes a great entrepreneur is to have a project, a dream, and a well-defined idea for the company a person wants to succeed. In the case of the Marquis of Pombal – inspired by the dictates of the political philosophy of the Enlightenment for the construction of a strong, well-organized, and respected State, which had the Austrian and French States as models, and following some good examples of the British monarchy on the rise –, his big dream was to reaffirm Portugal in Europe and in the world as a power with something to say<sup>181</sup>. He had clear ideas about what he wanted for his country, which he knew how to develop and improve with his European international experience and with the advice of influential thinkers of the time, such as D. Luís da Cunha, Luís António Verney, Nunes Ribeiro Sanches, Friar Manuel of the Cenacle, among others. In fact, not only did he choose the models he considered more progressive, but he also knew how to surround himself with advisers and assessors considered very competent at the time. Curiously, contrary to what one might think, most of the prominent advisors were formed and affiliated in the ecclesiastical environment. Among them, it is worth mentioning brilliant intellectuals and creatives of the time, such as Father António Pereira de Figueiredo, of the Order of the Oratory, Friar Manuel do Cenáculo, of the Order of São Francisco – not to mention foreigners, such as the secularized Capuchin Abbot Platel (baptized as Pierre Parisot) –, the Dominican friar João de Mansilha and, in the legal environment, a figure like José de Seabra da Silva. He also knew how to call leaders and specialists from abroad to coordinate the qualification of strategic areas for the country, as was the case with the Army, which needed to be prepared and modernized. For this purpose, he hired the services of the Count of Lippe, who reorganized and formed the Portuguese army in more advanced ways. We can also recall the hiring of foreign teachers for the College of the Nobles, in order to guarantee modern teaching, open to the new trends and methodologies of European teaching. Indeed, Pombal knew how to strategically surround himself with the best, recruited from the various sectors and institutions of society at the time, both in the Church and in the influential elites in the fields of culture, education, engineering, and military science<sup>182</sup>.

## PERSISTENCE AND BOLDNESS

It is important to know the journey of Sebastião José in order to understand, in some way, why this man became the key person; the man of the hour who took the reins of power in the kingdom of Portugal in a period marked by events of complex management.

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<sup>181</sup> Cf. José Vicente Serrão, “Sistema político e funcionamento institucional no pombalismo”, in Fernando Marques da Costa *et al.* (org.), *Do Antigo Regime ao Liberalismo*, Lisbon, Vega, 1989, pp. 11-21.

<sup>182</sup> Cf. Laerte Ramos de Carvalho, *As Reformas Pombalinas da Instrução Pública*, São Paulo, Saraiva/Editora da Universidade de São Paulo, 1978.

He was born in Soure, near Pombal, in a family of the lower nobility of the province. From an early age, he aspired to fly further and achieve a prominent position at the Lisbon court. Little is known about his formative path. It is vaguely stated that he would have attended the banks of the University of Coimbra, although there is no record of his enrollment. What is certain is that, in his youth as a somewhat adventurous small nobleman, his ambitious and daring profile appears, allowing him to gain experience through the process of trial and error, which would later come to be useful to him.

Sebastião José wanted to and married a daughter of the high nobility, to which he was denied access because the father of his beloved was jealous of his prerogatives and did not want his daughter to marry a nobleman of inferior status. To do so, he had to kidnap his beloved, the daughter of the Count of Arcos, 10 years his senior, which resulted in a conflict that was never resolved until the end of his wife's life.

From an early time, he sought to be favored with royal appointments for positions that would give him some material security and social advancement, with attention to the attempt to be nominated for the Finance Council. However, the path to succeed in the capital of the metropolis was facilitated, at a young age, by material and prestigious capital that he obtained by inheriting the estate and goods from his uncle Paulo de Carvalho.

## **INTERNATIONAL EXPERIENCE AND STRONG SOCIAL NETWORKS**

Better equipped with means and influences at court, he managed to fulfill one of his first great dreams, which provided him with an international diplomatic career that allowed him to gain experience in the European countries where he passed and settled. The doors of two very important European capitals were opened to him for diplomatic activity at the service of the Portuguese court. He was sent as a plenipotentiary minister to London in 1739, having then been posted, in 1743, to the imperial court of Vienna, Austria, as an extraordinary envoy, where he remained until 1749. In London, he got to know the political heart and of the entrepreneur and emerging English empire. In the Austrian capital, he learned about the political currents in vogue and the vigorous practices of the political ideology of enlightened absolutism and created new. He also built important social networks, marrying, after the death of his first wife, a young woman from the high nobility of Vienna, the daughter of the famous General Daun.

Returning to Portugal, in the context of the illness and death of the monarch D. João V, and having already, for some time, established friendship links with influential figures in the Portuguese court, namely with the Jesuit advisers and confessors of the royal family, Sebastião José found the unique opportunity to ascend to a coveted prominent place in the government of the kingdom. With the rise of D. José I to power in 1750, the little nobleman Sebastião José de Carvalho e Melo achieved, in an unprecedented way consid-

ering his social origins from the lower nobility, a place in the governing team of the three secretaries of State of the new Portuguese King. He began by taking over the Foreign Affairs and War chair, until later he reached the position of Secretary of State for the Kingdom, equivalent to that of Prime Minister, in the modern sense of the position<sup>183</sup>.

## STRONG LEADERSHIP AND COURAGE TO REFORM

Indeed, his political ideas, his international experience, and his plans of reforming the country in light of the so-called enlightened despotism were manifested in the extraordinary reformist entrepreneurship he demonstrated during his 27 years of governance. The most emblematic political work, which stands out prominently in the historical memory of this politician and is also the best known nationally and internationally, is the reconstruction of Lisbon, following the tragic earthquake of 1755 that devastated the Portuguese capital. After this catastrophe, which claimed tens of thousands of human lives, the Secretary of State Carvalho e Melo revealed himself to the King as the man of the hour, energetic and decisive, with a plan of action to rehabilitate a city ruined by fire, by the devastation of a powerful tidal wave that hit the riverside houses, by the disease and the social disorder. The immediate slogan is attributed to him, in the form of a plan of action, before the desolation and disorientation of the court and its governing team: "It is necessary to bury the dead and take care of the living". In fact, after the earthquake, the King began to place increasing trust and responsibility in his minister, who became the key figure in his government. His leadership was decisive for the reconstruction of a capital with a new face, designed according to enlightened architectural parameters geometrized.

However, the mark the Marquis of Pombal left went far beyond the reconstruction of Lisbon. Pombal undertook a remarkable set of reforms in the most varied sectors of the country and the overseas empire. A look at the dimension of the several volumes of legislation of the reign of King José I, prepared, fundamentally, by this hardworking minister indicates that this was the reign of Portuguese history that, until then, had more laws and reforms in the name of an ideology of affirmation of a modern, powerful, and centralized State. The Marquis of Pombal carried out reforms that ranged from the modernization of State structures (customs reforms, territorial reorganization, colonial administration, fiscal and financial administration of the royal treasury, the Police, the Army, social regulation...), to economic and religious reforms<sup>184</sup>.

He created monopoly companies based on the English and Dutch models to boost economic sectors considered strategic, such as trade with Brazil and the Orient. Additionally,

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<sup>183</sup> Cf. Francisco J. C. Falcon, *A Época Pombalina*, 2<sup>nd</sup> ed., São Paulo, Ática, 1993.

<sup>184</sup> Cf. Jorge Borges de Macedo, "Dialéctica da sociedade portuguesa no tempo de Pombal", *Sep. of Brotéria*, vol. 115, n. 6, December 1982, pp. 451-459.

it is worth noting the potentiation of industrial activity, which included the creation of factories glassworks in Marinha Grande and the establishment of the first demarcated wine region in the world for the production of Port wine, with the foundation of the monopoly company of Port wine in 1757.

On the social front, the reform of the Inquisition and the elimination of the fractured distinction between New Christians and Old Christians, which transversally divided the Portuguese society, stand out. At the same time, he was also a pioneer in the prohibition of slavery in the Portuguese metropolis, maintaining it, however, in colonial territories.

In the field of education, he carried out important reforms in teaching and at the University of Coimbra, in line with modern ways and with the most advanced European parameters of new science to stimulate scientific research. The novelty and courage of this university reform, which had been preceded by the reform and nationalization of pre-university education, was marked by the controversial and debatable measure of expulsion of an important intellectual, pedagogical, and scientific elite: the Jesuits. It was precisely following the expulsion of the Society of Jesus, in 1759, that the minister of D. José I promoted, in the 60's, the creation of the College of the Nobles to form a qualified elite in Portugal. In this context of Pombaline educational reforms, it is also worth mentioning the foundation of the Board of Literary Providence to supervise and enhance education and the promotion of the general reform and updating of school textbooks, accompanied by the structuring and nationalization of the teaching career. The Pombaline reform of education is, therefore, a pioneer at European level in the first general nationalization of education<sup>185</sup>.

Some consider, perhaps with some reason, that the linguistic reform the Marquis of Pombal carried out in Brazil – running in parallel with the administrative reform of that gigantic Portuguese colony –, which made the teaching of the Portuguese language compulsory and prohibited indigenous languages, was largely responsible for the national unity of Brazil. In fact, today this country speaks Portuguese throughout its territory, having this linguistic unit as its main factor of national cohesion.

Although little known, the reform of the administrative reorganization of the so-called kingdom of the Algarves was also important. It ended the age-old customs fees between the kingdoms of Portugal and the Algarves, in addition to helping to put an end to this historic separation evident in the titles of Portuguese monarchs, in an almost colonial tone. These measures contributed for the aforementioned kingdom of the Algarves to be incorporated and named by right as an integral part of the Portuguese metropolis.

## FAITHFULNESS TO CONVICTIONS

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<sup>185</sup> Cf. Luiz Eduardo Oliveira, *Gramatização e Escolarização: Contribuições para Uma História do Ensino das Línguas no Brasil (1757-1827)*, São Cristóvão, Editora UFS/Fundação Oviêdo Teixeira, 2010.

Contrary to what one might think, the prime minister of D. José I was a politician proud to belong to the lineage of great Portuguese men faithful to the values of their homeland and their religion. In this regard, there were some institutional connections that might surprise us, as they are little or not known to us at all. The Marquis of Pombal was a member of the Third Order of Saint Francis, therefore being a third Franciscan; he had the status of family member of the Inquisition, an institution that would end up being reformed in the statist sense by his hand in 1774; he was a sponsor of the erection of several churches and chapels and made several donations to the Church; and he committed himself to the reform of religious orders, with the declared aim of making them more faithful to their founding charism.

Before dying, and after having fallen from power in 1777, with the death of his protector, King D. José I, whom he faithfully served until the end, he wrote several apologies to oppose those who wanted him judged for the excesses and faults committed during the exercise of absolute ministerial power. What the Marquis of Pombal most regretted in the list of accusations he was targeted was the criticism of having been an irreligious and anti-Catholic minister. He defended himself by claiming he was faithful to Catholicism throughout his life. He explained some of his measures that shook the Church with the justification of the need for reform and moderation of ecclesiastical privileges.

## GIUSEPPE BARETTI'S PERCEPTIONS AND APPRAISALS

There are many written sources (and some iconographic ones) about the Marquis of Pombal and his time, in which the most diverse perceptions, appreciations, evaluations, and valuations are evidence of the remarkable political action of this figure. Pombal left a unique trace in the history of European enlightened absolutism. Ambassadorial reports, poetry, lampoons, treaties, relationships, stories, correspondence, travel literature, political speeches, apologies, biographies, court sentences, novels, epitaphs, and others constitute the countless documentation that contributed to sediment the memory of Pombal and the judgments he was subjected to, which ended up crystallizing very contrasting images of this great Portuguese politician. Among the documentary forest produced on Pombal, the travel literature (not infrequently written in an epistolographic genre) of foreign travelers who visited Portugal and observed *in loco* the physical and human landscape of a country of a time marked by events that shook Europe and somehow changed part of its history<sup>186</sup>.

Giuseppe Marco António Baretto (1719-1789), literary critic, poet, polemicist, journalist, and dictionary author, who also used the pseudonym Aristarco Scannabue, was

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<sup>186</sup> Cf. Christine Vogel, *Guerra aos Jesuítas: A Propaganda Antijesuítica do Marquês de Pombal em Portugal e na Europa*, Lisbon, Temas e Debates/Círculo de Leitores, 2017.

one of the talented and sagacious travel writers who visited Portugal in the early 60s of the 18<sup>th</sup> century, having written about this visit to the Portuguese metropolis. He arrived in Lisbon in August 1760, being able to observe the effects of two tremendous events in the Portuguese capital that weakened Portugal and shook Europe in the Enlightenment century<sup>187</sup>. The first one was the famous natural disaster of November 1, 1755: the earthquake, followed by the tidal wave, which destroyed Lisbon and which gave rise to various scientific and philosophical reflections among the Enlightenment intellectuals of the time, including the famous Voltaire. The next one – a kind of second earthquake to some, but religious, educational, and cultural – was the expulsion of the Jesuits<sup>188</sup> on September 3, 1759, following the attack on the monarch D. José I, which took place the previous year. They were morally implicated, in coalition with members of the aristocratic family of the Távoras, who were condemned and tortured as the material authors of the attempt to assassinate the King of Portugal. This trial, carried out in a spectacular public session using torture and cruel punishments in front of everyone, is commented on by Baretto, who sees more shadows than lights and many aspects to be explained in the sentence from the State court. This Italian traveler concluded, from the attempts he made to ascertain the authenticity of the facts, that posterity would have difficulty in ascertaining the historical truth about what really happened with regard to the serious events of recent times in Portugal: “My investigations here they were not limited merely to usages and customs, to palaces and convents. I have done my best to gather genuine information about the various events which have lately turned the eyes of all Europe to this country, and you would admire my zeal if I informed you of all my efforts to discover the true mo-

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<sup>187</sup> About this trip, he made a first publication for Italian readers, which he later translated, with significant adaptations, for another edition, into English: Giuseppe Baretto, *Lettere Familiari a' Suoi tre Fratelli Filippo, Giovanni e Amedeo*, Milano, Malatesta, 1762, and Giuseppe Baretto, *A Journey from London to Genoa through England, Portugal, Spain and France*, London, Davies, 1770.

<sup>188</sup> The law to expel the Jesuits was issued on September 3, 1759, the symbolic date of the first anniversary of the attempt on the King. In this document, signed by the King and the Count of Oeiras, the monarch, in the first person, accuses the Jesuits of qualified rebellion and declares them “denaturalized, proscribed, and exterminated from the entire territory of Portugal and its domains”, after having “heard the opinions of many learned, religious ministers full of zeal for the honor of God”. Presenting this legal instrument as the result of a thoughtful and well-advised resolution, with the endorsing opinion of the most respected figures of the kingdom, the King declares that the Jesuits were considered unworthy of his trust, as they were evaluated as irremediably corrupted, “deplorably alienated from their holy institute and manifestly unwilling with so many, so abominable, so inveterate, and so incorrigible vices to return to their obedience, which have been and are at present, against my real person and States, against the public peace of kingdoms and domains, and against the common good of my faithful vassals”. The accusations, considered proved, could not be depicted more gravely. Cf. José Eduardo Franco, *O Mito dos Jesuítas em Portugal, no Brasil e no Oriente (Séculos XVI a XX)*, vol. 1, preface of Bernard Vincent, Lisbon, Gradiva, 2006, pp. 453 and ss., and Pierre-Antoine Fabre and Catherine Maire (dir.), *Les Antijésuites: Discours, Figures et Lieux de l'Antijésuitisme à l'Époque Moderne*, Rennes, Presses Universitaires de Rennes, 2010.



tive of the crime of the Duke of Aveiro, the expulsion of the Jesuits, the exile of the King's natural brothers, the rude and unprecedented treatment inflicted on Cardinal Acciaiuoli, and the elevation of Dom Sebastião José de Carvalho to the supreme prestige of power. These matters are certainly difficult to report, because careful precautions have been taken to throw a veil over them that will hinder future historians. Therefore, my diligence in investigating was not greatly rewarded. The government has banned everyone from making these and other current affairs the topics of their conversations: the ban exposes offenders to such severe penalties, and so many have already been thrown into prison for this" (translated)<sup>189</sup>.

These events, which changed the course of Portuguese history and established Sebastião José de Carvalho e Melo as the leader of D. José I's governing team, were the subject of the most contrasting interpretations and were still very fresh when Baretto passed through the country, in August and September 1760, not being able to remain indifferent. The classical and religious training of this Italian traveler, who had studied at the seminary – but who, in the meantime, had embarked on other professional paths – and his cultural sensitivity, which some scholars classify as proto-romantic, shape his appreciation of what he observed in Lisbon and its surroundings. If it is true that the texts he published about his trip to Portuguese lands show his enchantment with some landscapes, such as that of Sintra, for the exotic and picturesque customs of Portuguese society, he did not fail to be ironic and sarcastic in his criticisms towards Portugal as a country with cultural heritages and atavistic ways of being. The fierce criticism aimed at the bullfighting tradition can be highlighted, which he came to witness in the Campo Pequeno arena and which he characterized as a barbaric and cruel sport, typical of underdeveloped people.

In his *Cartas* and in his *Jornada*, published in Italy and London, where he died in the year of the French Revolution of 1789, Giuseppe Baretto discusses his visit to Mafra, to its palace and convent, with the rich library built in the name of the wish for magnificence and European recognition by King D. João V. He assesses and undervalues the importance of this brand-new library, due to the lack of sufficient up-to-date scientific bibliography, in favor of the excessive bibliographic component of a genealogical, chronic, and hagiographic character. He struggles to recognize great authors of universal influence, despite highlighting the remarkable talent of Luís de Camões and Jerónimo Osório, regretting their lack of reception and influence beyond the cultural borders of the Portuguese language. Even Father António Vieira is diminished in light of the emerging enlightened critique to the authors of the cultural production of the Baroque period and also in the context of his dilemmatic assessments of the Jesuits.

If the landscape, history, society, customs, and literary and scientific values of the Portuguese are the object of the judgments of this Italian traveler, the political action under

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<sup>189</sup> Giuseppe Baretto, "Cartas de Portugal", *Op. Cit.*, p. 156.

way by the Marquis of Pombal – who, at that time, only held the noble title of Count of Oeiras – were appreciated in the writings he published two years later about his trip to the country he considers the most exotic in Europe. Pombal is generally appreciated as a very competent and determined minister in carrying out political reform measures, which he finds commendable in many sectors. Although he highlights he considers the statesman competent, he is not always in line with all aspects of his policy, which was changing the country's social, economic, and religious landscape. For example, despite agreeing with the ban on the slave trade in the Portuguese metropolis, a modern initiative, he resists the policy of miscegenation promoted through the political favoring of mixed marriages in the colonies. In fact, this Italian traveler manifests his racial complex when he disparages, in his letters about this trip, the anthropological condition of the mulattos, whom he stereotypically calls “human monsters”. He observes their abundance in the cosmopolitan and multiracial Lisbon of that time. Even more: Baretti does not positively appreciate a European capital like Lisbon, multicolored, where whites, mulattos, and blacks lived and circulated in the streets, nor does he see an added value in such a human landscape. Along these lines, he goes so far as to prejudicially (dis)classify Portugal as the European country closest to Africa, not so much because of its physical geography, but because of the characteristics of its human geography. Giuseppe Baretti's ambivalent assessments are very marked by his Italian culture of origin and the stereotypes with which Portugal was characterized in Europe: an obscurantist, mulatto, almost African country, dominated by the Inquisition...

With regard to Pombal's partially positive political action, two strong criticisms are expressed in these writings from his trip to Portugal. The first one is his relentlessly negative assessment of the measure of extinction of the Society of Jesus, despite some judgments he makes about the Jesuits corresponding to some topics of the black myth built around these sons of Saint Ignatius, namely their avidity for the accumulation of riches and their system of hypocrisy. In any case, he believes that the law to expel the Jesuits and the closure of their network of schools represented an immense cultural, religious, and educational loss. Such an undertaking revealed, according to him, the backwardness and structural ignorance of the Portuguese, who, like what happened – we add – with the Jews, dismissed and lost another important elite for Portugal's qualification, with consequences difficult to reverse in the short term<sup>190</sup>.

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<sup>190</sup> This assessment of the consequences of these measures was reproduced, as in the case of historians such as Eduardo Prado, who emphasized the perspective of criticism of the educational measures of the government of D. José I. He states that the expulsion of the Jesuits represented a second seismic disaster for Brazil. Similarly, Pedro Calmon points out that, following the Pombaline reform and the end of the Society of Jesus' private management of education, the Brazilian literate elite generally regretted the extinction of the Jesuits. Cf. Pedro Calmon, “A reforma da universidade e os dois brasileiros que a planejarão”, *Revista de História das Ideias*, commemorative volume of the Pombaline centenary, 1982, pp. 93-100.

In fact, Baretti seeks to demystify the reckless and conspiratorial military power that the Pombaline anti-Jesuit propaganda attributed to the members of the Society of Jesus, considering them incapable of such efforts and daring: “Their permanent way of life, as it keeps them at a distance from all species of danger, weakens their spirits, and, instead of decision and intrepidity, infuses them with a feminine character of mildness and submission, with a strong mixture of dissimulation and hypocrisy” (translated)<sup>191</sup>.

The second criticism consists in Baretti’s, as an Italian, disagreement with the treatment the Pombal government gave to Cardinal Acciaiuoli, following his attitude towards the expulsion of the Jesuits, which would lead to the severing of relations between the Portuguese court and that of Santa Sé for a decade.

Baretti’s vision, which is reflected in his literary production on the trip to Portugal and on the Pombaline period and government, is marked by critical ambivalence and the use of irony, sarcasm, and humor<sup>192</sup>. On the one hand, the positive assessments of what he observes are in line with his values and the cultural paradigms he considers to be a reference: the Italian and the English. If the Pombaline political enlightenment is valued in terms of the effectiveness and good reason that preside over its reformist measures, it is also criticized for the excesses that result in what he considers consequences of the structural atavism of the Portuguese society, mentality, and culture.

## BRIEF CONCLUSION

Even today, it is very difficult to make a serene assessment of the Pombaline government and the figure of the Marquis of Pombal. This is true especially with regard to the relationship with the high aristocracy, with the Jesuits, and with the Church in general, concerning the reasons that underpinned his claim to submit the Church to the State on the temporal plane, based on the specific political doctrine called regalism. In fact, we still struggle to understand his action and attitudes towards the ecclesiastical universe, which was also very attached to power, at a time when there was an umbilical link between the throne and the altar.

In any case, we think that the Marquis of Pombal acted in accordance with the political philosophy that inspired his praxis: the ideology of the so-called enlightened absolutism and regalism; consequently, the State gained all control over society and the Church. The excesses committed by Pombal in the exercise of power, which we cannot help but regret in the light of our humanist convictions, resulted from too much faith in absolute power to solve the serious social and religious problems that affected our country

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<sup>191</sup> Giuseppe Baretti, “Cartas de Portugal”, *Op. Cit.*, p. 157.

<sup>192</sup> Cf. Luísa Antunes Paolinelli, *Estudos Luso-Italianos – Literatura e Cultura*, Viseu, Sold Out Editions, 2019, pp. 57 and ss.

at the time. As with everything, excesses end up causing too many fractures, often painful. However, never in Portuguese history has power and its absolutist-inspired political instruments been used with such reforming force to transform a traditional mentality comfortably anchored in elites with privileges and prerogatives that did little to adapt the country to the new requirements of the European model of modern progress. In fact, the Marquis of Pombal, with his measures, his way of intervening, and his transformist ideas, can be considered the precursor of important political, educational, and economic transformations<sup>193</sup>.

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<sup>193</sup> I thank, in particular, Professor Luísa Antunes Paolinelli for the data she generously provided me to complete the writing of this article, which I dedicate to her as a tribute and recognition for the hard work she has done to strengthen the ties of knowledge between Portuguese and Italian cultures.

# BIOGRAPHIES AND BIOGRAPHERS OF THE MARQUIS OF POMBAL

PAULO DRUMOND BRAGA<sup>194</sup>

From an early time, many were motivated to write about Sebastião José de Carvalho e Melo (1699-1782), first Count of Oeiras and first Marquis of Pombal. The positions he occupied during the reign of D. José I include, successively, Secretary of State for Foreign Affairs and War (1750-1756) and for Kingdom Affairs (1756-1777). He was generally considered, rightly or wrongly, the outstanding figure of that little more than a quarter of a century, in addition to one of the top names in the history of Portugal.

Soon after he left his power position in March 1777, several texts were produced, some of which are still unpublished. I cite, in the first place, the memoirs of D. José de Mendonça (1725-1808), cardinal patriarch of Lisbon, which provides relevant data, despite the fact that the biographers of the D. José I's protégé did not notice it. The text was buried for almost two centuries in the General Library of the University of Coimbra, having only been published at the dawn of the 21<sup>st</sup> century. It must have started to be written after 1777 in a process that lasted until 1793 or 1799.

The author provided some biographical data about Carvalho e Melo and described him from a physical point of view. In terms of personality, he considered him a perspicacious and eloquent man, in addition to being a tireless worker, who gradually managed to impose his strength on D. José I, pushing away those who could overshadow him and making the sovereign “distrust everyone [...] so that he might have him alone as his most faithful servant and minister” (translated)<sup>195</sup>. Later, he noted that the king had excellent qualities; however, he “did not use them”, leaving Pombal to govern “as he saw fit, convinced that he disposed of everything with justice, and with the Security of His Person and State” (translated)<sup>196</sup>.

The following relevant text is entitled *Vida de Sebastião Joze de Carvalho e Mello Ministro e Secretario de Estado dos Negocios do Reyno de El Rey Fidelissimo D. Jose*

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<sup>194</sup> European Institute of Cultural Sciences Father Manuel Antunes; Aberta University, Center for Global Studies (CEG-UAb), Portugal. This text is part of the project “Pombalia. Para a construção de um corpus pombalino: Parte I – Os Escritos Historiográficos Pombalinos”, funded by the Foundation for Science and Technology (reference: PTDC/HAR-HIS/32197/2017). This work refers to a presentation delivered in Rimini, in May 2019, to the Convegno Annuale della Società Italiana di Studi sul secolo XVIII. L’Invenzione del Pasato nel XVIII Secolo.

<sup>195</sup> Filipe Folque de Mendóça, *O Cardeal Patriarca de Lisboa Dom José de Mendóça. O Homem e o Seu Tempo (1725-1808)*, Lisbon, Universidade Lusíada, 2010, p. 213.

<sup>196</sup> *Id., Ibid.*, p. 444

*Primeiro, Primeiro Conde de Oeyras e Primeiro Marquez de Pombal Lugar Tenente do mesmo Rey* [Life of Sebastião Joze de Carvalho e Mello Minister and Secretary of State for Affairs of the Kingdom of the Most Faithful D. Jose First, First Count of Oeyras and First Marquis of Pombal Lieutenant of the same King]. This piece is still unpublished in the National Library of Portugal<sup>197</sup>. The author, probably a Jesuit, began by clarifying: “I am writing the actions of Sebastião Jozé de Carvalho e Mello that I heard about, for which he became famous and exemplary like no other in the world, based on the impartial annotations that I consider indispensable” (translated)<sup>198</sup>. If he praised Carvalho e Melo for his “good ability, delicacy of wit, and sharpness of judgment”, the author did not fail to mention his “bloody spirit” and “vengeful genius” (translated)<sup>199</sup>. And, almost to the conclusion, he synthesized:

He did not leave a single stone unmoved in the building of the Portuguese Monarchy, disfiguring all its substantial, Catholic, ecclesiastical, regular, political, civil, moral, economic form with which the Portuguese Kings created it. [...] The Marquis of Pombal, who cruelly took the lives of so many, died naturally<sup>200</sup>.

Even in the last years of the 18<sup>th</sup> century and in the first half of the 19<sup>th</sup> century, some books on D. José I’s protégé knew, outside Portugal, the honor of the presses. Firstly, by the Jesuit Francesco Gustà (1744-1816), there was *Vita di Sebastiano Giuseppe di Carvallo e Melo Marc. Di Pombal Conte di Oeyras e Secretario do Stato e Primo Ministro del Rei di Portogallo D. Giuseppe*, printed in Florence in 1781<sup>201</sup>. The author, born in Barcelona, moved around

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<sup>197</sup> In the same library there are two copies, one dated 1803 (codices 634-635) and another undated, with marginal comments and extensive final notes by José Joaquim Vieira Godinho (1730-?), judge of grievances of the Court of Appeals, who considered the author to be a Jesuit (Lisbon, National Library of Portugal, cod. 636). At one point, the annotator classified Pombal as a “wise and patriotic minister” (Lisbon, National Library of Portugal, cod. 636, f. 132v, translated) and attacked the “malevolent and foul-mouthed Jesuit”, author of “a million vague calumnies in his entire work” (Lisbon, National Library of Portugal, cod. 636, f. 99, translated). João Lúcio de Azevedo published and commented on passages from this *Vida* [...] (João Lúcio de Azevedo, “Excerptos de um historiador anonimo do Marquês de Pombal”, *Revista de Historia*, no. 32, 1919, pp. 283-292). Another copy is known, only its second volume, in Lisbon, National Archive of Torre do Tombo, Book Manuscripts, no. 247.

<sup>198</sup> Lisbon, National Library of Portugal, cod. 8507, s.p.

<sup>199</sup> *Id.*, *Ibid.*

<sup>200</sup> Translated: “Elle não deixou huma só pedra sem movimento, no edificio Monarchico Luzitamo, disfigurando toda a sua forma substancial, catholica, eclesiastica, regular, politica, civil, moral, ecomonica com que os Reys Portuguezes o forão irigindo. [...] Morreu naturalmente o marques de Pombal, que a tantos tirou a vida com crueldade” (*Id.*, *Ibid.*).

<sup>201</sup> Published in five volumes. There were several other editions in Italian (Venice, 1781 and Siena, 1781-1782) and even translations into German (*Leben des Sebast. Joseph von Carvalho und Mello, Mar. von Pombal*, Leipzig, 1782), French (*Les Memoires du Marquis de Pombal*, Lyon, 1784) and Castilian (remained original, being conserved in Lisbon, National Library of Portugal, cod. 601-602).

the Italian Peninsula after the expulsion of the Jesuits from Spain, residing successively in Ferrara, Venice, Naples, and Palermo<sup>202</sup>.

Another work is *L'Administration du Marquis de Pombal*, anonymously published in Amsterdam, in 1788, but certainly authored by Pierre Marie Félicité Comartin Dezoteaux, Baron of Cormatin (1753-1812), being considered a response to the aforementioned *Vita* [...]. The list also includes *Les Anecdotes du Ministère du Marquis de Pombal*, which saw the light of day in Warsaw in 1783<sup>203</sup>, and the *Memoirs of the Marquis of Pombal* (1843), by John Smith (1813-1886), later Count of Carnota, brother-in-law and secretary to the future first Duke of Saldanha (1790-1876), undoubtedly the most important grandson of the Marquis of Pombal.

In other words, from an early time, there was a great interest abroad in the figure and government action of the famous Secretary of State of D. José I. Moreover, while Baron of Cormatin and John Smith were in favor of Carvalho e Melo, Gustà inaugurated the anti-Pombaline trend. It should be noted, however, that none of these texts properly constituted a biography.

In the 19<sup>th</sup> century in Portugal, three of the previously mentioned books were translated, *L'Administration* (1841, 1848 e 1900), the *Anecdotes* (1852) and the *Memoirs* (1872). Nonetheless, the Portuguese historiography does not lack in those who focused on Carvalho e Melo. These works referred to some of the aforementioned printed sources, as well as others, namely legislation and diplomatic reports; additionally, they oscillated between praise for certain aspects of Pombal's political action, especially the fight against the Society of Jesus and the nobility, and criticism to the violence of the methods used. Despite the moment when biographies were very successful among the public<sup>204</sup>, with a single exception, the books then published on D José I's protégé were not truly biographical; rather, they were stories from the period 1750-1777.

See the most relevant examples. Simão José da Luz Soriano (1802-1891), an official at the Ministry of the Navy and Overseas, a true unofficial historian of the liberal regime, had the opportunity to publish, in 1867, *Historia do Reinado de El Rei D. José e da Administração do Marquês de Pombal*. Based on sources such as *Recordações* by Jácome Ratton and *Vida* by the Jesuit Gustà, he praised Pombal's "great talent as a statesman" and criticized the "ferocity of his heart" (translated)<sup>205</sup>. When describing episodes such as the execution of Giovanni Pele in 1775, he noted the irregularities of the criminal prosecution, as well

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<sup>202</sup> M. Batlori, "Francesco Gustà", in *Diccionario Histórico de la Compañía de Jesús. Biográfico-Temático*, vol. II, Rome/Madrid, Institutum Historicum S. I./Universidad Pontificia Comillas, 2001.

<sup>203</sup> A second edition was published in 1784.

<sup>204</sup> Sérgio Campos Matos, *Historiografia e Memória Nacional (1846-1898)*, Lisboa, Colibri, 1998, pp. 384-428.

<sup>205</sup> Simão José da Luz Soriano, *Historia do Reinado de D. José e da Administração do Marquez de Pombal*, vol. I, Lisbon, Tipografia Universal, 1867, p. 468.

as the disproportion between the alleged crime and the punishment imposed, alluding to the “tyranny of its ferocious tormentor” (translated)<sup>206</sup>. However, he did not fail, in the last lines of his work, to write that D. José I and Pombal took “giant steps [...] towards the emergence of the first ideas of the liberal system among us and, therefore, towards the establishment of a parliamentary government in Portugal” (translated)<sup>207</sup>.

In 1869, by Francisco Luís Gomes (1829-1869) – a doctor, novelist, and journalist born in Goa, who represented his hometown in the Chamber of Deputies – the book *Le Marquis de Pombal. Esquisse de Sa Vie Publique* was released. The author began by confessing that he was not a historian but that he was looking for the truth<sup>208</sup>, considering that much of what had been written about Sebastião José until then oscillated between the desire for revenge and pure and simple adulation. As almost a century had passed since the death of the protégé, the author believed that the time had come to show “tel qu’il fut”<sup>209</sup>. He had the concerns of a true biographer, mentioning the birth, early years, and training of the future Marquis, along with his first marriage and diplomatic missions, while still characterizing him from a physical and psychological point of view. For his book, he resorted to the printed sources known at the time – he abundantly cited the pro-Pombaline *L’Administration du Marquis de Pombal* – and consulted, in Paris, the archives of the Ministry of Foreign Affairs. He tried to coldly analyze what had happened, slipping here and there to criticize Pombal, specifically in the cases of the Douro wine policy and the repression of the alleged 1775 attempt on Carvalho’s life, but applauding the measures taken in favor of the manufactures and the Asian subjects of the Portuguese Crowns, as well as those against slavery, in addition to the abolition of the distinction between New Christians and Old Christians and the reform of the University of Coimbra. At one point, he wrote that the minister saw conspiracies in everything: “l’ un *était* accusé d’ avoir correspondu avec les jésuites, un autre d’ avoir *été* l’ami du duc d’Aveiro”<sup>210</sup>. However, he was still dazzled by the minister’s “indefatigable activity”, which led him to classify Sebastião José as an “extraordinary man” (translated)<sup>211</sup>. In the conclusion, he called Pombal a “great man” whose main personality trait was audacity. The statesman would have starred in a veritable “social and political cataclysm”, but, according to the author, Portugal would have ended up reaching the liberalism in effect even without his measures (translated)<sup>212</sup>.

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<sup>206</sup> *Id., Ibid.*, pp. 151-158.

<sup>207</sup> *Id., Ibid.*, p. 192.

<sup>208</sup> Francisco Luís Gomes, *Le Marquis de Pombal. Esquisse de Sa Vie Publique*, Lisbon, Imprimerie Franco-Portugaise, 1869, p. 9.

<sup>209</sup> *Id., Ibid.*, p. 6.

<sup>210</sup> *Id., Ibid.*, p. 195.

<sup>211</sup> *Id., Ibid.*, p. 256.

<sup>212</sup> *Id., Ibid.*, pp. 371-374.



1883 refers to the year of the publication of *O Marquez de Pombal*, by José Maria Latino Coelho (1825-1891), deputy and minister of the Navy, who, at the end of his life, adhered to republicanism. In this book, D. José I's protégé is classified as "the greatest minister that Portugal celebrated in its annals" (translated)<sup>213</sup>, "a great statesman" and "a great Portuguese" (translated)<sup>214</sup>, commending his "energy", "perseverance", and "tenacity" (translated)<sup>215</sup>. Although he referred to the "cruel rigor" of Pélé's torture, he did not even question what happened then (translated)<sup>216</sup> and did not fail to assert the indispensability of seeing the Távora process in the light of the spirit of the time<sup>217</sup>. Latino Coelho resorted to sources such as *Vita* and *L'Administration*, as well as the diplomatic offices the Viscount of Santarém summarized in the *Quadro Elementar* [*Elementary Framework*] and the abundant legislation from D. José I's kingdom.

Outside the strictly historiographical scope, there is also some interest in the public opinion concerning the figure of Carvalho e Melo, aroused by events such as the transfer of his mortal remains from the church of Santo António, in Pombal, to the church of Mercês, in Lisbon, in 1856<sup>218</sup>, and, above all, by the first centenary of his death celebrated in 1882. masons, republicans and liberals of various tendencies then used D. José I's protégé as a weapon. They mostly depicted the Pombaline movement as anticlerical and a precursor of liberalism<sup>219</sup>.

As for the books, one can mention the work *Perfil do Marquês de Pombal*, also published in 1882 and authored by the famous writer Camilo Castelo Branco (1825-1890), who already enjoyed a leading place in the Portuguese culture. He had the clear and avowed intention to set the text apart from the laudatory chorus dominant in the centenary com-

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<sup>213</sup> Latino Coelho, *O Marquez de Pombal*, Lisboa, Empresa da História de Portugal, 1905, p. 305.

<sup>214</sup> *Id., Ibid.*, p. 306.

<sup>215</sup> *Id., Ibid.*, p. 307.

<sup>216</sup> *Id., Ibid.*, p. 296.

<sup>217</sup> *Id., Ibid.*, pp. 113-115.

<sup>218</sup> A. H. de Oliveira Marques and J. J. A. Dias, "Pombal na tradição maçónica portuguesa", in *Pombal Revisitado*, vol. I, Lisbon, Estampa, 1984, pp. 65-66, and J. G. Abreu, "Monumento ao Marquês de Pombal", in *Dicionário de História da I República e do Republicanismo*, vol. II, Lisbon, Assembleia da República, 2014, p. 1016.

<sup>219</sup> Cf. A. H. de Oliveira Marques and J. J. A. Dias, *Op. Cit.*, pp. 66-68; Fernando Catroga, "Ritualizações da História", in *História da História em Portugal. Séculos XIX-XX*, vol. II, Lisbon, Temas e Debates, 1998, pp. 304-309; Sérgio Campos Matos, *Op. Cit.*, pp. 444-449; José Eduardo Franco and Annabela Rita, *O Mito do Marquês de Pombal. A Mitificação do Primeiro-Ministro de D. José pela Maçonaria*, Lisbon, Prefácio, 2003, pp. 43-61; José Eduardo Franco, *Mito dos Jesuítas em Portugal, no Brasil e no Oriente (Séculos XVI a XX)*, vol. II, Lisboa, Gradiva, 2007, pp. 119-122; J. G. Abreu, *Op. Cit.*, pp. 1016-1020.

memorations<sup>220</sup>. After many pages, he wrote: “This book cannot please anyone”<sup>221</sup> (translated), continuing: “My great, deep, and unique hatred for the Marquis of Pombal does not come from affection to the priest nor from redress for religion: it is out of love for men” (translated)<sup>222</sup>. Moreover, he very clearly referred to the celebrations as “Pombal of romance”, adding: “The reality of the facts was sacrificed in the name of a borrowed flag. They put this mannequin in front of the Portuguese people – the most rustic people in Europe” (translated)<sup>223</sup>. Once again, the book was far from being a biography, being rather a disconnected set of chapters on D. José I’s protégé.

In 1909, João Lúcio de Azevedo (1865-1933) – who, despite his advanced years, was taking his first steps as a historian, after several years spent living in Brazil – he generated *O Marquês de Pombal e a Sua Época*, in which he sought some objectivity. The biography of the minister was secondary one more time, given its dilution in the history of his political action. The book concludes by stating that, especially from 1882 onwards, “the twisted despot was transformed into a choir of liberty” (translated)<sup>224</sup>. This is one of the striking texts about Carvalho e Melo. It was republished in 1922, while the author was still alive, with, as one might expect, some recent prints<sup>225</sup>.

The interest in the figure of the Marquis of Pombal continued after the establishment of the Republic, especially because it was a regime deeply marked by masonry and with a relevant anticlerical facet. In 1915, the government commissioned António Ferrão (1884-1961), at the time head of the Public Instruction department, to carry out a work, in six volumes, on *A Vida e a Obra Governativa do 1.º Marquês de Pombal* [*The Life and Government Work of the 1<sup>st</sup> Marquis of Pombal*]. The author of the ambitious project clarified, two years later, that he had written the proposal addressed to the Minister of Public Instruction<sup>226</sup>. António Ferrão published, in 1917, the summaries of the first two volumes and the plan of the work, which was as follows: volume I, *A Europa durante o Século XVIII* [*Europe during the 18<sup>th</sup> Century*]; volume II, *O Marquês de Pombal como Diplomata* [*The Marquis of Pombal as a Diplomat*]; volume III, *O Governo do Marquês de Pombal. Obra Política* [*The Government of the Marquis of Pombal. Political Work*]; volume IV, *O Governo do Marquês de Pombal. As Reformas Económicas* [*The Government of the Marquis of Pombal. The Economic Reforms*]; vol-

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<sup>220</sup> Cf. P. J. M. Ferreira, *Camilo, Biógrafo do Marquês de Pombal. O Mito do Condenado Impune*, Master’s dissertation presented to the Universidade Nova de Lisboa, Lisboa, policopied text, 2002; José Eduardo Franco and Annabela Rita, *Op. Cit.*, pp. 61-87; José Eduardo Franco, *Op. Cit.*, pp. 157-163.

<sup>221</sup> Camilo Castelo Branco, *Perfil do Marquês de Pombal*, Porto, Lello & Irmão, 1982, p. 3.

<sup>222</sup> *Id.*, *Ibid.*, p. 4.

<sup>223</sup> *Id.*, *Ibid.*, p. 5.

<sup>224</sup> João Lúcio de Azevedo, *O Marquês de Pombal e a Sua Época*, Lisbon, Clássica, 1990, p. 313.

<sup>225</sup> In 1990, 2008, and 2009.

<sup>226</sup> António Ferrão, *A Vida e Obra Governativa do 1.º Marquês de Pombal. Plano e Sumários do 1.º e 2.º Volumes da Publicação Mandada Efectuar pelo Governo da República*, Coimbra, Imprensa da Universidade, 1917, p. 3.

ume V, *O Governo do Marquês de Pombal. As Reformas do Ensino* [The Government of the Marquis of Pombal. The Education Reforms]; volume VI, *O Processo contra o Marquês de Pombal* [The Case against the Marquis of Pombal]. He then had the opportunity to note: “it is time to dignify the great figure of our Marquis of Pombal, presenting him as he was, with his great qualities and not small defects” (translated)<sup>227</sup>. Although he did not produce the great work entrusted to him, he published numerous articles between 1915 and 1938, some of which are still important today for the knowledge of Carvalho e Melo’s life and political action<sup>228</sup>.

In the 1920s and 1930s, the controversy between the philopombalists and antipombalists was revived in public opinion. This was brought about by events such as the transfer of Carvalho e Melo’s remains to the Memory Church, in Lisbon (1923), where they have remained since then. Everything related to the monument that stands today in the Lisbon square that bears his name was also relevant, specifically the launching of the first stone (1926) and its inauguration (1934)<sup>229</sup>.

However, texts for and against Pombal continued to be produced, the latter mainly by monarchists linked to integralist ideas, such as Alfredo Pimenta (1882-1950), Caetano Beirão (1892-1968), and João Ameal (1902-1982)<sup>230</sup>. As for those who sought to defend D. José I’s protégé, reference should be made to the publications of his descendants produced especially in the 1930s and 1940s, João Saldanha Oliveira de Sousa, second Marquis of Rio Maior (1878-1970)<sup>231</sup> and João de Carvalho Daun e Lorena (1879-1944)<sup>232</sup>.

However, the Estado Novo [New State] period ended up, especially from the 1940s onwards, by appropriating the figure of Carvalho e Melo, whose political action could easily serve the regime. As Luís Reis Torgal wrote, “his work of rebuilding Lisbon could be used as a parameter for public works” of Salazarism. “Pombaline authoritarianism, on the other hand, could serve as a foundation for Salazar’s power doctrine” (translated)<sup>233</sup>.

Yet, there was still a lack of biographies of Carvalho e Melo. Gap that Marcus Cheke (1906-1960) sought to fill in 1938, an Englishman who worked at the United Kingdom

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<sup>227</sup> *Id., Ibid.*, pp. 10-11.

<sup>228</sup> António Barreto (org.), *Marquês de Pombal. Catálogo Bibliográfico e Iconográfico*, Lisbon, Biblioteca Nacional, 1982, pp. 121-122, 261.

<sup>229</sup> J. G. Abreu, *Op. Cit.*, p. 1016.

<sup>230</sup> Luís Reis Torgal, “Pombal perante as ideologias tradicionalistas, católicas e salazaristas”, in *História e Ideologia*, Coimbra, Minerva, 1989.

<sup>231</sup> Descendant of Maria Amália de Carvalho e Daun (1756-1812), youngest daughter of King D. José’s protégé.

<sup>232</sup> Descended from the third Marquis of Pombal, José Francisco Xavier Maria de Carvalho Melo e Daun (1753-1821), second son of Sebastião José de Carvalho e Melo. Cf. António Barreto, *Op. Cit.*, pp. 155, 230-231, 86.

<sup>233</sup> Luís Reis Torgal, *Op. Cit.*, p. 88.

embassy in Lisbon and who published *Dictator of Portugal: A Life of the Marquis of Pombal*. The author began by pointing out the fact that, in a Europe where there were several dictators, “it is interesting to examine the career of a dictator who in many respects may be regarded as a prototype of such ruler”<sup>234</sup>, to write later, unsurprisingly: “The life of Pombal helps one to appreciate the measure of Dr. Salazar’s achievement in reorganizing his country’s economic system and re-establishing her credit”<sup>235</sup>. Nonetheless, he did not fail to point out that Salazar had done so “without unnecessary severity, in fact without the tyranny which made Pombal’s name terrible”<sup>236</sup>. This book was translated into Portuguese in 1946 and constitutes one of the few biographies of Carvalho e Melo.

A turning point in the historiography of this figure occurred in 1951, when Jorge Borges de Macedo (1921-1996) published *A Situação Económica no Tempo de Pombal. Alguns Aspectos* [*The Economic Situation in Pombal’s Time. Some Aspects*], who had composed a teaching degree thesis in Historical-Philosophical Sciences, defended in 1944 at the Faculty of Arts of the University of Lisbon. In the words of Jorge Pedreira, “a discreet influence of Karl Marx’s thought [permeates the work], both through the use of certain concepts and the content of some interpretations”, adding that “in the denial of a coherent Pombaline program and in the devaluation of Pombal’s undertakings, one can read a criticism to providential men and, therefore, a veiled censure of the Salazar regime”<sup>237</sup> (translated). In fact, Jorge Borges de Macedo was then in the opposition to the Estado Novo, finding himself very close to the Portuguese Communist Party. On the other hand, *A Situação Económica* [...] is undoubtedly marked by the historiographical principles of the so-called *Annales* school, of which the author was certainly one of the promoters in Portugal, following the path of his professor and intellectual mentor in college, Vitorino Magalhães Godinho (1918-2011).

Jorge Borges de Macedo called attention to the need to break with the partisan history of the Pombaline phenomenon and to check preferentially the conditions of the conjuncture:

In order to overcome the debate between pombalists and antipombalists and – more importantly – to overcome the error of the historical perspective that consists in making D. José’s minister the explanation of a quarter of a century of the history of Portugal, we have to understand his environment, his time, his problems, his difficulties and needs, the field, the possibilities and conditions of action within

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<sup>234</sup> Marcus Cheke, *Dictator of Portugal. A Life of the Marquis of Pombal. 1699-1782*, London, Sidgwich and Jackson, 1938, p. VII.

<sup>235</sup> *Id., Ibid.*, p. VII-VIII.

<sup>236</sup> *Id., Ibid.*, p. VIII.

<sup>237</sup> Jorge Pedreira, “Macedo, Jorge Borges de”, in *Dicionário de História de Portugal*, vol. VIII [II of supplement], Porto, Figueirinhas, 1999, p. 405.

which the minister moved. What are the economic, social, political, and cultural problems? What, so to speak, was the historical “tone” of our 18<sup>th</sup> century?<sup>238</sup>

In the 60s and 70s, already a professor at the Faculty of Arts of the University of Lisbon, which he joined in 1957, Jorge Borges de Macedo resumed producing some texts on Pombal and his time. They continue, for the most part, focusing on current readings, either due to the attractive proposals or the pertinent inquiries proposed. I emphasize a short essay from the collective work *Grandes Portugueses* [*Great Portugueses*] and two entries published in the *Dicionário de História de Portugal* and in the *Enciclopédia Verbo*<sup>239</sup>. However, none of them can be considered a biography.

1982 and 1999 were years of new Pombaline centenarians. The first marked two centuries since the death of Carvalho e Melo and the second 300 years since his birth. On both occasions, especially on the first one, the motivation of historians was great, with the organization of scientific congresses, as well as publications and new book editions. For instance, in 1982, a new edition of *A Situação Económica* [...], by Jorge Borges de Macedo, was released, an author who, under the seal of the National Library, also published a “political biography” of Sebastião José<sup>240</sup>.

It was also in the commemorative context of 1982 that, on the initiative of the Lisbon, Oeiras, and Pombal municipal councils, a new biography of the 18<sup>th</sup>-century statesman was produced. The task was entrusted to Joaquim Veríssimo Serrão (1925-2020), full professor at the Faculty of Arts of the University of Lisbon and president of the Portuguese Academy of History, whom a large audience, especially those most interested in the country’s past, knew for his *História de Portugal* [*History of Portugal*], which started to be published in 1977 – the volume from this work concerning the second half of the 18<sup>th</sup> century came out, in a very opportune way, in 1982.

Veríssimo Serrão, who entitled his book *O Marquês de Pombal. O Homem, o Diplomata e o Estadista* [*The Marquis of Pombal. The Man, the Diplomat, and the Statesman*], began by confessing that his intention was to “reconstitute a life to integrate it, whenever possible, into the history of time”, based on the work of “the character Sebastião José de Carvalho

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<sup>238</sup> Translated: “Para se ultrapassar o debate entre pombalistas e antipombalistas e – o que é muito mais importante – para se ultrapassar o erro de perspectiva histórica que consiste em fazer do ministro de D. José a explicação de um quarto de século da história de Portugal, temos que conhecer o seu meio, a sua época, os seus problemas, as suas dificuldades e necessidades, o campo, as possibilidades e condições de ação dentro das quais se moveu o ministro. Quais os problemas económicos, sociais, políticos e culturais? Qual era, digamos assim, o ‘tónus’ histórico do nosso século XVIII?” (Jorge Borges de Macedo, *A Situação Económica no Tempo de Pombal. Alguns Aspectos*, Lisbon, Gradiva, 1989, p. 43).

<sup>239</sup> António Barreto, *Op. Cit.*, pp. 156-157.

<sup>240</sup> Jorge Borges de Macedo, *O Marquês de Pombal. 1699-1782*, Lisbon, Biblioteca Nacional, 1982. It was later included in the preface to the 3.<sup>rd</sup> edition, published in 1989, of *A Situação Económica no Tempo de Pombal* [...] (Jorge Borges de Macedo, *Op. Cit.*, pp. 14-20).

e Melo in the terrestrial itinerary he was given to travel”. Later on, he cautiously warned: “Perhaps I will not be able to present Sebastião José de Carvalho e Melo in the very rich range of his personality”. Moreover, although he considered the debate for or against D. José I’s protégé to be wrong, he did not fail to take a clear and evident side, writing: “The Marquis of Pombal will remain as one of the 5 or 6 great statesmen that over 800 years guided the destinies of Portugal” (translated)<sup>241</sup>.

In 1995, between two centenaries, emerged from the pen of an English historian, Kenneth Maxwell – a professor at Columbia University in New York and a specialist in Portuguese and Brazilian history –, a relevant contribution, *Pombal, Paradox of the Enlightenment*. The book was translated into Portuguese first in Brazil (1996) and only later in Portugal (in 2001)<sup>242</sup>. Akin to many previous texts, the biographical part was secondary and the history of Carvalho e Melo’s governance was privileged.

In the aforementioned year of 1999, among the various initiatives of the Pombaline centenary, reference should be made to a text by João Bernardo Galvão Teles. Despite a fundamentally genealogical nature, it was also concerned with systematizing basic biographical information about the Marquis de Pombal<sup>243</sup>. The work was later re-edited with changes and integrated into a work that intended to study Carvalho e Melo’s entire family<sup>244</sup>.

More recently, there is a veritable multitude of books and articles by authors from diverse backgrounds and historiographical schools, in which one of the major concerns has been the demystification of the figure of D. José I’s protégé. I highlight, with no worries for an exhaustive list, the names of José Eduardo Franco<sup>245</sup>, Joaquim Romero Magalhães (1942-2018)<sup>246</sup>, José Subtil<sup>247</sup>, and Nuno Gonçalo Monteiro<sup>248</sup>.

In 2020, Pedro Sena-Lino, a doctor in Portuguese Literature from the 17<sup>th</sup> century, with no work as a historian, published a new biography of the Marquis of Pombal, which gets

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<sup>241</sup> Joaquim Veríssimo Serrão, *O Marquês de Pombal. O Homem, o Diplomata e o Estadista*, Lisbon, Câmara Municipal de Lisboa, 1987, pp. 6-7.

<sup>242</sup> And again, by another press, in 2015.

<sup>243</sup> João Bernardo Galvão Teles, “Memória genealógica”, in *Sebastião José de Carvalho e Melo, 1.º Conde de Oeiras, 1.º Marquês de Pombal*, Oeiras/Lisbon, Câmara Municipal de Oeiras/Universidade Lusíada, 1999.

<sup>244</sup> *Id.*, *Geração Pombalina. Descendência de Sebastião José de Carvalho e Melo*, vol. I, Lisbon, Dislivro, 2007.

<sup>245</sup> Cf. José Eduardo Franco and Annabela Rita, *Op. Cit.*; José Eduardo Franco, *Op. Cit.*

<sup>246</sup> Joaquim Romero Magalhães, “Sebastião José de Carvalho e Melo e a economia do Brasil”, *Revista de História Económica e Social*, 2<sup>nd</sup> serie, no. 8, 2004, pp. 9-35.

<sup>247</sup> José Manuel Subtil, *O Terramoto Político (1755-1759). Memória e Poder*, Lisbon, Universidade Autónoma de Lisboa, 2007; José Manuel Subtil, “Pombal e o rei: Valimento ou governamentalização?”, *Ler História*, no. 60, 2011, pp. 53-69.

<sup>248</sup> Nuno Gonçalo Monteiro, *D. José na sombra de Pombal*, Lisbon, Círculo de Leitores/Centro de Estudos dos Povos e Culturas de Expressão Portuguesa – Universidade Católica Portuguesa, 2006.

lost right in the beginning for focusing a little excessively on the phase prior to the statesman's rise to power. It is a stylistically exquisite text that employs a wide range of sources, both handwritten and printed, some of which are almost completely ignored by Portuguese historians. At the same time, the author never rejected the dialogue with those who had previously written about the statesman and his time, although some fundamental titles are missing. On the other hand, some options at the methodological level, especially with regard to documentary and bibliographic endorsements, make it enormously difficult for historians to use this book<sup>249</sup>.

In short, and forgetting the 18<sup>th</sup> century texts – which work mainly as sources for current historians – there have truly been only five biographies of Carvalho e Melo, by Francisco Luís Gomes (1869), Marcus Cheke (1938), Joaquim Veríssimo Serrão (1982), João Bernardo Galvão Teles (1999), and Pedro Sena-Lino (2020). It could be said that Clio's followers were always more concerned with the Portuguese conjuncture from 1750 to 1777 than with the life of the figure who is considered to have been the most outstanding one in Portuguese history in those same years. It almost seemed that there was a fear of looking bad if, instead of analyzing, to use the words of Jorge Borges de Macedo, “the economic, social, political, and cultural problems” (translated)<sup>250</sup> of Pombal's time, one opted for a biography. Despite the remarkable efforts of the aforementioned five authors from the 19<sup>th</sup>, 20<sup>th</sup>, and 21<sup>st</sup> centuries, many facets of this fascinating man who lived 83 years and was called Sebastião José de Carvalho e Melo remain largely undiscovered.

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<sup>249</sup> Pedro Sena-Lino, *De quase Nada a quase Rei. Biografia de Sebastião José de Carvalho e Melo, Marquês de Pombal*, Lisbon, Contraponto, 2020.

<sup>250</sup> Jorge Borges de Macedo, *A Situação Económica no tempo de Pombal [...]*, *Op. Cit.*, p. 43.

# THE DISCOVERY OF THE POPULATION: CALCULUS AND POLITICS IN POMBAL'S LONDON STAY

JOÃO NUNES DE ALMEIDA<sup>251</sup>

There is an apparently innocuous moment in the history of the 18<sup>th</sup> century in Portugal, when Diogo de Mendonça Corte Real, minister of D. João V, left the papers of the state secretariats to be organized after his death on May 9, 1736<sup>252</sup>. This veiled criticism by D. Luís da Cunha<sup>253</sup> (2013) would be followed by the reorganization of the Portuguese State through the creation of the state secretariats of the Kingdom, of the Navy and Overseas, and of Foreign Affairs and War as a response to the growing complexity of the governmental process. Such a decision by D. João V indicates an emerging rationality in western governance, which is derived from a crisis of knowledge, particularly expressive in the British Isles of the 1600s, and which resulted in a dominant *reading* of reality based on the quantification of human activities<sup>254</sup>. As per Deringer<sup>255</sup> (2018), this epistemological rupture operated by figures such as William Petty is neither confined to a disinterested sphere nor immune to the profane action of governments. The quantification of State affairs is part of a logic of power and knowledge that consists of “looking for” the obscure origins of money<sup>256</sup>. It is not by chance that it took on special importance after the *Glorious Revolution* in 1688. The attempt to find the origin of money and, consequently, that of the creation of value in the Modern State is embedded in the sovereign conflict between the Crown and the British parliament that vehemently emerges stronger from the British revolution. Henceforth, members of the British parliament seek to know where and how the Crown and the State use money. In this conflict, the hitherto strange way of using numbers in arguments within the political arena gains predominance<sup>257</sup>. Technical issues of a financial nature progressively become a political issue to be debated in parliament.

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<sup>252</sup> José Barreto, “Introdução”, in Sebastião José de Carvalho e Melo, *Escritos Económicos de Londres (1741-1742)*, Lisboa, Biblioteca Nacional, 1986.

<sup>253</sup> Luís da Cunha, *Testamento Político ou Carta de Conselhos ao Senhor D. José sendo Príncipe*, Lisboa, Biblioteca Nacional, 2013.

<sup>254</sup> William Deringer, *Calculated Values: Finance, Politics, and the Quantitative Age*, London, Harvard University Press, 2018.

<sup>255</sup> William Deringer, *Op. Cit.*

<sup>256</sup> *Id., Ibid.*, p. 43.

<sup>257</sup> William Deringer, *Op. Cit.*



The new problem of security is inscribed in this quantification of social phenomena to understand the new dynamics of commerce and the expansion of mercantile activity. As Foucault<sup>258</sup> seeks to clarify in his 1977-1978 course at the Collège de France, one cannot only deduce the repressive side of social control when it comes to security. The very emergence of the idea of population is a product of this innovative problem, which consists of creating and ensuring the conditions for the circulation of goods and, consequently, the expansion of the world market<sup>259</sup>. In other words, the idea of population is generated by the emerging security apparatuses<sup>260</sup> that quantify European societies to reproduce and safeguard the human species<sup>261</sup>. One can say that the idea of nature, *physis*, is mobilized through a rationality that aims to promote the human species. An example of this is the government's concern to prevent catastrophes, pandemics, or any other destructive natural phenomena.

Therefore, the territorial State of the Machiavellian prince gradually transitions to modern State: more than a merely sovereign and border space, we now have a space that seeks the security of the population<sup>262</sup>. In this context, the method itself produces a new reality through its treatment and analysis<sup>263</sup>. In other words, the quantification of the multiple social formations, which one tries to understand through techniques of interpretation that allow the generation of what we today call population, reproduces a quantified and quantifying reality. In this scenario, the arithmetical method is not different from the

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<sup>258</sup> Michel Foucault, *Security, Territory, Population: Lectures at the College de France, 1977-78*, Basingstoke, Palgrave Macmillan, 2007.

<sup>259</sup> *Id.*, *Ibid.*

<sup>260</sup> Foucault, *Op. Cit.*, essentially characterizes security apparatuses in their spatial, temporal, normalizing, and population dimensions. Regarding the spatial dimension, security apparatuses are distinguished from pre-modern spaces because, in the words of Foucault (p. 67), they are “centrifugal”, that is, they make the primacy of the circulation of goods increasingly expand beyond the walls of the prince's sovereign territory. In their temporal characteristic, security apparatuses respond to what Foucault (p. 25) defines as “aleatory” (in the sense of uncertainty): Foucault shows this temporal dynamics of security through the contrast between the example of anti-scarcity mechanisms, which were used to prevent catastrophic events that would lead to urban uprisings and which consisted essentially of controlling wheat prices, and the physiocratic principle of freedom of movement as the most efficient means to prevent potential rebellions. To describe the normalizing (and non-normative) component of security apparatuses, Foucault gives the example of the smallpox outbreaks in the 18<sup>th</sup> century and the corresponding discovery of treatment. Foucault sees this “crude empiricist” practice of inoculating smallpox to combat the disease – *variolation* – as an illustration of the safety apparatuses paradigm: it is no longer just a matter of preventing scarcity but of finding in the catastrophes themselves the dimension that allows to make them *normalizing* to the population.

<sup>261</sup> Ian Hacking, “Biopower and the avalanche of printed numbers”, *Biopower: Foucault and Beyond*, London, The University of Chicago Press, 1982, pp. 65-81.

<sup>262</sup> Michel Foucault, *Op. Cit.*

<sup>263</sup> John Law, *After Method: Mess in Social Science Research*, Oxon, Routledge, 2004.

reality it generates: the English parliament by controlling and becoming aware of public finances, especially after the Revolution of 1688, increasingly pushes back the Crown from these matters<sup>264</sup>. The progressive public legitimation of calculation as a way of exercising political power is an important factor, therefore, to the emergence of political arithmetic and its Promethean method of quantifying an entire territory and population in order to extract as much wealth as possible from them.

Even so, it is convenient to contextualize political arithmetic in a power genealogy that goes back to the British colonization of Ireland in the 17<sup>th</sup> century<sup>265</sup>. This is when we find William Petty as director of Down Survey (1655), a key device in the Cromwellian strategy of expropriating lands belonging to Catholics that Protestants would later colonize<sup>266</sup>. Although censuses had already taken place<sup>267</sup> with the purpose to delimit Irish lands to be handed over to Protestants, it is with Petty that the division of labor in surveying productive land is introduced, effectively triggering the commodification of the Irish territory<sup>268</sup>. The Down Survey is, therefore, a key piece to understand the origin of the relationship between territory and population in the modern age<sup>269</sup>.

So, it is already in the triumphant times of such a method of building a society based on the mathematical precepts of arithmetic politics that the future Marquis of Pombal arrived in the English metropolis in 1734. Plus, the political and social context of the United Kingdom was markedly distinct from that of the Iberian monarchies<sup>270</sup>. The Georgian era is a product not only of a political and economic revolution but also of the secularization of ecclesiastical and sovereign powers brought about by the Reformation: George II is a sovereign who responds to a parliament with a rationale of political-economic interests with the security paradigm progressively being consolidated as a form of governance in modern states. They are, therefore, two types of State with very distinct governance situ-

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<sup>264</sup> William Deringer, *Op. Cit.*

<sup>265</sup> Ted McCormick, *William Petty and the Ambitions of Political Arithmetic*, New York, Oxford University Press, 2009.

<sup>266</sup> *Id.*, *Ibid.*

<sup>267</sup> Aaron James Henry, "William Petty, the Down Survey, population and territory in the Seventeenth century", *Territory, Politics, Governance*, vol. 2, n.º 2, 2019, pp. 218-237.

<sup>268</sup> Ted McCormick, *Op. Cit.*

<sup>269</sup> Another important element in the genesis of political arithmetic, intrinsically linked to Petty's activities in Ireland, has to do with the Hartlib circle, an extensive network of Protestant intellectuals whose agenda is to propagate Francis Bacon's scientific empiricism (Barbara Shapiro, *Probability and Certainty in Seventeenth-Century England: A Study of the Relationships between Natural Science, Religion, History, Law, and Literature*, Princeton, Princeton University Press, 1985). For this network of intellectuals, Ireland was the ideal place to develop a social project based on the quantifying rationalization of the Irish population and territory (Ted McCormick, *Op. Cit.*).

<sup>270</sup> Francisco José Calazans Falcon, *A Época Pombalina: Política Económica e Monarquia Ilustrada*. São Paulo, Editora Ática, 1993.

ations. The political arithmetic is based on social and political assumptions different from the governance of D. João V, and much of Pombal's diplomacy involves the negotiation and adjustment of these two state worldviews.

Before all else, the religious question raised by Protestantism is the main difference between Iberian states and the rest of the European territory northwards of Pyrenees<sup>271</sup>. In accordance with the thesis of the secularization of Protestant conduct, Max Weber<sup>272</sup>, but also forgotten authors from that time such as R.H. Tawney<sup>273</sup>, see the necessary freedom for commercial activity in the criticism of the Roman papacy. This would explain the success of the Protestant population in dominating mercantile activities as opposed to the monopoly of economic and political activities from the high aristocracy in line with the Roman and state ecclesiastical power<sup>274</sup>. One may add to this explanation the censorship in Portugal of the great lines of thought that contributed to the secularization of Christianity, among which the works of Locke, Spinoza, Newton, and Descartes stand out. All this leads Falcon<sup>275</sup> to conclude that, in Portugal, transcendence was not shaken by the secularizing immanence that would become an essential background to understand commercial exchanges and social relations in emerging capitalist societies.

However, the secular hypothesis Max Weber<sup>276</sup> raises is hardly separated and isolated from the social question. This particularly pressing in the British context, accentuating the cleavage between the Portuguese 18<sup>th</sup> century and the British 18<sup>th</sup> century. In addition to accelerating the commodification of politics and introducing technological innovations in the calculation of territory and population, the English political upheaval of 1640, even before 1688, came above all to establish a new configuration of British society, promoting a bourgeois elite distinct from the rentier aristocracy of the *Gilds* and feudal *manors*<sup>277</sup>. This same elite is supported by the popular groups that claim autonomy from this feudal corporatism<sup>278</sup>. In turn, in Portugal, the context is different from the British one, given that the great aristocracy, allied with the State and ecclesiastical power, drives accumulation in the colonies, which constitutes an obstacle to the modernization of the metropolitan territory by groups of the commercial and manufacturing bourgeoisie<sup>279</sup>.

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<sup>271</sup> Francisco José Calazans Falcon, *Op. Cit.*

<sup>272</sup> Max Weber, *The Protestant Ethic and the Spirit of Capitalism*, London, Routledge, 2001.

<sup>273</sup> R. H. Tawney, *Religion and the Rise of Capitalism: A Historical Study*, London, Verso, 2015.

<sup>274</sup> Francisco José Calazans Falcon, *Op. Cit.*

<sup>275</sup> *Id., Ibid.*

<sup>276</sup> Max Weber, *Op. Cit.*

<sup>277</sup> Christopher Hill, *The Century of Revolution: 1603-1714*, London, Routledge, 2002.

<sup>278</sup> *Id., The English Revolution 1640*, London, Lawrence and Wishart, 1940.

<sup>279</sup> Francisco José Calazans Falcon, *Op. Cit.*

Considering this contrast between two distinct social formations, Portugal's envoy to London manages the contradictions arising from treaties signed between the two Crowns, which are slow to be fulfilled by the British, thus trying to find a geopolitical balance between two different states in terms of population and military capability. All of this in a period when trust was placed in diplomatic efforts to reaffirm the dispute over colonial markets. However, Pombal's stay in England allows for other interpretations beyond the geopolitical reading that tends to focus exclusively on the economic framework of dependence of the Portuguese State on the British State<sup>280</sup>. In a recent biography of Pombal, Sena-Lino<sup>281</sup> highlights, in a way, the emergence of a rupture, which we could call, based on Pierre Bourdieu<sup>282</sup>, *cultural capital* in the reorganization of western societies in the 1700s. The same biography clearly shows how Pombal is someone who discovers very early on the new element of *distinction* to ascend economically and socially, something evident given his effort to become an illustrated *persona*.

Two institutions *value* Pombal's cultural capital and give him the necessary distinction to gain access to the circles of influence close to the royal power. The entry into the Royal Academy in Portugal and into the Royal Society in London is a key element for Pombal's social mobility. It configures a very distinct mark of the ongoing paradigm shift regarding the mechanisms of power legitimation. Created in 1660 based on Francis Bacon's empiricist precepts, the Royal Society intended to promote scientific knowledge through the experimental route to the detriment of scholasticism<sup>283</sup>. The inductive method is valued, grounded on observation and collection of empirical data, in order to arrive at the "natural principles of scientific certainty"<sup>284</sup>. To this end, the collection of empirical data is essential to create "natural histories" underpinned by facts that work as a counterpoint to narratives distorted by myths and legends<sup>285</sup>.

Despite the epistemological rupture triggered by British empiricism, the foundations of the metaphysics underlying the quantifying rationality that conditions political-diplo-

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<sup>280</sup> Sideri's 1978 study, *Comércio e Poder* [Commerce and Power], is a clear example of this kind of interpretation, which sees a sort of colonialism dictated by Portugal's military dependence in terms of commercial relations between Portugal and Great Britain. The modernization of the Portuguese State was compromised by the lack of political support for the mercantile and manufacturing bourgeoisie: "By conserving the empire *with* British help, the agrarian aristocracy neutralized all attempts to modernize Portugal economically and politically, given that the social class linked to commerce and industry could not be supported by a parliament as in England [...]" (Sandro Sideri, *Comércio e Poder: Colonialismo Informal nas Relações Anglo-Portuguesas*, Lisboa, Cosmos, 1978, p. 153).

<sup>281</sup> Pedro Sena-Lino, *De quase Nada a quase Rei. Biografia de Sebastião José de Carvalho e Melo, Marquês de Pombal*, Lisboa, Contraponto, 2020.

<sup>282</sup> Pierre Bourdieu, *Distinction: A Social Critique of the Judgement of Taste*, Oxon, Routledge, 2010.

<sup>283</sup> Barbara Shapiro, *Op. Cit.*

<sup>284</sup> *Id. Ibid.*, p. 18, translated.

<sup>285</sup> *Id. Ibid.*, p. 19, translated.

matic action were laid. The concept here is that of metaphysics, in the sense that a totalizing vision of reality is imposed while difference in interpretation and discourse is politically disregarded<sup>286</sup> if it does not encompass the dispute over world trade. In this sense, today we are no longer able to extremely separate the Iberian from the Anglo-Saxon context, based on the idea of secularization of a method, the political arithmetic, purged of any belief. The thesis of secularization and the *disenchantment of the world*, in relation to which Weber<sup>287</sup> advances to explain the elective affinity between capital and the Protestant Reformation, should rather be understood as a mutation process of beliefs and conduct. Moreover, recent works show a confluence of concepts that question epistemological boundaries, which are still very much indebted to Enlightenment modernity, by showing genealogies of security and economic terms in Christian theology<sup>288</sup>. The following analysis of Pombal's economic texts is in line with the interpretation of security which is skeptical of the separation between a supposedly atheistic field, for being grounded on empirical principles, and a theistic field supposedly distinct from the rationality of economic policy.

## SECURITY MECHANISMS AND ECONOMIC POLICY

Pombal's familiarity with the method of quantifying territory and population, *political arithmetic*, is attested not only by the works he acquired in London but also by his manuscripts which explicitly reference William Petty's ideas. The catalog of his library in London includes not only Petty's *Political Arithmetick* but also eight volumes of Charles Davenant's work. António César Santos<sup>289</sup> has already extensively worked on the presence of political arithmetic in Pombal's thought and action, considering the degree of influence

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<sup>286</sup> Gianni Vattimo, *Nihilism and Emancipation: Ethics, Politics, Law*, New York, Columbia University Press, 2004.

<sup>287</sup> Max Weber, *Op. Cit.*

<sup>288</sup> Roberto Esposito, *The Machine of Political Theology and the Place of Thought*, New York, Fordham University, 2015; Michael Dillon, "Spectres of biopolitics: Finitude, *eschaton*, and *katechon*", *South Atlantic Quarterly*, vol. 110, n.º 3, 2011, pp. 780-792; Marieke De Goede, *Virtue, Fortune, and Faith: A Genealogy of Finance*, Minneapolis, University of Minnesota Press, 2001.

<sup>289</sup> António César Santos, "Aritmética política e a administração do Estado português na segunda metade do século XVIII", in Andréa Doré and António César de Almeida Santos (org.), *Temas Setecentistas: Governos e Populações no Império Português*, Curitiba, UFPR/Fundação Araucária, 2009, pp.143-152; *Id.*, "O mecanismo político pombalino e o povoamento da América portuguesa na segunda metade do século XVIII", *Revista de História Regional*, vol. 15, n.º 1, 2010, pp. 78-107; *Id.*, "Pombal e a política econômica portuguesa na segunda metade do setecentos", in *Anais do V Congresso Internacional de História*, vol. 1, Maringá, Editora da UEM, 2011, pp. 2797-2805; *Id.*, "Aritmética política e governo no reinado de D. José I (Portugal, 1750-1777)", in *Anais do VI Congresso Internacional de História*, 2013: <http://www.cih.uem.br/anais/2013/index.php?l=trabalhos&buscar=Aritm%EDtica+Pol%EDtica&idc=> (consulted online on June 18, 2021).

exerted on him. However, these Pombaline texts reveal another facet re-analyzed and elucidated here, which concerns their inscription in the security discourse.

If the problematization of security is understood as the emergence of apparatuses that create the object of population and territory for commercial purposes (Foucault, 2007), the autograph *Political Mechanism*<sup>290</sup> is a clear discursive example. The manuscript reveals, therefore, evidence of how Pombal understands the governmentalization of power and the modern State<sup>291</sup>. The object of this governmentalization is not the *people* as political subjects but the population as an essential variable to take commercial advantages in a given territory. In this sense, *Political Mechanism*<sup>292</sup> introduces the distinction Foucault had already pointed out as a key to understanding the emergence of security: the difference between people and population corresponds to the difference between “reign” and “govern”<sup>293</sup>. Considering the situation of the Portuguese State regarding its relations with the British court of the 1700s, it is not surprising that Pombal sought to reverse the trade imbalance that favored the British State, mainly due to the non-compliance with the treaties agreed upon between the two states. However, *Political Mechanism*<sup>294</sup> is more than an attempt to incorporate a British method of governance in foreign territory. The manuscript highlights the confluence between a pedagogical project and a project of power. It is, first, a text “dedicated to the youth” so that they know the governance “rules” necessary for a “small country” to seek “advantages” that go against its small size in commerce<sup>295</sup>. Knowledge and power are thus indistinguishable to relativize the idea of wealth. The political mechanism reveals two points: this enlightened optimism that territory alone does not invalidate the growth of wealth; the ways through which the application of an empirical “method”, of a political mechanism, produces and changes realities that seem fatalistically determined forever and ever.

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<sup>290</sup> Lisboa, National Library of Portugal (BNP), Coleção Pombalina, codex 686, Sebastião José de Carvalho e Melo, “Mecanismo político no qual se oferece à mocidade portuguesa uma suficiente instrução sobre os interesses do Estado (no que pertence ao comércio e a agricultura), cujos princípios se reduzem a termos práticos e mecânicos”, s.d.

<sup>291</sup> Michel Foucault, *Op. Cit.*

<sup>292</sup> Lisboa, National Library of Portugal (BNP), Coleção Pombalina, codex 686, Sebastião José de Carvalho e Melo, “Mecanismo político no qual se oferece à mocidade portuguesa uma suficiente instrução sobre os interesses do Estado (no que pertence ao comércio e a agricultura), cujos princípios se reduzem a termos práticos e mecânicos”, s.d.

<sup>293</sup> Michel Foucault, *Op. Cit.*, p. 116.

<sup>294</sup> Lisboa, National Library of Portugal (BNP), Coleção Pombalina, codex 686, Sebastião José de Carvalho e Melo, “Mecanismo político no qual se oferece à mocidade portuguesa uma suficiente instrução sobre os interesses do Estado (no que pertence ao comércio e a agricultura), cujos princípios se reduzem a termos práticos e mecânicos”, s.d.

<sup>295</sup> *Id., Ibid.* (translated).

It is therefore not surprising that *Political Mechanism* is entirely focused on the first chapter of Petty's *Political Arithmetick*, as evidenced by the numerous references contained in its brief pages<sup>296</sup>. The first chapter of Petty's *Political Arithmetick*, as the subtitle itself indicates, essentially demonstrates how the territorial smallness of a state does not preclude its enrichment. Wealth depends on variables such as population, arable land, maritime trade, religion, and the fight against laxity and laziness at work - recurring element in political arithmetic and in the preface of *Political Mechanism*. The first chapter of *Political Arithmetick* is, therefore, an exposition of how wealth is relatively and entirely dependent on a quantifying rationality of reality rather than on a supposed transcendental supremacy. When comparing the Dutch with the rest of the people, Petty emphasizes their wealth as a product of the country's earthly situation:

Many Writing on this Subject do so magnifie the Hollanders as if they were more, and all other Nations less than Men (as to the matters of Trade and Policy) making them Angels, and others Fools, Brutes, and Sots, as to those particulars; whereas I take the Foundation of their achievements to lie originally in the Situation of the Country, whereby they do things inimitable by others, and have advantages whereof others are incapable<sup>297</sup>.

This relativization of earthly wealth is based on a game of equivalences and comparisons amongst quantities, goods, lands, buildings, among other variables. This equivalence generates the "the country's situation". It is not surprising that Petty introduces his first chapter with the example of how an acre of land can correspond to 20 in terms of wheat produced<sup>298</sup>. This "mechanism" of rationalization of the goods that exist in the territory follows a centrifugal logic which causes the generation and expansion of increasingly larger "circuits" to quantify and equate the variables that boost governance advantages<sup>299</sup>. Consequently, the central axis of the mechanism is the population rather than the prince's power<sup>300</sup>. Pombal's handwritten autograph, despite being a sketch of a potential treatise of pedagogical nature, is a clear example of this paradigmatic difference that defines the birth of security and, by extension, the creation of a Portuguese commercial state.

Given that *Political Mechanism* references most paragraphs from Petty's first chapter, one can claim that Pombal is particularly interested in converting them into a series of

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<sup>296</sup> It should be noted that Pombal was most likely based on a French translation of *Political Arithmetick* (*ref*) that he commissioned, given that the references coincide with the numbering of the paragraphs in the translated text.

<sup>297</sup> William Petty, *The Economic Writings of Sir William Petty: Together with the Observations upon the Bills of Mortality, more probably by Captain John Graunt*, vol. 1, Cambridge, Cambridge University Press, 1899.

<sup>298</sup> *Id., Ibid.*

<sup>299</sup> Michel Foucault, *Op. Cit.*, p. 45 (translated)

<sup>300</sup> *Id., Op. Cit.*

ground “rules” to transform Portugal into a commercial State based on the economic rationalization of its resources. The “first rule” of its *Political Mechanism* is then underpinned by the key idea in paragraph 19 from the first chapter of *Political Arithmetick*, cited above. That is, the need to privilege the “situation of the Country” (Holland) to the detriment of an a-priori divinization of its resources. Henceforth, Pombal clearly refers to the second point of the 20<sup>th</sup> paragraph in *Political Arithmetick*, in which Petty demonstrates how the Dutch territorial smallness turns out to be an advantage in terms of optimizing available resources. This even leads Pombal to refer to how the “smallness of a country requires fewer churches”. Therefore, this rule suggests that resources should be adapted and optimized – including places of worship – as much as possible according to the “extent of the country”. Nothing, not even faith, must remain untouched by the quantifying rationalization of territory and population.

The second rule Pombal enunciates in *Political Mechanism*<sup>301</sup> concerns the importance of using the machine in the production of wealth. In this rule, Pombal elaborates a curious reasoning according to which the machine must “suppress” (the verb that Pombal utilizes in the manuscript) the “people’s flaw”. The statement here, always in light of Petty, is no less than one of the basic premises of the later-emergent political economy: not only does the machine allow the work of “a thousand men”, it also reduces expenses with tillage work. However, for this to happen, it is necessary to “seize the advantages of sites” and adjust the “water machines”, such as the Dutch “mills” to territorial reality. Once again, this rule highlights the intrinsic relation between territory and population variables. The mechanization of resources and human labor is another way of taking “advantages” that favor a small country. Such work mechanization, nonetheless, still depends on the “people” (even if they are *defective* when compared to the speed of the machine).

The fourth rule of *Political Mechanism* then approaches how the “naturals of the country” should be employed in “more profitable jobs”. The same rule refers to paragraph 23 of *Political Arithmetick*, in which Petty alludes to the division of labor. Ergo, gains are greater in commerce alone when compared to manufactures, but the latter profits more than the tillage. Yet the organization and hierarchy of work are dependent on the characteristics of the territory. This explains why, for Petty, Holland makes the rivers the organizing axis of the Dutch working life and, consequently, a source of wealth because farming is rich in the lands around the rivers and manufacturing is easily expedited throughout the world through maritime trade. Pombal seems to reinforce this reasoning by referring to

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<sup>301</sup> Lisboa, National Library of Portugal (BNP), Coleção Pombalina, codex 686, Sebastião José de Carvalho e Melo, “Mecanismo político no qual se oferece à mocidade portuguesa uma suficiente instrução sobre os interesses do Estado (no que pertence ao comércio e a agricultura), cujos princípios se reduzem a termos práticos e mecânicos”, s.d.



paragraph 32 in this rule, which describes various manufacturing “specialties” from several countries, including Portugal.

From the fifth to the ninth rules of *Political Mechanism* (which correspond to paragraphs 25 to 30), Pombal focuses mainly on the importance of maritime activities to generate wealth. In Petty’s *Political Arithmetick*, much of the Dutch commercial dominance is justified on the use of maritime and geographic resources. For this purpose, they save up in human resources and in goods transportation, as well as in the valorization of “fishing” and “materials of navigation”. In the “ninth rule”, Pombal returns to the theme of the “situation”. This commandment refers to paragraphs 29 and 30, both essential for understanding the mercantile rationality underlying the first chapter of *Political Arithmetick*. The excerpt enables the establishment of parallels between the situation in Portugal and that of the Dutch power when Petty wrote his aforementioned work. Trade, therefore, depends entirely on the situation which, in the case of the Dutch, consists of being dominant in the mercantile and fishing fleet, given that the dynamics of the world market are discovered through the sea in order to explore their business potential<sup>302</sup>. In this case, “using the situation”, Pombal’s expression in the ninth rule, involves manufacturing and exporting the maximum number of goods whose raw materials come from the same places where products manufactured in Holland are now exported.

This brings us to the religious question, one of the most important aspects in *Political Arithmetick* and which is particularly relevant to how Pombal incorporates it in *Political Mechanism*. One of the central axes of the “method” of political arithmetic is the interpretation of religion as a key element to accumulate wealth. Centuries before Max Weber<sup>303</sup>, Petty establishes a fundamental link between the accumulation of wealth and the secularization of religious practices in the economic sphere. For Petty, religious heterodoxy is fundamental to economic development, as the analysis of the Dutch heterodoxy reveals. In the paragraphs concerning freedom of expression (or conscience), Petty makes a bold comparison between religion and commerce. The argument is that the driving force of commerce comes from the rejection of the Church’s infallibility and the secularization of religious belief in profane work as a “duty to God”<sup>304</sup>.

Paragraph 52 of the first chapter of *Political Arithmetick*, which Pombal refers to in point 24 of *Political Mechanism*, is a reflection on the interdependence of economic activity and the religion professed by the population. However, before this discussion, Petty establish-

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<sup>302</sup> “Those who predominate in Shipping, and Fishing, have more occasions than others to frequent all parts of the World, and to observe what is wanting or redundant everywhere, and what each People can do, and what they desire, and consequently to be the Factors, and Carriers for the whole World of Trade. Upon which ground they bring all Native Commodities to be Manufactured at home, and carry the same back, even to that Country in which they grew, all which we see” (William Petty, *Op. Cit.*, p. 13).

<sup>303</sup> Max Weber, *Op. Cit.*

<sup>304</sup> William Petty, *Op. Cit.*, p. 15.

es a causality between a people who were “oppressed”, precisely because they were tolerant from a religious point of view, and their rise to commercial power. The oppression of a religious nature suffered by the Dutch had to be compensated with the fight against “laziness”, which, in turn, is overcome with the total monetization of bodies: “[This People] must punish the Lazy by Labor, and not by crippling them”<sup>305</sup>. This form of punishment is justified in the light of the quantifying matrix that encompasses everything in the arithmetical project of the commercial State. Religious heterodoxy, which Petty merges with freedom of conscience, thus opened the door to the metaphysics of social calculation. Therefore, the religious worldview that Petty defends as a basis for the enrichment of a people is itself the generator of another sacralizing worldview based on the quantification of reality.

It is precisely here that the problematization of security is founded. Rather than a secular field that organizes the commercial state, it is a theological worldview that conceives of a temporality that is radically different from pre-modern social formations<sup>306</sup>. When the quantification of social processes, illustrated in theories such as Petty’s political arithmetic, became a fundamental axis of the governmentalization of the modern State, human finitude began to be conceived in the empirical immanence of the calculation of “advantages” a State must take of its territory and population. Security comes to generate not a disenchanting form of theological times but a sacralizing form of eschatology<sup>307</sup>. Simply put, the theological event of the end time is transferred to the “factual finitude” of earthly beings<sup>308</sup>. Nonetheless, the factual finitude of security should not be understood as a merely terminal horizon, rather, it refers to infinite possibilities for the reappearance of “finitudes”<sup>309</sup>. Security is then manifested in the permanent tension between a horizon of finitude and the prevention of that end<sup>310</sup>. While Petty’s work values the heterodoxy of religion as a motive for the enrichment of the commercial State in the emerging discourse of security, the valorization of an emerging orthodoxy that inaugurates a factual temporality is also implicit. Security appears as a metaphysical totality that reorganizes States in

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<sup>305</sup> William Petty, *Op. Cit.*, p. 14.

<sup>306</sup> Michael Dillon, *Op. Cit.*

<sup>307</sup> *Id., Ibid.*

<sup>308</sup> *Id., Ibid.*, p. 791.

<sup>309</sup> *Id., Ibid.*, p. 781.

<sup>310</sup> Considering that, one can deduce how security erupted definitively in the Portuguese territory after the 1755 earthquake. However, one of the most relevant authors to understand the discursive continuity of Christian eschatology, Jacob Taubes (*Occidental Eschatology*, Stanford, CA, Stanford University Press, 2009), notably considers the Lisbon earthquake as the event that introduces eschatology into modernity. The preventive response and the urban reorganization that followed the earthquake are intrinsically linked to a catastrophic event that triggers the security dynamic between the *immanentized eschaton* and the *katechon* (Michael Dillon, *Op. Cit.*).

a game of quantifications and strategic possibilities, considering the “advantages” of the “situation”, that is, what happens in factual time.

Given Pombal’s diplomatic context in London, it is difficult to judge his position on this commercial orthodoxy in definitive terms.. His economic writings from the London period are extremely important to understand how Pombal<sup>311</sup> applies this arithmetical orthodoxy in a field of power struggle and, in doing so, reveals a certain judgment about the “greed” of the English. Pombal<sup>312</sup> is far from considering the techniques of the English, “experts in calculation” (an ironically pejorative term that appears in *Relação dos Gravames* [Report on Grievances]), as neutral and ready to be used by those who master them. The London manuscripts thus reveal a difficult negotiation between strategic knowledge, which he ends up translating to Portugal in his extensive relationships, and a clear perception that this knowledge emerges in a cultural context other than the Portuguese Crown. Unlike some authors’ evaluation on the density of Pombaline texts, the latter can be understood as situated in a permanent tension between a governing technique and a diplomat who works on disarmaments and later articulations to benefit the Portuguese State. He, therefore, uses the enemy’s knowledge and translates it into a distinct cultural reality. Such cultural differences are part of a logic of power that Pombal does not shy away from judging in *Relação dos Gravames* [Report on Grievances] as an observer of English customs in 17<sup>th</sup>-century London:

The English imagines, by innate prevention, that he was born to be lord of the heads of the world; that it is necessary to be a Briton (as they say) to be skilled and capable of possessing riches; that, consequently, those possessed by any other nation are usurped from them; that, when they vex a foreigner in order to extort his money or deprive him of the profit he should make, this is not a robbery they commit, but a claim, because they take away what belongs to them... When any man from another nation appears here to exercise a ruse or an interest, the small people openly insult him with curses and sometimes with stones, rudely telling him to go back to his country because this one does not belong to him. The politest people vex him with objections and with projects, so that he finds ruin where he came to seek his interest<sup>313</sup>.

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<sup>311</sup> Sebastião José de Carvalho e Melo, *Op. Cit.*, 1986.

<sup>312</sup> *Id., Ibid.*, p. 48.

<sup>313</sup> *Id., Ibid.*, p. 52. “O Inglez imagina por prevenção innata que nasceo para ser senhor dos cabedaes do mundo; que he necessario ser Bretão (como eles dizem) para ser habil e capaz de possuhir riquezas; que por consequencia lhes andam uzurpadas aquellas que possuhe qualquer outra nação; que quando vexão a hum estrangeiro para lhe extorquirem o cabedal ou lhe devirtirem o lucro que deveria ter, não he isto hum roubo que cometem, mas huma reivindicação, porque se ristuem do que lhes pertencia ... Quando aqui aparece qualquer homem de outra nação para exercitar hum artificio ou fazer hum interesse, o povo miudo descubertamente o insulta com maldições e às vezes com pedras, dizendolhe grosseiramente que

It is necessary to contextualize these general remarks about the “English” in the context of the commercial dispute between the two sovereign states and which Pombal considered to be tainted from the start by the English side. Pombal’s arguments in London’s diplomatic affairs depend, in part, on the negative construction of the British identity to support the thesis that the British government ignores the various treaties that govern commercial relations between the two states. Yet there is another more relevant aspect that underlies his argument and has to do with his claim on the search for money, that is, the attempt to understand how wealth is produced. In fact, Pombal ends up *unveiling* the political arithmetic through his empirical observations and the respective study of the “mechanism” of the apparently irrational dynamics of the world market. This is how, even in *Relação dos Gravames* [Report on Grievances], one can find sharp observations on the logistics of the London port, which Pombal<sup>314</sup> describes to exemplify the difficulties Portuguese ships and traders faced to succeed in it.

If Pombal studies the mechanism of world trade from one of its nerve centers, London, this is because he understands it within a political dynamic of power struggle with England. What Pombal’s reports sent to Lisbon indicate is precisely an argumentative effort to highlight both techniques to manage and take “advantages” of a commercial situation and how they are essential and constitutive of governance<sup>315</sup>. The economic writings of 1741-1742<sup>316</sup> thus show that the dispute between the two states is entirely subsumed in ports and commercial fluctuations, in insurance, in the calculation of the risk of investments in mercantile crossings, in debt management as a *political mechanism*, and in the productive capacity of populations. All this disruption recalls one of the basic principles of security, that is, the change in the very conception of territory: it does not depend only on a sovereignty based on the power of the State over its subjects, but also on the value that it acquires in relation to the population. This knot between territory and population – security – clearly appears in London’s writings, coming from both Pombal’s “natural” observations and his relations with central figures in British governance, among which Prime Minister Walpole stands out<sup>317</sup>.

Ergo, Pombal’s London observations present this pedagogical aspect of describing customs and ways of acting that emerge from the commercial relations that unfold in the city. What we have in Pombal’s description of the “English” is, above all, a construction of an identity based exclusively on commerce and economy as a whole and not so much

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vá para a sua patria, que esta lhe não he pertencente. As gentes mais polidas o vexão com objeções e com projectos, para que encontre a ruina onde vinha buscar o interesse” (translated).

<sup>314</sup> Sebastião José de Carvalho e Melo, *Op. Cit.*, 1986.

<sup>315</sup> Michel Foucault, *Op. Cit.*, 1986.

<sup>316</sup> Sebastião José de Carvalho e Melo, *Op. Cit.*

<sup>317</sup> Pedro Sena-Lino, *Op. Cit.*

on territorial possessions. When reporting the behavior of the “experts in calculation”<sup>318</sup> to Portugal, Pombal is also talking about the dominant business style. The text<sup>319</sup>, along with the remaining economic manuscripts, is, therefore, much more than mere reports of an envoy of the Portuguese government residing in London. Especially in the *Relação dos Gravames* [Report on Grievances]<sup>320</sup>, there is clearly a brief introduction to world trade according to which it is important to know the rules that govern trade. These regulations are both inferred through field observation and through the arithmetic calculation of the value of goods that are not innocent, as Pombal was well aware of, given Portugal’s “disadvantages” compared to England’s advantages.

However, the increasing governmentalization of power in both states does not imply the cessation of conflict between two sovereign territories. The *Relação dos Gravames* [Report on Grievances] shows, in this regard, the limits of the much-heralded freedom of commerce that would supposedly come from a religious heterodoxy. By pedagogically describing how the disadvantages of Portugal and the advantages of England unfold, Pombal is precisely deconstructing the supposed freedom of trade between both States. As Pombal clarifies throughout the report, freedom of trade ends when “Acts of Parliament” contrary to the treaties are approved.

Despite its discursive relevance, the *Relação dos Gravames* [Report on Grievances] sinned only because it did not have enough echo in the Portuguese government<sup>321</sup>. The report thus falls into oblivion<sup>322</sup>. Whether due to political pragmatism, with rules George II and the English parliament dictate in the Anglo-Portuguese commercial relationship, or due to a genuine inability to understand the rationality of world trade, the epistemological importance of this text was reduced to a minimum.

Some of these London details are provided in Sena-Lino’s recent biography (2020), which is particularly relevant to understanding the London context after the report was written. The sequence of the biographical narrative surreptitiously shows how the study of commercial relations between Portugal and England allowed the future Marquis of Pombal to uncover the subterfuges and commercial tactics of the English government when it comes to trade with Portugal. The grievances the English commit are now proven and explained by Pombal. Moreover, this biography reveals that he was going to challenge Walpole, whose power declined after his resignation from the government, and the Duke of Newcastle in a diplomatic dispute in the first months of 1742<sup>323</sup>. In this phase of

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<sup>318</sup> Sebastião José de Carvalho e Melo, *Op. Cit.*, p. 48.

<sup>319</sup> Sebastião José de Carvalho e Melo, *Op. Cit.*, 1986.

<sup>320</sup> *Id., Ibid.*

<sup>321</sup> Pedro Sena-Lino, *Op. Cit.*

<sup>322</sup> *Id., Ibid.*

<sup>323</sup> *Id., Ibid.*

power transition in England, Pombal met with the resigning Robert Walpole and confronted him with the possibility of closing Portuguese ports to English ships if the treaties continued to be disrespected by the English<sup>324</sup>. The background of the threat was the power struggle between Walpole and Newcastle, who was preparing to ascend to the position of prime minister. Walpole ended up using the conflict to denigrate Newcastle<sup>325</sup>. Although external factors mitigated the threat, Sena-Lino concludes that Pombal had managed to reposition the Anglo-Portuguese alliance at that moment.

However, the paradoxical and melancholic situation of Pombal must be taken into account. It reveals a difficult cultural readjustment between the court of D. João V and the hegemony of commercial rationalities and dynamics that Pombal observed in London. Pombal had written a text such as the above-mentioned report to reveal the Portuguese State's misunderstanding of the prevailing rationalities and techniques in world trade. Meanwhile, as Sena-Lino<sup>326</sup> states, D. João V was rather concerned with allowing the free rein of his Catholic religiosity, ordering the construction of a chapel adjacent to the London Embassy around 1743. However, the embassy was still under financial pressure due to the meager and late payments of the Portuguese State, and Pombal was forced to sell his uncle's library to meet current expenses<sup>327</sup>. In this sense, Sena-Lino<sup>328</sup> conjectures that all these difficulties, in addition to the dispute with the Duke of Newcastle, led Pombal to fall ill due to nervous exhaustion. In successive letters sent to Lisbon, Pombal reveals his precarious state of health and asks the Portuguese monarch to authorize his return to Portugal<sup>329</sup>. Then, on May 28, 1743, Pombal returned to Lisbon<sup>330</sup>. He goes back to London again on January 8, 1745, when he accounts for other duties related to taxes on Portuguese wines<sup>331</sup>. Nonetheless, he leaves the British capital for good on May 25<sup>332</sup>.

One can hardly judge the impact of Pombal's stay in London in the 18<sup>th</sup> century, which, even so, leads commentators to see this period in the light of a conceptual map very dependent on the mere commercial conflict between two very unequal States in military terms. In fact, this text sought to show that this conflict is related to equally important background aspects regarding the power reconfiguration in light of the security problematization. Pombal's stay in London thus appears to be much more than a mere isolated

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<sup>324</sup> *Id., Ibid.*

<sup>325</sup> *Id., Ibid.*

<sup>326</sup> *Id., Ibid.*

<sup>327</sup> *Id., Ibid.*

<sup>328</sup> *Id., Ibid.*

<sup>329</sup> *Id., Ibid.*

<sup>330</sup> *Id., Ibid.*

<sup>331</sup> *Id., Ibid.*

<sup>332</sup> *Id., Ibid.*

event, but rather a key piece to understand the governmentalization of power in Portugal, in addition to how one of the central figures in this process managed and transfigured the population variable, the search for its economic value, to a territory marked by religiosities and a state apparatus very different from the British one. The discourse of security present in Pombal's manuscripts is, therefore, obscured if only an apologetic interpretation of his texts is preserved, very dependent on the idea of progress and Enlightenment ideals that tends to represent Pombal as a figure of rupture with the nobility, the clergy, and British interests<sup>333</sup>. However, the censorship of British empiricism basic texts and the power centralization in the high nobility, which Pombal does not fail to value, show rather a figure of continuity<sup>334</sup>. Guided by the belief that the mere governmentalization of power would be enough for the commercial game, Pombal could not resolve the intrinsic dependence between freedom of commerce and freedom of conscience, very much indebted to the British revolutions of 1640 and 1688. However, it is necessary to point out that, both in *Political Mechanism* and in the central economic policy text of the 1700s, *Relação dos Gravames* [Report on Grievances], the possibility of changing the unfavorable *situation* of one of the parties is always open-ended. The factic temporality generated by security and its countless wealth-producing apparatuses clashes with any economic or territorial fatalism.

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<sup>333</sup> *Id., Ibid.*

<sup>334</sup> *Id., Ibid.*

# THE PERCEPTION OF THE MARQUIS OF POMBAL IN ENLIGHTENMENT GERMANY

CHRISTINE VOGEL<sup>335</sup>

## INTRODUCTION

In the late 18<sup>th</sup> century, the cathedral school in Güstrow was the most important school in the Duchy of Mecklenburg, a territory on the German Baltic coast. It went back to a medieval foundation and is thus today considered one of the oldest schools in the German-speaking world. In the course of the Reformation of the 16<sup>th</sup> century, the Lutheran Mecklenburg dukes secularised the school, re-founded it as a state Latin school and sponsored a new school building which was completed in 1579 and still exists today.

In September 1796, pupils and teachers of the school, presumably together with dignitaries of the city and the duchy, were gathered for the annual graduation ceremony. And as every year, a pupil of the Gymnasium gave a speech on the occasion. This time the pupil, a certain Carl Wiggers, began by reflecting on the connection between innate talent and education, and then put forward the thesis that most great men who have

acquired the fame of a great man and an immortal name by brilliant merits among whole nations and among the human race, were born in obscurity or yet were formed to this end by dangers and difficulties and by harsh treatment in the years of youth<sup>336</sup>.

This, he continued, could be proved by numerous examples in history:

Thus was a Cyrus educated, thus was a Marius educated, thus was a Caesar educated, thus was a Frederick [the Great], the ornament of the human race, made acquainted in early life with the danger of life, and forced by his father's severity in solitude to useful preparations for his great life. In this way the greatest teachers of the human race were formed, in this way the greatest statesmen were formed.

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<sup>335</sup> University of Vechta, Germany.

<sup>336</sup> „[Die] Meisten, welche sich durch glänzende Verdienste unter ganzen Völkern und unter dem Menschengeschlechte den Ruhm eines Großen und einen unsterblichen Namen erworben, in der Dunkelheit geboren oder doch durch Gefahren und Schwierigkeiten und durch eine harte Behandlung in den Jahren der Jugend dazu gebildet wurden“. Sample essays by the high school graduates Behm, Wiggers, Hopp and Hoekh, Michaelmas 1804 [Probeaufsätze der Abiturienten Behm, Wiggers, Hopp u. Hoekh, Michaelis 1804]: Rostock University Library: Num. 1: R 91 a, pp. 3-4. All translations are by the author. I would like to thank Sophie Große for pointing out this source.



In this way Portugal also received the greatest man it has produced, and one of the greatest ministers Europe admires, who, on the throne, would perhaps have brought his fatherland out of its inglorious darkness and restored it to its former glory. It is the Marquis of Pombal of whom I speak. A man who rightly deserves the name of the Great [...]<sup>337</sup>.

The rest of his speech, the text of which is now kept in the manuscript collection of the Rostock University Library under the heading “Character Study of the Marquis Pombal” (*Characterstudie des Marquis Pombal*), then deals with the life, merits and also the faults and personal weaknesses of the Marquis of Pombal.

The existence of this document throws a special spotlight on the topic of my paper, namely on the question of the perceptions of Pombal in the German-speaking world in the phase of the late Enlightenment. Why did a student in northern Germany in 1796 choose the Marquis of Pombal, of all people, as the subject of his graduation speech? Wouldn't it have been much more appropriate to deal with Frederick the Great, for example, the Prussian king he compared Pombal to and whose 10<sup>th</sup> anniversary of death was celebrated in 1796? Or any one of the new heroes of the ongoing French Revolution?

The very existence of the document proves that the Marquis of Pombal occupied a special place in the perception of Germans at the end of the 18<sup>th</sup> century – presumably such a high place as he would never attain again. In any case, I can report from roughly two decades of teaching at German universities that nowadays the Marquis of Pombal is no longer part of general knowledge in Germany, not even among students of history. At the end of the 18<sup>th</sup> century, however, it seems to have been quite different.

The questions I would like to explore in the following are: What could young Carl Wiggers, a student in a small city in a minor territory of the Holy Roman Empire, possibly know about Pombal at the end of the 18<sup>th</sup> century? Where did his knowledge come from? What picture of Pombal did he draw on the basis of this knowledge? And is this image representative of the general perception of Pombal in the German-speaking world at that time?

Of course, it could be that Carl Wiggers had his knowledge from his school books or that the Marquis of Pombal was discussed in class. Nevertheless, we can probably assume

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<sup>337</sup> „So wurde ein Cyrus gebildet, so wurde ein Marius, so wurde ein Cäsar erzogen, so wurde ein Friedrich die Zierde des Menschengeschlechts, schon in den frühen Jahren mit der Gefahr des Lebens vertraut gemacht, und durch die Strenge des Vaters in der Einsamkeit zu nützlichen Vorbereitungen auf sein großes Leben gezwungen. So wurden die größten Lehrer des Menschengeschlechts, so wurden die größten Staatsmänner gebildet. Auf diesem Wege erhielt auch Portugal den größten Mann, den es hervorgebracht, und einen der größten Minister, die Europa bewundert, welcher auf dem Thron sein Vaterland vielleicht aus seiner unrühmlichen Dunkelheit ganz hervorgezogen, und seinen ehemaligen Glanz widerhergestellt haben würde. Der Marquis Pombal ist es von dem ich rede. Ein Mann der mit Recht den Namen des Großen verdient [...]“, *Id., Ibid.*, p. 4.

that on such an occasion the goal was not simply to reproduce a regular subject matter, but rather that Carl Wiggers wanted to demonstrate not only his rhetorical skills as an orator, but also his own general political education and informedness.

Then, as now, people's knowledge of political current affairs came first and foremost from the news media, and at that time that meant above all: from the periodical press, but also from non-periodical publications, i.e. treatises, pamphlets, etc. In order to answer the questions I have just outlined, I will therefore first make some general remarks on the German-language press landscape in the second half of the 18<sup>th</sup> century. Then I will analyse the press coverage of Pombal from his deposition to his death, i.e. from 1777 to 1782. Against this background I will examine the most important controversial writings and treatises on Pombal that were discussed in Germany in the last quarter of the 18<sup>th</sup> century. Finally, I will return once again to the speech of the high school student Carl Wiggers in order to work out how his study of Pombal's character relates to contemporary media discourses.

## THE GERMAN PRESS LANDSCAPE AT THE END OF THE 18<sup>TH</sup> CENTURY

The Holy Roman Empire was a political entity that cannot be adequately described with the categories of modern statehood. Unlike Portugal or France, for example, it was not an early modern nation state, not a unitary monarchy. But it was also not a confederation of states, because the individual members of the Empire were not sovereign powers in the sense of international law, but were bound together as "imperial estates" (*Reichsstände*) under a common head, the emperor. The princes and other estates of the Empire were bound to the emperor by a personal relationship of allegiance. In return, they received political participation rights: the emperor and the imperial estates met at the imperial diet (*Reichstag*) to discuss the affairs of the Empire and to bring about decisions. Thus, contrary to what modern historical maps with their clearly delineated coloured fields and multi-coloured borderlines suggest, the Empire was, as the historian Barbara Stollberg-Rilinger recently put it, "not a closed territory with fixed borders; it had no sovereign supreme power, did not have a central executive, a bureaucracy, a standing army, etc. – in other words, it lacked almost everything of what characterises modern statehood"<sup>338</sup>.

The consequence of this special yet also typically pre-modern political order was diversity: diversity of forms of government, diversity of legal systems and administrative

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<sup>338</sup> „[Das Reich war] kein geschlossenes Territorium mit festen Grenzen; es besaß keine souveräne höchste Gewalt, verfügte nicht über eine zentrale Exekutive, eine Bürokratie, ein stehendes Heer usw. – mit anderen Worten, ihm fehlte fast alles von dem, was moderne Staatlichkeit kennzeichnet“, Barbara Stollberg-Rilinger, *Das Heilige Römische Reich Deutscher Nation. Vom Ende des Mittelalters bis 1806*, München, Beck, 2009, p. 7.

practices in the individual territories of the Empire, but also a very diversified media landscape that was unique in this period: nowhere else in Europe were there so many different newspapers and magazines.

In the late 17<sup>th</sup> century, there were already 60 to 80 different newspapers in the German-speaking world with an average circulation of 350 to 400 copies. If one takes into account the collective reading practices of the time, one can therefore already assume a large and diverse media public: It was not only the courts and diplomats who read newspapers, but increasingly also bourgeois classes. In the second half of the 18<sup>th</sup> century, the number of newspaper titles had already multiplied: research assumes that there were up to 250 different newspaper enterprises in the German-speaking world with a total circulation of more than 300,000 copies. Not every one of these businesses was long-lived, some titles only existed for a few years, others – under a different title – still exist today. On the whole, however, it remains the case that there was a decidedly rich and varied range of information media for the emerging political public.

If we take another look at the map of the Holy Roman Empire, another peculiarity of the German-language media landscape of this time becomes clear: the de facto ineffectiveness of censorship. Censorship existed, of course, at the level of the individual territories of the Empire, but it was exercised with varying degrees of severity and could de facto already be undermined by the fact that the nearest territorial border was never very far away and that the power of the state censorship authorities then also ended at this border. Ecclesiastical censorship was also only effective within the respective territories – due to the confessional diversity in the Holy Roman Empire, books that were on the Roman Index could be printed and distributed without any problems in many places and thus also reach Catholic territories. This is a decisive difference to France or Portugal, for example, where the *Gazette de France* and the *Gazeta di Lisboa* held a quasi-monopoly position and were at the same time subject to very tight state censorship. The same was true, for example, of the *Wienerisches Diarium* published in Vienna, the Habsburg capital, or of the newspaper published in Berlin, the capital of Brandenburg-Prussia. But none of these newspapers had a truly comparable monopoly.

And then there were the free imperial cities such as Nuremberg, Augsburg, Frankfurt, Cologne or Hamburg, which were largely autonomous as cultural and economic centres, had their own jurisdiction and were often important information hubs at the same time. With the exception of Catholic Cologne and bi-confessional Augsburg, these imperial cities were Protestant in character, and almost every imperial city housed its own newspaper. The most important German-language newspaper in the Protestant North German region was the *Hamburgische Unpartheyische Correspondent*, which in the last quarter of the 18<sup>th</sup> century already had the enormous circulation of 21,000 copies and was thus also very widely distributed outside Hamburg. The success of this newspaper was also

based on the fact that it was effectively not subject to censorship and already advertised its own impartiality in the title – a clever marketing technique. For the Catholic Habsburg Empire, on the other hand, the *Wienerisches Diarium*, which had a high circulation but was subject to strict censorship, was particularly important. In addition, larger newspapers of national importance were printed at important postal hubs or trade fair cities such as Frankfurt and Leipzig.

The German newspapers had correspondents in Lisbon and reported regularly from Portugal and its colonies.<sup>339</sup> In addition to the usual reporting on diplomatic and dynastic events at court and on war events, the newspapers naturally paid special attention to extraordinary events. In the case of Portugal, in the second half of the 18<sup>th</sup> century, this was not only the great earthquake of 1755, but above all the assassination of King Joseph I and the subsequent drastic measures taken by his minister Sebastião José, later Marquis of Pombal. The execution of the Duke of Aveiro and the members of the Távora family as well as the ban and expulsion of the Jesuits from Portugal and its colonies dominated German media coverage for many months from January 1759. As I have elaborated elsewhere, a clear division of the German press and public along confessional lines can already be observed at this time: While newspapers in Catholic territories almost stopped reporting on the assassination the moment the Jesuits were dragged into the affair, Protestant newspapers intensified their coverage, quoting extensively from the numerous writings published on Pombal's behalf, which were soon to be read all over Europe.<sup>340</sup> Since the Protestant newspapers outnumbered the Catholic ones in terms of numbers and circulation, they dominated the public perception of Pombal's reign.

Newspapers, however, were not the only periodical media that shaped the public perception of Portugal and Pombal in Germany. Journals and magazines were also particularly important for the emergence and self-assertion of a bourgeois enlightened public sphere, especially in the last third of the 18<sup>th</sup> century. They appeared less frequently than newspapers, sometimes once a week, sometimes only once a quarter. Magazines usually had a special thematic focus and a particular target group; from the beginning of the 18<sup>th</sup> century there were, for example, already moral weeklies specifically aimed at women.

The market for magazines literally exploded in Germany from the middle of the 18<sup>th</sup> century onwards: while there were only about 58 new journals founded before 1700, there were already more than 300 in the decade from 1751 to 1760 and even more than 1000 in the decade before the French Revolution.

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<sup>339</sup> To be precise, only major newspapers maintained their own correspondents – many newspapers then copied their coverage from the larger papers.

<sup>340</sup> Christine Vogel, *Der Untergang der Gesellschaft Jesu als europäisches Medienereignis*, Mainz, Zabern, 2006, pp. 50-75.

Scholarship on the literary market has observed that in the last third of the 18th century, the proportion of literary journals remained more or less constant, while political and Enlightenment journals increased significantly and the proportion of scientific titles declined - all these are indications of a clear politicisation of the public sphere in this period.

If one then turns to individual journals in detail, one will also find that literary journals, which often contained mainly reviews, definitely had a political character as well. This becomes clear in particular when one looks at how books about Pombal were reviewed. Thus, through the review journals of the Age of Enlightenment, we also get a good overview of which publications on Pombal and Portugal appeared at all in the German-speaking world during this period and how they were discussed in different parts of the public - for example, among the self-proclaimed enlightened Protestant-Prussian elite.

### GERMAN-LANGUAGE PRESS COVERAGE OF POMBAL'S DEPOSITION AND DEATH (1777 TO 1782)

News of the death of King Joseph I reached the German public in April 1777 and, for a long time, once again drew the attention of newspaper readers to the Kingdom of Portugal and to the minister Pombal, who had been so powerful up to that point, but who, as is well known, was immediately deposed with the accession of Dona Maria I to the throne. His fate and the evaluation of his reign now became an intensively discussed topic in the German press.

The *Wienerisches Diarium*, for example, opened its issue of April 16, 1777 with an unusually extensive article for the time on Pombal, whose life is characterised as "an instructive example of the impermanence of fortune"<sup>341</sup>. The newspaper first reported on Pombal's origins and education, then devoted itself in detail to his time as a diplomat at the Viennese court and his marriage to the Austrian Countess Maria Leonor von Daun, which was initially perceived as not befitting his station - a topic that presumably met with particular interest among the readership of the Viennese newspaper. Finally, the article described Pombal's rise to the highest power in the state and the most important events of his tenure. The article praises Pombal as an extraordinary statesman who would go down in world history and who had made Portugal a powerful and independent kingdom through his reforms - much to the chagrin of the Papal Church and England<sup>342</sup>. At the same time, however, it is also mentioned how much the minister polarised everyone: "People want to blame him for having administered the state as a despotic viceroy and for having amassed immeasurable wealth. If this is true, then for the thinking philosopher

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<sup>341</sup> „[E]in lehrreiches Beispiel von der Unbeständigkeit des Glücks“, *Wienerisches Diarium* (henceforth WD) (16/04/1777), 1.

<sup>342</sup> WD (16/04/1777), 2.

it is only one more proof that the character of man consists of good and bad qualities according to their various gradations and shades”<sup>343</sup>.

A similarly ambivalent picture was painted by other German-language newspapers. Almost everywhere, Pombal’s services to his fatherland were emphasised. At the same time, it was reported that now, after his removal from power, countless invective pamphlets against him were spreading. Moreover, the people of Lisbon were in an uproar, had tried to storm the minister’s Lisbon residence and had thrown dirt and excrement at a medal with his portrait on the base of the new equestrian statue of Joseph I on the *Praço do Comércio*<sup>344</sup>. The Bayreuth newspaper even circulated the rumour that Pombal had absconded from Portugal with all his riches and had gone into hiding in an unknown place<sup>345</sup>.

The news about the release of hundreds of prisoners from Portuguese jails at the behest of the Queen Mary also raised expectations that a review of the infamous Tavora trial of 1758 and 1759 would soon take place. It was expected that not only the nobles convicted at the time would be rehabilitated, but also the Portuguese Jesuits, which at the same time necessarily had to go hand in hand with a trial against the ex-minister for abuse of power. The *Gazette de Cologne* positioned itself particularly harshly against Pombal in those years. The newspaper, which had been published in French in Cologne since 1734, was not only Catholic, but also avowedly pro-Jesuit. Its tirades against Pombal were regularly quoted in the German-language newspapers, though usually with a critical undertone and accompanied by the mocking remark that the newspaper writer received his information directly from former members of the Jesuit order<sup>346</sup>.

When the trial of Pombal was actually opened in October 1779, German newspapers again followed its course with interest from week to week, as well as the fluctuating state of health of the aged ex-minister, about whose approaching death there was repeated speculation. In June 1680, the rumour spread that Pombal had made an extensive confession in anticipation of his imminent death, which the Queen immediately presented to the pope because it allegedly proved, among other things, the total innocence of the

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<sup>343</sup> „Man will ihm Schuld geben, daß er den Staat als ein despotischer Vezier verwaltet, und unermessne Reichthümer zusammengeschartt habe. Wenn dieses wahr ist, so ist es für den denkenden Philosophen nur ein Beweis mehr, daß der Karakter der Menschen aus guten und schlimmen Eigenschaften nach ihren verschiedenen Abstufungen, und Schattierungen bestehe“. WD (16/04/1777), 2-3.

<sup>344</sup> WD (16/04/1777), 3; Bayreuther Zeitung (henceforth BZ) (15/04/1777), 1-2, and (29/05/1777), 6; Neue europäische Zeitung (01/04/1777), 2.

<sup>345</sup> BZ (22.04.1777), 4; BZ (29.05.1777), 5.

<sup>346</sup> For example, in the Bayreuther Zeitung and in the particularly radically enlightened Erlanger Real-Zeitung.

Jesuits<sup>347</sup>. It soon became clear, however, that no such document existed. On the other hand, in the spring of 1781, some Catholic newspapers printed the German translation of a petition from the Portuguese ex-Jesuits to the Queen, asking for an investigation into their trial so that their innocence, like that of the nobles, could be proven<sup>348</sup>. In May 1781, the German public then awaited - again in vain - the publication of the evidence that had led to the revision of the Tavora trial<sup>349</sup>. Instead, in October, the newspapers were able to print an edict from Queen Maria in which she declared Pombal guilty of various serious crimes and sentenced him to death, but at the same time suspended the sentence because of his age and infirmities<sup>350</sup>. With the news of Pombal's death and the Queen's pardons for his widow, the subject of Pombal gradually came to an end for the German news press in the summer of 1782<sup>351</sup>.

## POMBAL IN GERMAN-LANGUAGE PUBLICATIONS IN THE LAST QUARTER OF THE 18<sup>TH</sup> CENTURY

Outside the daily press, however, the controversy about Pombal and his reign only really began now. The question as to which pamphlets and treatises were read in the German-speaking world on this topic in the last quarter of the 18<sup>th</sup> century can, as mentioned, best be answered on the basis of the review journals of the period. Among the most widely circulated and influential review organs for German-language literature were the *Allgemeine Literatur-Zeitung*, published in Jena since 1785, which counted Goethe, Schiller, Kant and Alexander von Humboldt among its contributors, as well as the *Allgemeine Deutsche Bibliothek*, published in Berlin and Stettin by the radical Enlightenment author Friedrich Nicolai as early as 1765. However, a keyword search on "Pombal" in the full-text digitalisates of both journals turns out to be sobering: Firstly, the number of works on Pombal reviewed at all is very manageable, namely in the single-digit range<sup>352</sup>; secondly,

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<sup>347</sup> Erlanger Real-Zeitung (09/06/1780), 371; Münchner staats- gelehrte und vermischte Nachrichten (10/06/1780), 4; Augsburgische Ordinari-Postzeitung (22/06/1780), 2-3.

<sup>348</sup> Augsburgische Ordinari-Postzeitung (06/03/1781), 3-4; Münchener staats-, gelehrte und vermischte Nachrichten (22.02.1781), 122-124.

<sup>349</sup> WD (02/07/1781), 1; und (11/07/1781), 1-2.

<sup>350</sup> WD (13/10/1781), 1; Erlanger Real-Zeitung (09/10/1781), 669; Münchener staats-, gelehrte und vermischte Nachrichten (11/10/1781), 3-4.

<sup>351</sup> Münchener staats-, gelehrte und vermischte Nachrichten (25/06/1782), 1, und (09/08/1782), 1; Augsburgische Ordinari-Postzeitung (18/06/1782), 3; und (24/06/1782), 4; WD (19/06/1782), 5-6, und (29/06/1782), 3, und (10/07/1782), 3, und (20/07/1782), 4.

<sup>352</sup> A search for "Pombal" in the full-text digitalisat of the *Allgemeine Literatur-Zeitung* yields only three hits ([https://zs.thulb.uni-jena.de/receive/jportal\\_jpjournal\\_00000005](https://zs.thulb.uni-jena.de/receive/jportal_jpjournal_00000005) [consulted online May 3, 2022]), in the full-text digitalisat of the *Allgemeine deutsche Bibliothek* only five (<http://ds.ub.uni-bielefeld.de/viewer/toc/2002572/0/> [consulted online May 3, 2022]). A search for "Pombal" in the portal "Zeitschrif-

with one - admittedly weighty - exception, they are reviews of translations from Italian, English or French. So interest in Pombal was definitely there, but it did not lead to a particularly large amount of literary activity.

The exception, the only major original German publication on Pombal, is, significantly, the two-volume *History of the Jesuits in Portugal under the state administration of the Marquis of Pombal*, published in 1787 and 1788 in the imperial city of Nuremberg<sup>353</sup>. More so than during Pombal's lifetime, his perception in Germany at this time was obviously very much linked to his Jesuit policy, and the public's real interest was in the Jesuits.

The author of the treatise was Christoph Gottlieb von Murr, a Protestant scholar and extremely proficient publicist who not only published his own journal on art history and literature between 1775 and 1788, but also published more than 200 writings on all kinds of subjects in the course of his life. He was a member of several scientific academies and learned societies and corresponded with numerous scholars and intellectuals of his time<sup>354</sup>. Murr was thus anything but an unknown quantity at the time, but had gone against the mainstream of the Enlightenment movement by 1774 at the latest, when he published a defence of the Society of Jesus in reaction to the papal suppression of the order<sup>355</sup>. Murr defended the Jesuits – paradoxically for many contemporaries and subsequent historians – precisely as a Protestant and precisely in the name of the Enlightenment, because he saw the order as an institution of scholarship that had fallen victim to papal despotism and Catholic arbitrary rule<sup>356</sup>. In the following years, he repeatedly published in his journal writings by former Jesuit missionaries, including German ex-Jesuits imprisoned in Portugal or expelled from there, whose reports, for example on conditions in Portuguese

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ten der Aufklärung" (*Journals of the Enlightenment*), which presents 196 review organs and literary journals of the Enlightenment period as full-text digital copies, also yields only 13 hits.

<sup>353</sup> Christoph Gottlieb von Murr, *Geschichte der Jesuiten in Portugal unter der Staatsverwaltung des Marquis von Pombal. Aus Handschriften und sichern Nachrichten herausgegeben und mit Anmerkungen begleitet von Christoph Gottlieb von Murr*, 2 vols., Nuremberg, Felßecker, 1787-1788.

<sup>354</sup> Cf. Peter Wolf, Protestantischer „Jesuitismus“ im Zeitalter der Aufklärung. Christoph Gottlieb von Murr (1733-1811) und die Jesuiten, in *Zeitschrift für Bayerische Landesgeschichte*, n.º 62, 1999, pp. 99-137; Christoph Nebgen, „Christoph Gottlieb von Murr: ein Protestant erhebt die Stimme gegen die Aufhebung der Gesellschaft Jesu“, *AHSI*, n.º 73, 2004, pp. 121-147; Claudia von Collani, “The German Protestant Scholar Christoph Gottlieb von Murr (1733-1811) and his Defence of the Suppressed Society of Jesus”, *AHSI*, 2016, I, pp. 43-54: [http://www.sjweb.info/arsi/wp-content/uploads/2018/03/AHSI-2016.I\\_Article-2-von-Collani.pdf](http://www.sjweb.info/arsi/wp-content/uploads/2018/03/AHSI-2016.I_Article-2-von-Collani.pdf) [consulted online May 3, 2022].

<sup>355</sup> Christoph Gottlieb Murr, der Reichsstadt Nürnberg Zollamtman, und Mitglieds des Königlichen historischen Instituts zu Göttingen, und der naturforschenden Gesellschaft in Berlin, etc., *Briefe über die Aufhebung des Jesuiter-Ordens*, s.l. 1774. There are several reprints of this work, which testify to the success of the publication, cf. *Op. Cit.*, pp. 126-128.

<sup>356</sup> Peter Wolf, *Op. Cit.*, pp. 114-119.



prisons, he printed in the original Latin<sup>357</sup>. He also hid news from Portugal in Latin under the heading “Portuguese Literature”, and he printed mocking poems on Pombal disguised as eulogies in the original Portuguese<sup>358</sup>. There is much to suggest that during these years his journal became a publication forum for former missionaries of the Jesuit order who published anonymously here<sup>359</sup>. In addition, the writings published here, including the *Historia Persecutionis Societatis Jesu in Lusitania*, presumably written by the former missionary to Brazil, Father Anselm Eckhard, may have been essential foundations for Murr’s own *History of the Jesuits in Portugal under Pombal* published in 1787 and 1788<sup>360</sup>.

The *Allgemeine Literatur-Zeitung* reviewed Murr’s work in detail shortly after the publication of the second volume in December 1788<sup>361</sup>. The reviewer summarises the content favourably and, in view of the clearly pro-Jesuit presentation, merely points out that “no other order has had so much influence and has known, through its superiors, how to govern the whole society like a machine”<sup>362</sup>. However, he comes to the conclusion that the crimes that Pombal had accused the order of were probably unprovable, and asks at the end why “all, among whom the majority were certainly innocent, [were] treated so inhumanely”<sup>363</sup>. This already indicates a thoroughly critical view of Pombal, whose image as an enlightened reformer was clearly tarnished by his unscrupulousness and brutality.

The *Allgemeine Deutsche Bibliothek* reviewed Murr’s work only after a delay of several years in 1791 and was less gracious in its judgement than its colleagues from Jena: the work was one-sided and biased, and also written in poor German<sup>364</sup>. Admittedly, this reviewer also had to concede that “the [expulsion of the] Jesuits and related Portuguese events of Pombal’s time were not initially presented by either side entirely in their natural light. But even with the help of this history, we do not arrive at a greater certainty with regard to them [...]”<sup>365</sup>.

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<sup>357</sup> Christoph Nebgen, *Op. Cit.*, pp. 129-140, with a tabular documentation of the writings of former Jesuits published by Murr in his journal.

<sup>358</sup> „Poemata encomiastica Pombaliana“, *Journal zur Kunstgeschichte und zur allgemeinen Litteratur*, n.º 9, 1780, pp. 336-344; n.º 10, 1781, pp. 145-147.

<sup>359</sup> This is the conclusion reached by Christoph Nebgen, *Op. Cit.*, pp. 143-146.

<sup>360</sup> *Id., Ibid.*, p. 145.

<sup>361</sup> *Allgemeine Literatur-Zeitung* 289a (2.12.1788), pp. 617-619.

<sup>362</sup> „[K]ein anderer Orden [hat] so viel Einfluss gehabt, und die ganze Gesellschaft, durch seine Obern, wie eine Maschine zu regieren gewusst“, *Id., Ibid.*, p. 619.

<sup>363</sup> „[W]arum wurden alle, darunter doch gewiss der größte Teil unschuldig war, so unmenschlich behandelt?“, *Id., Ibid.*, p. 619

<sup>364</sup> *Allgemeine Deutsche Bibliothek* [henceforth: ADB] Anh. 53.-86. Bd., 4. Abt. (1791), 2115-2125, ADB 100 (1791), 162-166.

<sup>365</sup> „[...] dass die Jesuitischen und verwandten Portugiesischen Begebenheiten zu Pombals Zeiten, von beyden Seiten anfänglich nicht ganz in ihrem natürlichen Lichte vorgestellt worden sind. Aber zu einer

One of the most successful works on Pombal among the German public was the multi-volume biography by Francisco Gustá, a Catalan ex-Jesuit who lived and worked in exile in Italy<sup>366</sup>. This European bestseller was originally written in Italian, but also circulated in French and Spanish versions<sup>367</sup>. A detailed review appeared in the *Allgemeine deutsche Bibliothek* in the second quarter of 1783. As expected, the review was negative: The reviewer states that the author is biased and suspects, without knowing for sure, that he is an ex-Jesuit<sup>368</sup>. What is remarkable and informative for our question, however, is that the author takes the review as an opportunity to describe the general perception of Pombal and his political work among the German public. This general perception was obviously highly polarised in Germany, as it was in the rest of Europe. According to the reviewer, there were sworn enemies as well as fanatical supporters of the minister. Yet people basically agreed on the facts, the difference was only in the assessment of these facts. Thus, even “the bitterest enemies” of Pombal agreed that

[...] [his] intentions were to increase the royal (and therefore his own) power by suppressing the two most powerful estates, the nobility and the clergy, [and] he wanted to withdraw Portugal from the rule of the Roman See in ecclesiastical matters, and of England in commercial matters, thereby cultivating one of the most backward European nations, and leading it to science and enlightenment from time-barred prejudices<sup>369</sup>.

Needless to say, the description of Portugal as a backward nation ruled by Rome and England corresponded to a widespread European stereotype typical of the time<sup>370</sup>. In the German context, however, this description served in particular to identify the positive self-image of Protestant Germany as the core of a progressive and enlightened nation

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größeren Gewißheit in Absicht auf dieselben, gelangen wir auch mit Hülfe dieser Geschichte nicht [...]“, ADB Anh. 53.-86. Bd., 4. Abt. (1791), 2125.

<sup>366</sup> S. Miguel Batllori, S.J., *Francisco Gustá Apologista y Crítico (Barcelona 1744-Palermo 1816)*, Barcelona, Balmesiana, 1942; Franco Venturi, *The End of the Old Regime in Europe 1776-1789*, Princeton, Princeton University Press, 1991, p. 211.

<sup>367</sup> [Francesco Gusta], *Leben des Sebastian Joseph von Carvalho und Melo, Marquis von Pombal, Graf von Ocyras etc., Staatssekretärs und ersten Ministers des Königs von Portugal Josephs I.* [übersetzt von Jagemann, Christian Joseph], 5 vols., Leipzig, Schwickert, 1782.

<sup>368</sup> ADB 53 (1783), 462-468.

<sup>369</sup> „[...] [dass seine] Absichten auf Vergrößerung der königlichen (mithin seiner eigenen) Gewalt durch Unterdrückung der beyden mächtigsten Stände, des Adels und der Geistlichkeit, gingen, [und] er Portugal der Herrschaft des römischen Stuhls in geistlichen, und Englands in Handelssachen entziehen, dabey eine der am meisten zurückgebliebenen europäischen Nationen cultiviren, und von verjährtten Vorurtheilen sie zu Wissenschaften und Aufklärung leiten wollte“, ADB 53 (1783), 463.

<sup>370</sup> Cf. Kenneth Maxwell, *Pombal. Paradox of the Enlightenment*, Cambridge, Cambridge University Press, 1995, p. 1.

and at the same time to brand German Catholicism as backward-looking, retarded and unenlightened, thereby excluding it from the German nation as a foreign body<sup>371</sup>. Here and in other comparable texts of the Prussian-German Enlightenment, Portugal is held up to Catholic Germany as a distorting mirror and a threatening backdrop, and the message conveyed is that where the Catholic Church rules, Germany is threatened with the same fate as Portugal, namely regression by several centuries and economic and political decay. It is important to know that in the Holy Roman Empire there were still ecclesiastical territories ruled by Catholic prince-bishops until 1803, including those of the three powerful Catholic electors of Mainz, Trier and Cologne. So reports about Portugal and Pombal always had highly political implications within the Holy Roman Empire.

Admittedly, this did not necessarily imply unqualified approval of Pombal's person and his politics on the part of the Protestant Enlightenment thinkers. The reviewer is definitely one of the moderate voices here and concedes that the means Pombal used to achieve his enlightened ends give rise to doubts and are "covered with still impenetrable darkness"<sup>372</sup>. But it must be remembered that

he had to contend with enemies whom he was not always allowed to attack outright, and it is natural that in the many writings which he partly wrote himself, partly had written, he presented his actions not as they really were, but as he wished the public to view them<sup>373</sup>.

In other words, faced with the superiority of the forces responsible for Portugal's decline, Pombal had to resort to dubious methods: The end justifies the means.

The reviewer concludes that the perception of the Marquis of Pombal had changed considerably in recent years:

Ten to fifteen years ago, the general hatred of the Jesuits and the unanimous denunciations of them in so many countries, as well as the real progress that distinguished Portugal somewhat among the other powers of Europe, were more in favour of a favourable opinion of Pombal; now his case and the news spread in many ways by Jesuits seem to be more against him<sup>374</sup>.

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<sup>371</sup> Cf. Manuel Borutta, *Antikatholizismus. Deutschland und Italien im Zeitalter der europäischen Kulturkämpfe*, Göttingen, Vandenhoeck & Ruprecht, 2010.

<sup>372</sup> „[M]it noch undurchdringlichem Dunkel bedeckt [...]“, ADB 53 (1783), 463.

<sup>373</sup> „[...]dass] er mit Feinden zu kämpfen hatte, die er nicht immer geradezu angreifen durfte, und es ist natürlich, daß er seine Handlungen in den vielen Schriften, die er theils selbst schrieb, theils schreiben ließ, nicht so, wie sie wirklich waren, sondern so vorstellte, wie er wünschte, daß das Publikum sie ansehen möchte“, *Id., Ibid.*

<sup>374</sup> „Vor 10 – 15 Jahren stimmten der allgemeine Haß der Jesuiten und die übereinstimmenden Anklagen derselben in so vielen Ländern, so wie die wirkliche Fortschritte, welche Portugal etwas unter den übrigen Mächten von Europa auszeichneten, mehr für ein günstiges Urtheil vom Pombal; itz scheinen

## CONCLUSION: POMBAL AS A KEY FIGURE IN THE POLARISED CONTROVERSY OF THE LATE ENLIGHTENMENT

This observation shows that the perception of Pombal in Germany was always closely linked to the question of how one stood towards Catholicism and the Jesuit order. Thus, the reviewer's observation of an alleged increase in the activity of ex-Jesuits corresponded to an increasingly widespread fear in parts of the Protestant public by the 1780s, of an infiltration of the Enlightenment and the Protestant states by ex-Jesuits, crypto-Catholics and "pro-selytising". Enlightenment and Catholicism became increasingly antagonistic, at least from a Protestant perspective. In the course of these late Enlightenment debates, which were fought out with increasing agitation in pamphlets and journals, differentiating positions hardly penetrated. Instead, conspiracy theories about the continued underground existence of the Jesuit Order as a secret society gained the upper hand<sup>375</sup>.

The conspiracist polarisation of the German public came to a climax with the outbreak of the French Revolution. In retrospect, the student Carl Wiggers, in his speech of 1796, could therefore no longer muster any understanding for the fact that there had been a time in Europe and in Germany when things had been so bad for the reputation of the ex-minister Pombal: "[...] It is incomprehensible how one could for a moment have misgivings about acknowledging the warmest patriotism of a man who did so much for his fatherland"<sup>376</sup>. The young Protestant did not doubt for a moment that the abolition of the Jesuit Order and the restriction of the Papal Church was a great merit not only for Portugal and the Catholic world, but for all Europe. Catholicism had long since become completely incompatible with the idea of progress and national sovereignty in the minds of the Protestant pupils of the Güstrow grammar school. In view of these convictions, the character flaws and mistakes of the Marquis of Pombal could hardly be of any significance. Likewise, the victims of his reform policy could be dismissed as collateral damage. In his character study of the great man, Carl Wigger's aim was precisely not to sing a panegyric in praise of the Portuguese minister. Rather, it seems to be exactly Pombal's ambivalence that particularly qualified him as the subject of a discussion of historical fame and great men, and placed him in the ranks of the most famous ministers of state of the early modern period:

He was less restless than Alberoni, as faithful a servant as Sully, as skilful a minister as Colbert, and his name will thus be preserved with those great men to the latest posterity<sup>377</sup>.

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sein Fall und die auf mancherley Art durch Exjesuiten verbreitete Nachrichten mehr gegen ihn einzunehmen", *Id., Ibid.*, p. 464.

<sup>375</sup> Cf. Peter Wolf, *Op. Cit.*

<sup>376</sup> „[...] Es ist unbegreiflich, wie man einen Augenblick Bedenken tragen konnte, den wärmsten Patriotismus eines Mannes anzuerkennen, der so viel für sein Vaterland tat“. Sample essays by the high school graduates Behm, Wiggers, Hopp and Hoekh, Michaelmas 1804: Universitätsbibliothek Rostock: Num. 1.: R 91 a, p. 8.

<sup>377</sup> „Er war weniger unruhig als Alberoni, ein ebenso treuer Diener als Sully, ein so geschickter Minister als Colbert, und sein Name wird also mit jenen großen Männern bis auf die spätesten Nachwelt erhalten

# POMBAL: THE BEST-KNOWN PORTUGUESE STATESMAN IN RUSSIA

JOSÉ MILHAZES<sup>378</sup>

Sebastião José de Carvalho e Melo was undoubtedly one of the best-known Portuguese statesmen in the 18<sup>th</sup> century Russian Empire. His fame is mainly due to his reaction to the destructive consequences of the Lisbon earthquake of 1755. The famous phrase also reached Saint Petersburg: “Bury the dead, take care of the living”.

However, a sometimes unfairly forgotten important fact is the role of the Marquis of Pombal in the establishment of diplomatic and commercial relations. It is true that they began in the reigns of D. Maria I and Catarina II, but the foundations were laid in the reign of D. José I.

Furthermore, the Count of Oeiras supported Russia in the war against the Turks by allowing the Russian warships to stop in Lisbon on their way from the Baltic Sea to the eastern part of the Mediterranean.

## ECHOES OF THE LISBON EARTHQUAKE AND OF THE ACTION OF THE MARQUIS OF POMBAL IN RUSSIA

The earthquake, which practically destroyed Lisbon on the morning of November 1, 1755, had great repercussions in Russia as well. Suffice it to mention that the *Sankt Peterburskie Vedomosti* (News from Saint Petersburg), a biweekly newspaper and official organ of the Russian court, published news from the Portuguese capital in all its 1756 numbers.

The first pieces of news about the Lisbon earthquake reached St. Petersburg through its ambassador in London, Alexandre Golitsin. In a letter dated November 14, 1755, the Russian diplomat reports: “With yesterday’s French mail, many local merchants received letters from Paris mentioning the terrible earthquake that had taken place in Lisbon, and that the largest part of that city had been destroyed, at least, crushing a large number of people”<sup>379</sup>.

Reports on the dimensions of the catastrophe in the Portuguese capital are so terrible and unbelievable that Prince Golitsin awaits more data to confirm or deny them. On November 16, the Russian diplomat confirms the worst-case scenario. Quoting information

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werden“, Id., Ibid., p. 10.

<sup>378</sup> University of Porto.

<sup>379</sup> Excerpt from Alexandre Mikhailovitch Golitsin’s letter, Plenipotentiary Minister of Russia in London, to Empress Elizabeth Petrovna, London, November 14/25, 1755, AVRIP, f. 35, op. 1, d. 769, l. 365-366 ob.

the son of the Spanish ambassador sent from Lisbon, he reports: “On November 1, the earthquake in Lisbon was so great that most of the city was devastated, and about a hundred thousand people crushed”. And he continues: “After four days, the horrible bangs continued, so the still intact part of the city began to burn, due to the lightning and the flames that came out of the earth”<sup>380</sup>.

The first piece of news published by the Russian newspaper originates from Porto and is dated December 16, 1755: “Three navigators brought us the news that they had not found the island of Madeira and, therefore, they believe that it disappeared during the earthquake. Either they did not know where it is located, or they had very bad eyesight”. The newspaper correspondent calls this information into question, citing another source: “A few days before, a boat from Madeira arrived at our port, where its captain loaded his cargo after the earthquake. He assured that the consequences of the event were of little importance, given that only a few old houses had collapsed”. Another piece of news dated December 12 and published in the same issue, but from Belém, claims that “the king of Portugal ordered the reinforcement of the guard of different departments and ministries”, stressing that the residence of the English ambassador had been the target of an attempted robbery. “The king has firmly decided to rebuild his capital in the same place. A Royal Edict has already been published to that effect” — informs the Russian biweekly on January 20, 1756<sup>381</sup>.

The Russian Orthodox Church used the disastrous consequences of the Lisbon earthquake to show where human sins can lead. Considering the discussion at European level about the natural or divine origin of the misfortune that tore apart the Portuguese capital, the preacher of the Russian court, monk Guedeon, from the Trinity Lavra of St. Sergius, one of the best-known centers of Russian Orthodoxy, dedicated a sermon to the analysis of events: “About the terrible earthquake that occurred in Africa and Europe in 1755”, comparing the Lisbon earthquake to biblical punishments such as the deluge or the destruction of the cities of Sodom and Gomorrah, he completes: “I just want to say that this was done to strike fear into us sinners and turn us away from our sins”<sup>382</sup>.

However, not all Russians at the time agreed with this reasoning. The encyclopedist Mikhail Lomonossov, in his work “Discourse on the Generation of Metals by Earthquakes”, attributed the Lisbon earthquake to natural causes. (5) Works by Voltaire such as “Poem on the Lisbon Disaster” or “*Candide, ou l’Optimisme*” were published numerous times in Russia.

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<sup>380</sup> Excerpt from Alexandre Mikhailovitch Golitsin’s letter, Plenipotentiary Minister of Russia in London, to Empress Elizabeth Petrovna, London, November 16/27, 1755, AVRIP, f. 35, op.1, d. 769, l. 370371 ob.

<sup>381</sup> *Sankt Peterburgskie Vedomosti*, December 16, 1755; January 20, 1756.

<sup>382</sup> *Colectânea de Diferentes Sermões Edificantes do Pregador Monge Gedeon*, vol. II, Saint Petersburg, pp. 316-322.

## THE FOUNDATION OF PORTUGUESE-RUSSIAN RELATIONS

The process of establishing direct and regular commercial relations between Portugal and Russia, as well as diplomatic relations between the two countries, took almost a century, having suffered a strong impulse in the reign of D. José I.

After one of the numerous pauses recorded in this process, talks on the establishment of commercial relations between Portugal and Russia resumed in 1751 in London. On September 7 of that year, Joaquim José Fidalgo da Silveira, Portugal's extraordinary envoy in the British capital, wrote to Sebastião José de Carvalho e Melo, Secretary of State for Foreign Affairs and War:

Conversations with the Count of Chernishev, Minister of Russia at this Court, on the commerce of his nation have happened here a few times. He has told me that the products from his country that Portugal needs are ordinarily taken by foreign ships, being, moreover, more useful to trade directly [= direct] and by the ships of one and another nation. For this purpose, regulations and establishments on some articles of commerce in this business could be dealt with here, and that he would notify his court if I wanted to do the same. If this seems useful, with Your Excellency's warning, I will continue with this practice (translated)<sup>383</sup>.

In another letter sent by Joaquim José Fidalgo da Silveira to Sebastião José de Carvalho e Melo (September 28, 1751), the Portuguese diplomat insists on the topic, stressing that the Russian authorities were attentive to Portugal's needs:

The Minister of Russia spoke to me again about what Your Excellency said in my letter of the 7<sup>th</sup> of this month, on the occasion of the news written here in all the gazettes that the King, our Lord, was seeking to increase his navy and that again he had 12 warships built, telling me that most of the goods that came from Russia consisted of materials necessary for this purpose (translated)<sup>384</sup>.

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<sup>383</sup> *Relações Diplomáticas Luso-Russas. Colectânea Documental Conjunta (1722-1815)*, vol. 1, Lisbon, Diplomatic Institute, 2004, p. 53. Original version of the quote: "Tem sucedido praticar aqui algumas vezes com o conde de Tchernichev, ministro da Rússia nesta Corte, sobre o comércio da sua nação, e me tem dito que os géneros necessários a Portugal do produto do seu país os levam ordinariamente navios estrangeiros, sendo, aliás, mais útil comerciar em direitura [= directo] e pelos navios de uma e outra nação, regrando-se e estabelecendo-se para este efeito alguns artigos de comércio que este negócio se poderia aqui tratar, e que o avisaria a sua corte se eu quisesse fazer o mesmo. Se isto parecer útil, com o avisado de Vossa Excelência, continuarei na dita prática".

<sup>384</sup> *Relações Diplomáticas Luso-Russas. Colectânea Documental Conjunta (1722-1815)*, vol. 1, Lisbon, Diplomatic Institute, 2004, p. 54: "O Ministro da Rússia me tornou a falar sobre o que disse a Vossa Excelência em

The Russian authorities' insistence was based on clear and concrete insights. They were aware of the Portuguese lack of items necessary for maritime navigation, such as linen for sails, wood for masts, and iron for spikes, which constituted excellent goods to be exchanged for products from mainland Portugal and its overseas territories, particularly wine, salt, cork, sugar, cotton, coffee, and indigo.

The long talks between the courts of Lisbon and St. Petersburg suffer a new pause, this one apparently caused by the Lisbon earthquake.

In June 1765, when the Marquis of Pombal learned that Prince Sergei Mecherski, secretary of the Russian Mission in Madrid, was in Lisbon on his way to Russia, the Portuguese Prime Minister invited the Russian diplomat to a meeting to address the issue of establishing trade between both countries.

In fact, the next day, the aforementioned minister talked a lot with me, having expressed great interest in this regard... He thought that if our court wanted to send to Lisbon, as a trial, a ship with our products, then a direct trade plan could be made that would be of use to both nations. He also added that, due to their important role, the Russian and Portuguese ministries could not look after the interests of the private traders of the two nations and the way in which they would settle and trade with each other. Consequently, it would be necessary to have resident Plenipotentiary Ministers representing both Courts, as was the case with other powers, pointing, in this regard, that he understood that we should be the first ones (me, for my part) to appoint such a [representative] (translated)<sup>385</sup>.

The international situation itself forced the Russian court to accelerate the process of rapprochement with Portugal. In 1768, Russia goes to war with Turkey and Empress Catherine II decides to attack the Turks from two sides: in addition to the already traditional offensives in an extensive region that stretched from the Crimean Peninsula to the Balkans, the Russian court sends a strong fleet to the Mediterranean Sea. The Lisbon port

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a minha carta de 7 deste mês, com a ocasião de se ter aqui escrito em todas as gazetas que El-Rei, nosso Senhor, cuidava muito em aumentar a sua marinha e que novamente tinha mandado construir 12 naus de guerra, dizendo-me que a maior parte dos géneros que vinham da Rússia consistiam em materiais necessários para este efeito”.

<sup>385</sup> *Id., Ibid.*, p. 72: “De facto, no dia seguinte, o citado ministro conversou bastante comigo, tendo manifestado grande interesse a este respeito... Ele pensava que se a nossa corte quisesse enviar a Lisboa, a título de experiência, um navio com os nossos produtos, a seguir se poderia fazer um plano de comércio directo que seria de utilidade para ambas as nações. Acrescentou também que devido ao seu importante exercício, os ministérios russo e português não podiam zelar pelos interesses dos negociantes particulares das duas nações e pela maneira como iriam instalar-se e fazer comércio recíproco. Por conseguinte, seria necessário ter Ministros Plenipotenciários residentes em representação de ambas as Cortes, a exemplo do que acontecia com outras potências, referindo, a este propósito que entendia que nós devíamos ser os primeiros (eu, por minha parte) a nomear tal [representante]”.



could be a strategic point in support of Russian military ships. This was one of the reasons that led the tsarina to appoint the Hamburg merchant and banker, Iohann Borchers, consul-general of Russia in the Portuguese capital.

However, this plan by the court of Saint Petersburg ran into resistance from European powers such as England and France, who feared that Russian power on the European continent would be too strengthened.

The Lisbon court took these pressures into account, but left a “small door” open: in case of “extreme need or obvious danger at sea”. On October 20, 1769, two Russian warships heading towards the Mediterranean docked in Lisbon due to a strong storm on the Portuguese coast. The reception given to the Russian crews in Lisbon could not have been warmer, as the officers were received by the royal family<sup>386</sup>.

That is why Nikita Panin, head of Russian diplomacy, orders the following to Iohann Borchers:

I charge you, therefore, Sir, to tell the Count of Oeiras that His Imperial Majesty does not consider anything other than a true good office and an unequivocal mark of friendship, the asylum and assistance that these ships found in the ports of His Faithful Majesty, and that She will not fail to act in the most perfect reciprocity whenever She has to show the same feelings for the King. You will then pay my compliments to the Minister, who so wisely and brilliantly directs the affairs of this monarchy, and show him our gratitude for the affectionate gaze under which he is willing to consider ours (translated)<sup>387</sup>.

Due to diplomatic obstacles and the priorities of the Portuguese and Russian courts in foreign policy, it was only on October 24, 1779 that Francisco José Horta Machado presented his credentials to Empress Catherine II. However, it cannot be stressed enough that Sebastião José de Carvalho e Melo was the main promoter of bringing the two courts closer together.

Russian diplomats also closely followed the activities of the Count of Oeiras at the head of the Portuguese government. They attentively watched the measures the Marquis of Pombal took, such as the expulsion of the Jesuits from Portugal, the incidents linked to the attempt on the life of D. José I, and those directed to crushing the conspiracy.

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<sup>386</sup> *Id., Ibid.*, p. 64.

<sup>387</sup> *Id., Ibid.*, p. 104: “Encarrego-vos, por isso, Senhor, de dizer ao Conde D’Oeiras que Sua Majestade Imperial não considera outra coisa senão um verdadeiro bom officio e uma marca inequívoca de amizade, o asilo e assistência que estes navios encontraram nos portos de Sua Majestade Fiel, e que Ela não deixará de agir na mais perfeita reciprocidade sempre que tiver que mostrar os mesmos sentimentos pelo Rei. O senhor fará na sequência um elogio meu ao Ministro que dirige com tanta sabedoria e brilho os negócios dessa monarquia e lhe mostrará nosso reconhecimento pelo olhar afetuoso sob o qual está disposto a considerar os nossos”.

The aforementioned Russian diplomat Sergei Mecherski left a very detailed highlight of his work in several areas:

This minister is a person of great knowledge, he is discerning and refined, bringing together great abilities to govern. Some attribute particular interests to him, based on the enrichment of his family. But its main ambition consists solely in the zeal with which he develops the Portuguese kingdom, that is, its development is owed to him alone (translated)<sup>388</sup>.

In another letter, Prince Sergei Mecherski gives a comprehensive account of the Marquis of Pombal and his reforms to show the Saint Petersburg Court that he is the politician with whom the Russian Empire must work:

I am sure that Your Excellency will be pleased to read the historical details of the ministry of the Count of Oeiras. He is the light of this country, he has done beautiful things here, and we will have to work with him for the interests that we may have to pursue in this country. The Count of Oeiras, after having traveled through foreign countries, where he acquired the best knowledge, entered the ministry here in 1756. He was made to govern any other nation very well; but he was cleaner than he was. He found finance, commerce, armed forces, customs, and the spirit of the nation in a state of unspeakable barbarism. All parts of the State were in disarray. A strong fanaticism spread through this chaos, and the veil of religion covered and protected all these vices that had reached their highest point. It took a very bold hand to lift that veil, to attack all the orders of the State. The reform, however, had to concern everyone or was impracticable. The nobility was proud, coward, ignorant, and rebellious; priests and monks could do anything. Finances were drained, there were neither troops nor ships nor agriculture; the English yoke which had taken all the power and all the money was the most intolerable of all these evils for a good citizen. However, the Count of Oeiras (Don Joseph Carvalho at that time) could never remedy anything without a miracle and a special permission from Providence. We will reveal three dark events that should lead to the doom of Portugal. The earthquake that destroyed half of Lisbon placed the reins of government in the hands of Don Joseph Carvalho and made him rule. He was the only one not afraid in this event. I have just read two hundred and thirty-three decrees or orders, which he made on this subject in less than three months, and most of them were made in the first few days. In the following year, most of the nobles

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<sup>388</sup> “Este ministro é uma pessoa de grandes conhecimentos, é perspicaz e refinado, reunindo em si grandes capacidades para governar. Alguns atribuem-lhe interesses particulares, baseados no enriquecimento da sua família. Mas a sua principal ambição consiste unicamente no zelo com que desenvolve o reino português, isto é, que só a ele deve o seu desenvolvimento”.

of the kingdom were displeased with the rule of a man who wanted to destroy the disturbances that formed their forces, so they attacked the king, organizing and carrying out a terrible attack against the person of the king. Everyone is aware of the consequences of this event, the stupidity of the conspirators, and their punishment. He occasioned two good actions: the minister killed the nobles, expelled the Jesuits, repressed the clergy, and then he had no more powerful enemies. The most vicious and difficult part to reform was the trade. The English had convinced the Portuguese that agriculture and manufactures were useless to a country that possessed gold, and supplied all life necessities in Portugal; exclusively, and, therefore, channeled all Portuguese money for a bit of industry. He had to overcome national laziness, which greatly delayed his operation. Meanwhile, he pitted system against system. The king had no share in the profits, he, on the contrary, transferred all the profits to the king. To this end, the minister concentrated all trade in companies as a means to take the credit and the industry out of the hands of individuals. That would be a tyranny if the merchants of Lisbon and Porto were Portuguese, but they are all English or figurehead of the English, so it does not harm them... They say he ruined trade, that his ministry reduced speculation, finally they complain a lot and condemn him. Looks are against him, but he is doing well, and he is right. Agriculture is recovering. He had vines uprooted to obtain wheat, established manufactures, and prohibited the importation of foreign products; finally, he returned to the prudent principle, which must be the basis of all governments, so that there is no need for anything. Portugal will have the first genres and industries again, but that takes time; the profit will be distributed to the nation as well as to the workforce, and he will have the rest in gold. But that takes time. This system does not fulfill all the orders of the Count of Oeiras and, as wisdom makes me predict success, they are beneficial for our insertion here (translated)<sup>389</sup>.

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<sup>389</sup> *Id., Ibid.*, p. 72-77: “Estou certo de que Vossa Excelência lerá com agrado os detalhes históricos do Ministério do Conde de Oeiras. Ele é a luz deste país, ele fez coisas belas aqui, e é com ele que teremos que trabalhar pelos interesses que possamos ter de tratar com este país. O conde de Oeiras, depois de ter viajado por países estrangeiros, onde adquiriu o melhor conhecimento, entrou no ministério aqui em 1756. Foi feito para governar muito bem qualquer outra nação; mas ele era mais limpo do que era. Ele achou as finanças, o comércio, as forças armadas, os costumes, o espírito da nação num estado de barbárie inexprimível. Todas as partes do Estado estavam em desordem. Um forte fanatismo se espalhou por esse caos, e o véu da religião cobriu e protegeu todos esses vícios que haviam atingido o ponto mais alto. Foi preciso uma mão muito ousada para levantar esse véu, para atacar todas as ordens do Estado. A reforma, no entanto, tinha de dizer respeito a todos ou era impraticável, a nobreza era orgulhosa, covarde, ignorante e rebelde; sacerdotes e monges podiam fazer qualquer coisa. As finanças estavam esgotadas, não havia nem tropas, nem navios, nem agricultura; o jugo inglês que havia tomado todo o poder e todo o dinheiro era o mais intolerável de todos esses males para um bom cidadão. No entanto, o conde de Oeiras (Don Joseph Carvalho naquela época) nunca poderia remediar nada sem um milagre e uma permissão especial da Providência. Iremos revelar três eventos sombrios que deveriam levar à perdição de Portugal.

Another Russian diplomat, Dmitri Alekseevitch Golitsin, Russian Ambassador to the Hague, wrote to Iohann Anton Borchers, General Consul of Russia in Lisbon, on May 5, 1770, about the Marquis of Pombal:

Sir, these kinds of circumstances show the genius and the statesman. You already know what I think about this minister. I consider him one of the greatest and most honorable of our century. Therefore, I was never and never will be surprised to see him promulgate wise ordinances and laws for the benefit of the sovereign and the State he serves. I know very well, sir, that my praise and my suffrage are not important to that gentleman, but I do not have the honor of meeting him personally, and I cannot flatter myself for never having that opportunity, therefore I have no hidden interests with him whatsoever. I do it as a decidedly impartial judge, and the justice I do him is an homage that every thinking being must truly deserve (translated)<sup>390</sup>.

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O terremoto que destruiu metade de Lisboa estabeleceu as rédeas do governo nas mãos de Don Joseph Carvalho e o fez governar. Ele foi o único que não teve medo neste evento. Acabei de ler duzentos e trinta e três decretos ou ordens, que ele fez sobre esse assunto em menos de três meses e o maior número deles foi feito nos primeiros dias. No ano seguinte, a maioria dos nobres do reino estava descontente com o governo de um homem que queria destruir os distúrbios que formavam suas forças, atacou o rei e organizou e realizou um terrível ataque contra a pessoa do rei. Todos estão cientes das consequências desse evento, da estupidez dos conspiradores e de seus castigos. Ele produziu dois bens: o ministro matou os nobres, expulsou os jesuítas, reprimiu o clero e depois não teve inimigos mais poderosos. A parte mais viciosa e difícil de reformar foi o comércio. Os ingleses haviam convencido os portugueses de que a agricultura e as manufacturas eram inúteis num país que possuía ouro, e supriam todas as necessidades da vida de Portugal; exclusivamente e, portanto, canalizava todo o seu dinheiro por um pouco de indústria. Ele teve de vencer a preguiça nacional, o que atrasou bastante a sua operação. Enquanto isso, ele opunha sistema a sistema. O rei não tinha participação nos lucros, ele, pelo contrário, transferiu todos os lucros para o rei. Para esse fim, ele concentrou todo o comércio em companhias. Por meio do qual remove o crédito e a indústria dos indivíduos. Isso seria uma tirania se os comerciantes de Lisboa e Porto fossem portugueses, mas todos são ingleses ou testas de ferro dos ingleses, por isso não lhes faz mal... Dizem que ele arruinou o comércio, que o seu ministério reduziu a especulação, finalmente reclama-se muito e condenam-no. A aparência é contra ele, mas ele está indo bem e ele está certo. A agricultura está a recuperar. Ele fez arrancar videiras para obter trigo, estabeleceu manufacturas e proíbe a importação de produtos estrangeiros; finalmente, voltou ao princípio prudente, que deve ser a base de todo o governo, para que não haja necessidade de nada. Portugal voltará a ter os primeiros gêneros e indústrias, mas isso leva tempo; o lucro será distribuído na nação, bem como na força de trabalho, e ele terá o resto de ouro. Mas isso leva tempo. Esse sistema não atende a todas as ordens do Conde de Oeiras e, como a sabedoria me faz prever o sucesso, [e] elas são benéficas para nossa introdução aqui.”

<sup>390</sup> *Id., Ibid.*, pp. 105-106: “Senhor, é nesse tipo de circunstância que se vê o gênio e o estadista. Você já sabe o que eu penso sobre este ministro. Eu considero-o um dos maiores e mais honrosos do nosso século. Portanto, nunca fiquei e nunca ficarei surpreso ao vê-lo promulgar ordenanças e leis sábias para a utilidade para o soberano e o Estado que ele serve. Sei bem, senhor, que o meu louvor e o meu sufrágio não são importantes para esse senhor, mas não tenho a honra de conhecê-lo pessoalmente e não me posso lisonjear por nunca ter tido essa oportunidade, por conseguinte não tenho qualquer tipo de interesse com ele, faço-o como o juiz decididamente imparcial e a justiça que eu lhe faço é uma homenagem que todo ser pensante deve realmente merecer”.

Otto Stackelberg, diplomat who represented Russia at the Madrid Court between 1767 and 1771, wrote to Empress Catherine II:

His genius [of the Marquis of Pombal] penetrates all branches of the State, while at the same time giving commerce all the prosperity possible in the context of the unfavorable situation regarding trade between Portugal and England... Rare man who managed to shake partially the yoke that Portugal suffered due to the treaties with Charles II of England (translated)<sup>391</sup>.

And the Marquis de Pombal's fame in Russia did not disappear with his death. Pavel Svinin, a Russian naval officer who visited Lisbon in 1807, wrote in his work *Recordações da Armada* [Memories of the Armada]:

In Portugal, in every institution of mercy, in every public building, Pombal can be seen everywhere, everything about him reminds one of the spirits of Peter the Great in Russia. This is the only minister who, like the immortal Russian monarch, elevated his State as if by magic; he took it out of the darkness of ignorance and obscurantism, summoned the sciences, the arts, formed an army, an armada, revived commerce, and forced foreign powers to respect his homeland. He particularly revealed his love for the latter and a rare presence of mind during the terrible earthquake of 1755, which left the capital in ruins. Under his direction this city was rebuilt and placed in a prosperous situation. Word has it that Pombal spent a whole week after the earthquake in a coach or on horseback, responding, day and night, to the needs of each person, liquidating conjurations, consoling the victims, and stopping contagions (translated).

Pavel Svinin also points out other reforms carried out by the Count of Oeiras: "Pombal was equally famous for having expelled the dangerous Jesuits from his state and for having prevented an important attempt on the life of his monarch, the benefactor and the happiness of the country" (translated).

Another fact in the political biography draws the attention of the Russian traveler: "The Marquis of Pombal came from a lower stratum. Glory to the monarch who knows how to choose and respect such a man, who allowed the natural revelation of his gifts"<sup>392</sup>.

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<sup>391</sup> Otto Stackelberg, Archive from the University of Tartu: "O seu génio [do marquês de Pombal] penetra todos os ramos do Estado, ao mesmo tempo que dá ao comércio toda a prosperidade possível no contexto da situação pouco vantajosa que existe no comércio entre Portugal e a Inglaterra... Homem raro que conseguiu abalar parcialmente o jugo que Portugal sofria devido aos tratados com Carlos II de Inglaterra".

<sup>392</sup> Pavel Svinin, *Recordações da Armada*, pp. 124-126: "Em Portugal, em cada instituição de misericórdia, em cada edifício público, em toda a parte se vê Pombal, tudo o faz lembrar como, na Rússia, o génio de Pedro, o Grande. Este é o único ministro que, tal como o imortal monarca russo, elevou o seu Es-

The achievements of the Count of Oeiras are still remembered in Russia today. The poet Mikhail Reznitzkii (1937), for instance, praises him as follows:

They lie to us about crowns and thrones.

I want everyone to know:

A distinguished man lived,

The noble Marquis of Pombal.

Inflexible in politics,

All plans he accomplished:

Lisbon extended,

A university founded

The illuminated Marquis of Pombal.

The chroniclers know for sure:

That the Marquis when saying: "I will repay",

In place he put the Jesuits

Headed into the Inquisition.

Although in Europe reigned

The feudal ruination,

But the country was run

Not by a brainless giant

But by the wise Marquis of Pombal.

Eighteenth century minuets,

Thin like an oriental carpet.

Ripped off the piccolos,

Creating mysterious bohemia.

And among musicians and poets

Pombal always directed the ball,

And sipped port wine,

This connoisseur of prettiness

The indefatigable Marquis of Pombal.

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tado como que por magia; tirou-o das trevas da ignorância e do obscurantismo, chamou as ciências, as artes, formou um exército, uma armada, fez renascer o comércio e obrigou as potências estrangeiras a respeitar a sua pátria. Ele revelou de forma particular o seu amor a essa última e uma presença rara de espírito durante o terrível terramoto de 1755, que transformou a capital em ruínas. Sob a sua direcção foi reconstruída esta cidade e colocada numa situação próspera. Dizem que Pombal passou uma semana inteira depois do terramoto num coche ou a cavalo, respondendo, dia e noite, às necessidades de cada um, liquidando conjuras, consolando as vítimas e travando contágios”.

By the way, let it stay between us,  
As the French would say, between nous.  
I want you to live on passions  
And intelligence, if any.  
And there is your beautiful pedestal,  
Not tired to glance  
At his Portugal  
The incomparable Marquis of Pombal<sup>393</sup>

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<sup>393</sup> José Milhazes e Siiri Milhazes, Portugal, *Aqui Existe Espírito Russo*, Lisboa, Alêtheia, 2012. (in Russian): “Mentem-nos sobre coroas e tronos./ Quero que cada um saiba:/ Viveu um homem distinto, /O nobre Marquês do Pombal./ Inflexível na política,/ Todos os planos realizou:/ Lisboa alargou,/ Uma faculdade fundou/ O iluminado Marquês de Pombal./ Sabem ao certo os cronistas:/ Que o marquês ao dizer: ‘Retribuirei’,/ No lugar pôs os jesuítas/ Deu na cabeça à Inquisição./ Embora na Europa reinasse/ A feudal podridão,/ Mas o país era dirigido/ Não por um gigante desmiolado/ Mas pelo sábio Marquês de Pombal./ Século dezoito de minuetes,/ Fino como um tapete oriental./ Arrancados dos flautins,/ Criando misteriosa boémia./ E entre músicos e poetas/ Pombal dirigia sempre o baile,/ E bebericava vinho do Porto,/ Este conhecedor de beldades/ O infatigável Marquês de Pombal./ A propósito, que fique entre nós,/ Como diria o francês, entre nous./ Quero que vivam de paixões/ E de inteligência, se a houver./ E lá está seu belo pedestal,/ Não se cansando de olhar/ Para o seu Portugal/ O incomparável Marquês de Pombal”.

# “ALL VERSES HE READ ABOUT THE EQUESTRIAN STATUE”: POWER PERFORMANCE AND LITERARY AUDIENCES<sup>394</sup>

MARIA LUÍSA MALATO<sup>395</sup>

FERNANDO MATOS OLIVEIRA<sup>396</sup>

*Era um flagello este tyranno mestre  
Dos ouvidos e faces dos freguezes;  
Todos os versos leu da Estatua Equestre  
(Nicolau Tolentino de Almeida, “O Bilhar”)*

Countless poetic compositions were written during and after the inauguration of the Equestrian Statue of the King of Portugal D. José I on his birthday, June 6, 1775. The festivities lasted three days; however, they were extended throughout the kingdom for a lot longer. The celebration had the greatest impact and resonance in the Portuguese culture in the 18<sup>th</sup> century. A well-known satirical author, Nicolau Tolentino de Almeida, was part of the vast list of poets who glossed over the theme of the inauguration. In spite of that, he characterized the readers of this sort of poetry of circumstance as “minor”, like a “bad poet” who had followed the barber profession when young (he is certainly referring to the poet Domingos dos Reis Quita, his contemporary), compulsively attracted by these and other compositions of the genre, all of marginal taste and sold on the street:

This master tyrant was a scourge / From the ears and faces of the costumers; / All verses he read about the Equestrian Statue / And all the famous plays / Sold in the Arsenal to the vagrant wanderer / On a string / Of tired rancid poetry / Thick vol-

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<sup>394</sup> This text is part of the FCT-funded project “Literature and Borders of Knowledge - Inclusion Policies” of the Margarida Losa Institute for Comparative Literature (UID/ELT/00500/2013 | POCI-01-0145-FEDER-007339). It is also linked to performance studies developed in Group 4 of the Center for Interdisciplinary Studies (CEIS20). Finally, it is based on the article: “Performance and intelligentsia around the inauguration of an Equestrian Statue in the 18<sup>th</sup> century”, *Journal Performance and Spectacle in Early Modern Europe*, n.º 6: [http://www.artidellospettacolo-performingarts.com/images/2020\\_\\_1\\_Matos.pdf](http://www.artidellospettacolo-performingarts.com/images/2020__1_Matos.pdf) (publ. December 12, 2020).

<sup>395</sup> University of Porto, Portugal.

<sup>396</sup> University of Coimbra, Portugal.



ume in the pocket walked; / At the sign of people, would soon run / And the fatal letterhead pushed him (translated)<sup>397</sup>.

How could the inauguration of a statue in the city of Lisbon activate the public imagination, the written and artistic production of an entire era, mobilizing poetry, theatre, music, opera, and the statuary itself, now elevated to an unprecedented scale? How did the torrent of printed and manuscript poems become the very image of the compulsive reader, member of a social class that normally remained on the fringes of literary circles?

This essay proposes a culturalist and openly performative reading of this singular inauguration as an *occurrence*, considering historical and literary studies, in addition to conducting a detailed analysis of the symbolic topography, the choreography of gestures and inscriptions that defined the staging of this major event of the 18<sup>th</sup> century.

One can claim that improvisation or spontaneity did not underlie the occasion. Sebastião de Carvalho e Melo, Marquis of Pombal since 1770, planned the event in detail and announced it “eight days later” to the King as a political operation of the utmost importance<sup>398</sup>. As a cultural *performance*, the inauguration of the statue is a *liminal* event of broad significance in the Portuguese culture. It was a moment of public consecration of enlightened power, not only that of King D. José I, but also of his plenipotentiary minister, Sebastião José de Carvalho e Melo (1699-1782). After 1755, the minister of D. José had energetically reinforced the scope of his political action: “Pombal on the throne, the King on the lathe” was a saying that illustrated a situation of ambiguous governance, in which the King was distracted by his hobbies with wood, entrusting the erosion of power to his minister. With the reconstruction of Lisbon, Sebastião de Carvalho e Melo changed both the urban structure of the capital and the spaces for management and coexistence of civil society. The exemplary process of condemnation of the Távora family (1758-1759) had relegated the court nobility to an almost decorative role. The expulsion of the Jesuits (1759) had strengthened the principles of Regalism, which advocated greater State intervention in domains that until then had been under the authority of the Church. Almost until the death of the King in 1777, Pombal controlled the pretensions of high nobility,

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<sup>397</sup> “Era um flagello este tyranno mestre/ Dos ouvidos e faces dos freguezes;/ Todos os versos leu da Estatua Equestre/ E todos os famosos Entremezes/ Que no Arsenal ao vago caminhante/ Se vendem a cavallo n’um barbante./ De cançada rançosa poesia/ Grosso volume na algibeira andava;/ Em vendo gente, logo la corria/ E o fatal cartapácio lhe empurrava”. Nicolau Tolentino de Almeida, *Obras Completas*, with some unpublished and a biographical-critical essay by José de Torres, Lisboa, Ed. Castro Irmão e C.<sup>a</sup>, 1861.

<sup>398</sup> Marquês de Pombal, “Observações secretíssimas, na ocasião da inauguração da estátua equestre, no dia 6 de junho de 1775, e entregues por ele mesmo oito dias depois ao senhor rei D. José I”, in *Cartas e Outras Obras Selectas*, 5.<sup>a</sup> ed., t. I, Lisboa, Tipografia de Costa Sanches, 1861, pp. 12-24: [https://archive.org/stream/cartaseoutrasobr01pomb/cartaseoutrasobr01pomb\\_djvu.txt](https://archive.org/stream/cartaseoutrasobr01pomb/cartaseoutrasobr01pomb_djvu.txt) (consulted online on November 10, 2022).

centralized in the State the conquests of the missionaries in Brazil, reformed secular education, and promoted international trade.

In 1775, the year of the inauguration of the Equestrian Statue, curiously on the eve of his exile, Sebastião de Carvalho e Melo seems to exercise absolute political power. The statue is designed to occupy the center of the square, for which Sebastião Carvalho e Melo contributed in a decisive way, planning and building the ministerial offices on the rubble of the 1755 earthquake. It is located in the once called “Terreiro do Paço”, now referred to as “Praça do Comércio”, a name that is a “tribute to the new bourgeois class that supported the minister’s reformist policy”, producing, “in the French way”, a new royal square in Lisbon (translated)<sup>399</sup>. In one of the letters the Marquis of Pombal wrote to the King a week after the statue was inaugurated, Pombal explicitly mentions the plan to exhibit a new Enlightened society, open to commerce. The inauguration would show that the lack of basis of the contempt to which foreigners voted our internal and external trade, along with the suspicion of social insubordination or the rumors that the country was in extreme poverty after the earthquake<sup>400</sup>. The event exemplifies the care that the Marquis put into the staging of a “theatre” prepared, above all, to spectators/external observers: in fact, the profusion of jewels, tableware, dresses, carriages, tables, and cash disbursements would make the same foreigners publicly confess that they had never imagined that Portugal had accumulated so much wealth so shortly after the earthquake disaster<sup>401</sup>.

The contiguity between the instrumental and the aesthetic dimension in the 1775 event is undeniable. Additionally, the analogy with the theatrical space can be observed in the very first paragraph of the letter, more specifically in one of its first words: “curtain”.

*The great curtain* which, in the most joyous 6<sup>th</sup> day of the current month of June 1775, uncovered the royal statue of my lord the King has come to reveal that, in the following days, to the clear knowledge of all those who, by going beyond the surface of the objects which are presented to them in sight, begin to investigate and understand the substance of things: that Your Majesty has not only entirely dispelled the darkness and repaired the ruins in which you have found your kingdoms buried; but also that you have brought out again, in Portugal, the blissful century of the lords D. Manuel and D. João III (our italics, translated)<sup>402</sup>.

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<sup>399</sup> José Augusto França, in José Machado de Castro, *Descrição Analytica da Execução da Estatua Equestre Erigida em Lisboa á Gloria do Senhor Rei Fidelissimo D. José I*, afterword by José Augusto França, Lisboa, Academia Nacional de Belas Artes, 1975.

<sup>400</sup> Marquês de Pombal, *Op. Cit.*, pp. 12-14.

<sup>401</sup> *Id.*, *Ibid.*, p. 21.

<sup>402</sup> *Id.*, *Ibid.*, p. 12. “A grande cortina, que no felicissimo dia 6 do corrente mez de junho de 1775, descobriu a régia estatua delrey meu senhor veio manifestar nos dias sucessivos, ao claro conhecimento de todos aquelles que não parando na superfície dos objectos que lhes apresentam á vista, passam a investigar e com-

If a “performance” is characterized by the coexistence of actors and spectators, the ephemeral character of acting, its status as an event, and the rhetorical intention of persuading through non-explicit meanings, the inauguration of the Equestrian Statue of D. José I embodies a performative act both from the point of view of reception and from that of production. Therefore, it seems pertinent to consider here Erika Fischer-Lichte’s discussion on “liminality”, which is manifested simultaneously in “social performance” and “aesthetic performance” – two complementary processes of transition and transformation in human communities:

When characterizing the particular “event-ness” of performances, we differentiated between the possibility of liminality in aesthetic and non-aesthetic experience. Aesthetic experience makes the state of liminality its goal, while non-aesthetic liminal experience can be understood as a means to an end – be it to obtain a new social status or identity, to create or affirm communities, or to legitimate claims to power. There is no clear correlation between aesthetic experience and artistic performance, or non-aesthetic experience and nonartistic performance – both kinds of experiences mix in any given performance. In artistic performances, liminality can be experienced both as an end in itself and as a means to another end<sup>403</sup>.

It is a staging that requires the participation of “all those who, by going beyond the surface of the objects which are presented to them in sight, begin to investigate and understand the substance of things” (translated)<sup>404</sup>. Nonetheless, this meaning is not explicit for the general public, even though the Marquis of Pombal makes it explicit to the King. According to Sebastião de Carvalho e Melo, at the event, nine general observations are staged during the inauguration act, all related to the improvement of the state of mechanical crafts, liberal arts, philosophy and fine arts, exact sciences, internal and external trade, harmonious society and the growing opulence of vassals. From our point of view, considering the appreciation of the poems about the inauguration of the Equestrian Statue, it is important to point out that the first of these nine observations the Marquis of Pombal mentioned deals precisely with the growth of a new social group of new readers and new authors:

It is the first of the examples mentioned, the common nature of handwriting, because when, until the year 1750, it was rare for a person to write a letter with good

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prender a substancia das cousas, que s.m. não só tem inteiramente dissipado as trévas, e reparado as ruínas em que achou sepultados os seus reinos; mas que além disso tem feito aparecer outra vez em Portugal o seculo feliz dos senhores D. Manuel e D. João III” (Marquês de Pombal, *Op. Cit.*, p. 12, nosso itálico).

<sup>403</sup> Erika Fischer-Lichte, “Introduction”, in *The Routledge Introduction to Theatre and Performance Studies*, London/New York, Routledge, 2014, p. 164.

<sup>404</sup> Marquês de Pombal, *Op. Cit.*, p. 12.

handwriting. There is today, it seems, the same rarity of finding someone who writes badly in Lisbon so that every time you want to appoint a clerk to any of the accounts of the real treasury, the boards of the farm, the commerce, the general companies, and other public offices, almost entire reams of paper appear in memoirs and petitions for perfect letters (translated)<sup>405</sup>.

It is also a matter of presenting State officials as educated people, capable of reading, writing, and counting, given the previous lack of clerks or accountants. Significantly, 1750 works as pivotal year, that of D. José's new reign, but also that of the new minister. However, the inauguration also demonstrates, to believe the Marquis' words, a new literary society, which is immediately evaluated by the amount of prose and poetry submitted to the Royal Board of Censorship, implicitly referencing a Portuguese Golden Age (the 16<sup>th</sup> century, Discoveries) and a Dark Age (the 17<sup>th</sup> century, the Jesuit):

It is the fourth principle, that of the state of philosophy or of fine literature, which works as the basis for all sciences and for the multitude of prose and poetry that appear to the Board of Censorship, composed in Portuguese, Latin, Greek, Hebrew, and Arabic, with the purity of style and elegance of the centuries of Demosthenes, Homers, Tullios, Virgils, and Horacios, in Rome; and Teives, Andrades, Gouveias, Rezendes, Barros, Camões, and Bernardes in Portugal. They also demonstrated that these preparatory studies were no more flourishing at the time of the Jesuit invasion than they are today (translated)<sup>406</sup>.

Sebastião José indicates, right away, five very precise effects, which invariably seek the external effect of a wealth and power display. Once again, the first effect chosen refers to the one that intends to change the perception of Portugal by other nations. Therefore, the inauguration aimed to face the arrogance of the nations that considered us an "unable,

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<sup>405</sup> *Id., Ibid.*, pp. 12-13. "É o primeiro dos ditos exemplos, o caracter commum da letra de mão, pois quando até o anno de 1750, era rara a pessoa que escrevesse uma carta com boa letra, há hoje, parece, a mesma raridade de achar quem escreva mal em Lisboa, de sorte que de cada vez que se quer nomear um escriptorario para qualquer das contarias do real erário, das junctas da fazenda, da do commercio, das companhias geraes, e das outras repartições publicas aparecem quase resmas de papel inteiras em memoriães, e petições de letras perfeitissimas".

<sup>406</sup> *Id., Ibid.*, p. 14. "É o quarto princípio, o do estado da filosofia ou das bellas-lettras, que servem de base a todas as sciencias, e à multidão de prosas e de poesias que aparecem na Mesa Censória, compostas nas línguas portugueza, latina, grega, hebraica e arábica, com pureza de estylo e elegância dos séculos de Demóstenes, dos Homeros, dos Tullios, dos Virgílios, e dos Horacios, em Roma; e dos Teives, Andrades, Gouveias, Rezendes, Barros, Camões e Bernardes em Portugal. Também fizeram ver demonstrativamente que estes estudos preparatórios se não achavam mais florescentes no tempo da invasão dos jesuítas, do que hoje se acham".

rude or inert” nation<sup>407</sup> or “barbaric, fierce and unsociable”<sup>408</sup>. To do so, the strategy would be to show the vitality of a “mercantile body, which filled the royal square of commerce and the streets of Lisbon with radiance” (*ibidem*) and the harmony of a society in which different social classes coexisted without any interference:

[...] all those foreigners in line with this knowledge could not help but confess that we are much more sociable than they are, having seen, on the one hand, the different states, orders, classes, and superior associations of the capital of Lisbon in the most perfect harmony and reciprocal agreement, and in the smoothest consonance in the cabins and halls of assemblies and tables (translated)<sup>409</sup>.

As a liminal and festive event, the inauguration programmatically institutes its own almost utopian temporality and defines the transition of meanings and experiences that takes place between the court, subjects, social classes, spectators, and actors – “the liminal dimension is the precondition of the transformative dimension”<sup>410</sup>. The festivities overflow the public space of the square and are prolonged in the convivial space of the Lisbon elite, in the aristocratic and bourgeois house or even on the secular stage of the theater. They involve the entire nation, bringing together, as in a theater – in the same square, from the various architectural and social levels, from the farmyard to the balconies – a euphoric crowd of more than 150.000 people, of both sexes and of all classes<sup>411</sup>. The dialogue between the various arts attested to the intention of the total and perfect work. The printing of a libretto by Gaetano Martinelli entitled *L'Eroe Coronato*<sup>412</sup>, still today gives an account of the musical activities linked to the poetic compositions<sup>413</sup>. This symbolic dy-

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<sup>407</sup> *Id., Ibid.*, p. 19.

<sup>408</sup> *Id., Ibid.*, p. 20.

<sup>409</sup> *Id., Ibid.*, pp. 20-21. “[...] todos aqueles estrangeiros que se achavam neste conhecimento não puderam deixar de confessar que estamos muito mais sociáveis do que eles, tendo visto por uma parte os diferentes estados, ordens, classes, e grêmios de porte superior da capital de Lisboa na mais perfeita harmonia, e reciproco tracto, e na mais suave consonância nos camarotes, e salões das assembleias e das mezas”.

<sup>410</sup> Erika Fischer-Lichte, “Introduction”, in *The Routledge Introduction to Theatre and Performance Studies*, London/New York, Routledge, 2014, p. 174.

<sup>411</sup> Marquês de Pombal, *Op. Cit.*, pp. 20-21.

<sup>412</sup> *L'Eroe Coronato. Serenata per Musica da Cantarsi in Ocasione delle Pubbliche Feste per la Inaugurazione della Statua Equestre di S. M. Fedelissima D. Giuseppe I*, Lisbon, 1775.

<sup>413</sup> This intention does not go unnoticed by many poets who sing of the inauguration of the Equestrian Statue, including several foreigners, especially Italians. Many poetic or poetic-dramatic compositions refer to the eye of the “Foreigner” or the Portuguese who emigrated after the earthquake. An example is the anonymous sonnet “To the fair and much esteemed craftsman of the Equestrian Statue of His Majesty” (Book Collection of The National Library of Portugal, L 567/ 3 A, translated), the sonnet by Domingos Maximiano Torres, that begins with “Oh Pilgrim, who looks respectfully” (BNP, L 567/ 17 A, translated), or the “Dialogues in which the Magnificent Festivity with which the Splendorous Inauguration of the Equestrian Statue was celebrated is described [...] A Traveller and a Courtier are interlocutors”

dynamic results from the performativity of the various actions and meanings that converge in the celebrations. Production in a compulsive regime, when writing is asserted as the dominant technology of public communication<sup>414</sup>, it includes the proliferation of poetic compositions of all sorts, in classical and popular forms, for and against the statue and the excessive event of its inauguration. Yet, the poetics of praise dominates, from lyric to satire, from drama to hybrid compositions such as the aforementioned play *L'Eroe Coronato. Serenata per Musica da Cantarsi in Ocasione delle Pubbliche Feste per la Inaugurazione della Statua Equestre di S. M. Fedelissima D. Giuseppe I* (1775).

The inauguration party is not, therefore, a univocal festivity, like a ritualistic passage, structured in a linear way, being celebrated by many poets in this case and dedicated to various recipients more or less explicitly: the King, the Marquis of Pombal or his son, the Count of Oeiras, the author of the statue project, the sculptor Machado de Castro, or even the technician who cast the statue in bronze, Bartolomeu da Costa. There are certainly obvious indications of the financial dependence between protectors and protégés in these circumstantial relationships between the poets/artists and their patrons. Nonetheless, it is interesting to verify, even in this type of writing, the resurgence of a new type of actors and spectators. In fact, what concerns us in this reading is not so much the *archive* as heritage or the legacy of the written and artistic production of the time, but mostly the *repertoire* of texts, readings, and performative gestures practiced during the festivities<sup>415</sup>.

José Daniel Rodrigues da Costa, author of many string booklets “that in the Arsenal to the vague walker/ Are sold on horseback on a string”, can be credited for a text that clearly identifies *Praça do Comércio* as a scenic space, in a “*mise-en-abîme*” structure, in which the real event is confused with the theatrical event. Rodrigues da Costa writes that “the scene in the Great *Praça do Comércio*” (translated)<sup>416</sup>: indeed, includes a platform, balconies, cabins, arches, and curtains, and obviously the spectators, centered on that “ecstasy of the objects” they saw installed in the square or parading in front of them. A sensorial anticipation of the “atmosphere” is implicit – that to which G. Böhme refers in his essay on the aestheticization of the real<sup>417</sup>. The spectacle invades the body

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[by José Daniel Rodrigues da Costa] (BNL, L 1166// 16 A, translated). As a dramatic curiosity worthy of note is the publication of a five-act play in 1899, *A Inauguração da Estátua Equestre* [The Inauguration of the Equestrian Statue], by Joaquim da Costa Cascaes (BNP, L 3857// A).

<sup>414</sup> Fernando Matos Oliveira, *Poesia e Metromania. Inscrições Setecentistas (1750-1820)*, Coimbra, Faculdade de Letras da Universidade de Coimbra, 2008.

<sup>415</sup> Diana Taylor, *The Archive and the Repertoire. Performing Cultural Memory in the Americas*, Durham, Duke UP, 2003.

<sup>416</sup> José Daniel Rodrigues da Costa, *Diálogos em que se descreve o Magnífico Festejo com que se celebrou a Faustíssima Inauguração da Estátua Equestre [...] São Interlocutores hum Viajante e hum Cortesão* (BNL, L 1166 16 A), 1775, s.p.

<sup>417</sup> Gernot Böhme, *Atmosphäre. Essays zur neuen Ästhetik*, Frankfurt am Main, Suhrkamp, 1995, pp. 49-66.

of those who observe and comment on the statue: “For we are in the theater / In the most pleasant scene” (translated)<sup>418</sup>.

The event, therefore, encompasses a complexity that escapes the ritualist script from the outset, because the historical time of the end of the 18<sup>th</sup> century confronts us with a society undergoing a modernization and secularization process. In this context, signs of a public space emerge (the Public Promenade *Passeio Público* opens in 1760), along with a new civility that disputes the symbolic domain, in addition to the modes of representation and subjectivation.

Singing the inauguration of the colossal statue of the King in verse is also a sign of these extended relations between political power and “subjects”, a concept that is soon replaced with a broader one by revolutionary winds: that of “citizens”. Significantly, the modern style of statues, established from the renaissance imitation of this classic precept, became popular only in the 18<sup>th</sup> century with the affirmation of a bourgeois society. The range of spectators is ergo widened in the public square and so is that of the objects of public statuary. At the end of the Modern Age, the statue began to dignify not only soldiers or statesmen, but also scientists and artists. The moment of this generalization paradoxically coincides with the iconoclastic dispute over public statuary, as per some texts on the Equestrian Statue. As a well-known practice in Antiquity, the presence of the great ones in public spaces became common precisely in the second half of the 18<sup>th</sup> century, when the relationship between rulers and ruled was amplified.

To believe the words of the sculptor of the Equestrian Statue of D. José, Joaquim Machado de Castro (1732-1822), in the *Descrição Analytica da Execução da Estatua Equestre Erigida em Lisboa* [Analytic description of the execution of the Equestrian Statue erected in Lisbon], the public statue celebrates the present and not only the absent, as well as the art and the artist and not only its object. Indeed, the sculptor Machado de Castro begins by showing himself to be aware of the technical and philosophical usefulness of his own text: a technical and aesthetic description of the statue of D. José, unusual in Portugal, but not so rare in France or in other polite cultures<sup>419</sup>. The enumerative rhetoric, common in the laudatory writing of the time, led him to include a final “Catalogue” in his description, in which he counts some of the statues placed in public squares in the Enlightened Europe. Machado de Castro collected the information in the treatise by the French architect Pierre Matte (1723- 1814), which he quotes profusely: *Monumens érigés en France à la Gloire de Louis XV, Précédés d’un Tableau du Progrès des Arts et des Sciences sous ce Règne, ainsi que d’une Description des Honneurs et des Monumens de Gloire Accordés aux Grands Hommes, tant chez les Anciens, que chez les Modernes*, Paris, 1765.

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<sup>418</sup> José Daniel Rodrigues da Costa, *Op. Cit.*, s.p.

<sup>419</sup> José Machado de Castro, *Op. Cit.*, II.

In this *Analytic Description* from 1810<sup>420</sup>, Machado de Castro estimates that there are already 66 statues dedicated to great figures; however, he seems aware of the precariousness of the count, due to the iconoclastic impetus provoked by the Revolution of 1789 and by the “grudge” which marked the downfall of the many works that recalled Louis XIV and the Ancien Régime. One would not have to wait until the toppling of the statues that today, in the 21<sup>st</sup> century, celebrate colonial figures or heroes of dubious character. In fact, the politicization of statuary did not begin in the 18<sup>th</sup> century, but greatly increased throughout this period and seems to have generated a political movement of contestation, which is also manifested in toppling acts to the extent that it is not possible to discern how many and which ones persist: “All these Statues of France annihilated or extinguished by its Revolution; and, for this reason, it seems that one should speak of them in the past tense in an enumeration” (translated)<sup>421</sup>.

Let us not think, however, that this politicization of art does not occur with equal intensity in the arts of poetry. The ambiguity of Dedications of poetic compositions is also an example of time disputes. In the poems that celebrate the inauguration of the Equestrian Statue of D. José I, it is often difficult to discern the main object of the poet’s veneration from a political point of view: whether it venerates the King or the Marquis. Such conflicts are, nonetheless, far from being strictly political, as the authorship of the statue itself is also discussed, concerning whether it belongs to the one who designed it or the one who forged it. In reality, some praising poems end up valuing different things in art: either the idea underlying the statue or the technical work that gives it shape. Therefore, from an artistic point of view, a silent quarrel between the greatness of the designer Machado de Castro and the skill of the technician Bartolomeu da Costa is perceptible.

From the artistic point of view, the dispute is, ergo, between patrons and artists, theorists and practitioners, authors of the project or technical assistants. An anonymous poet, in a sonnet dedicated to Brigadier Bartolomeu Costa, divides his praises between the represented King and the military engineering applied to art, for which Bartolomeu Costa would have been responsible: “each one in his own state,/ You without a second, Him the King first”<sup>422</sup>. In turn, a poem by the sculptor Machado de Castro, who conceived and directed the foundry, contained some irony about the praise given to the technician Bar-

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<sup>420</sup> *Id.*, *Descrição Analytica da Execução da Estatua Equestre Erigida em Lisboa á Gloria do Senhor Rei Fidelissimo D. José I*, Lisboa, Impressão Régia, 1810.

<sup>421</sup> *Id.*, *Ibid.*, p. 326.

<sup>422</sup> “Ao formoso e muito estimável artífice da Estatua Equestre de Sua Magestade” (Coleção da Biblioteca Nacional de Portugal, L 567/ 3 A).



tolomeu da Costa: “[...] because I have more reasons to know the perfection with which the Foundry expresses everything that sculpture has done” (translated)<sup>423</sup>...

The Equestrian Statue of D. José I was the first in Portugal to be associated with this modern cult, a reason for the sculptor to congratulate himself on his personal achievement. His *Analytic Description* (1810) also tries to settle accounts with the process of the statue’s construction. The creator regrets the short time he had, the unprecedented and solitary nature of the undertaking, and even the physical absence of the King during the design of the statue – a circumstance that forces him to represent an absent body. He then regrets more explicitly the fact that, at the time, the person responsible for the *technical performance* of the foundry, Bartolomeu da Costa, deserved more recognition than his contribution as an artist in charge of the *aesthetic performance* of the work, for the movement of the horse, for the gesture of the rider, from the look to the bare hands that he ends up keeping. Indeed, the foundry act represented a technical challenge that led the Marquis of Pombal to personally attend the event at the Santa Clara Foundry. Machado de Castro disavows the literati who so wrongly assumed, in the thousands of encomiums written at the time of the celebration:

In the multitude of verses and some prose that will appear at the festive Inauguration of this Royal Statue, about this subject, many of their Authors will refer to our commendable Engineer, Statuary; thinking that this is the same as making it, and, therefore, praising him. I sympathize with the fact that those Literati were so solemnly mistaken; being led to this sorrow by the lack of knowledge of Arts and of drawing (translated)<sup>424</sup>.

Machado de Castro, when reporting the low quality of many of the statues in European cities, reaffirms the importance of ingenuity and art for the memorable dignity of the represented<sup>425</sup>. The statue he describes in successive chapters aspires to the status of

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<sup>423</sup> “[...] não devem os que eu proferir ter o menor lugar, porque tenho mais razões para conhecer o primor, com que a Fundação exprimio tudo quanto a escultura fez” (José Machado de Castro, *Op. Cit.*, 10n).

<sup>424</sup> “Na multidão de versos, e algumas prosas que apparecêrão na festiva Inauguração desta Real Estatua sobre este assumpto, muitos de seus Authores chamarão Estatuario ao nosso recomendável Engenheiro; cuidando ser isto o mesmo que fazella, e que deste modo o elogiavam. Eu me compadeço de se haverem enganado tão solenemente aqueles Literatos; sendo conduzidos a este pesar pela falta de conhecimento das Artes e do desenho” (*Id.*, *Ibid.*, p. 231).

<sup>425</sup> “This proves the care that must be taken by those who develop such gifts, regarding expenses and the choice of skillful Artists, so that monuments are acceptable; for if they are not, it results in contempt for the monuments themselves, and the forgetfulness (against what is intended) of the Heroes whom they represent” [In the original, “*Isto prova do cuidado que deve ter quem faz semelhantes obséquios, e despesas, em escolher Artistas hábeis, para que monumentos sejam atendíveis; pois que de não o serem, resulta o desprezo dos mesmos monumentos, e o esquecimento (contra o que se intenta) dos Heroes, que eles representam*”]. He also mentions that Alexandre Magno, “forbade, through an Edict, that anyone should portray him in Paint-

art. Therefore, ingenuity should triumph over matter so “that the bronze appears tender, and animated in a way that the imagination takes care of breathing, and moves both man and horse” (translated)<sup>426</sup>. Such praise for the art of drawing encompasses the casting technique itself, as it does other sciences and even other kinds of art. The encyclopedic character of Drawing (and of those who practice it) is immediately clear in the Prologue to the work that he published in 1788, *Discurso sobre as Utilidades do Desenho* [Discourse on the uses of Drawing], dedicated to Queen Maria. Before promoting Drawing as an art of the arts and sciences, useful for Anatomy, Medicine, Physics, Mathematics, Natural History, Civil or Military Architecture, Machado de Castro defends himself against the accusations of getting in someone else’s business, satirizing him, “saying that only material works or manuals are wanted from Artists, condemning me equally for loving the verses” (translated)<sup>427</sup>. However, he is proud of it all as his own, being all about Drawing and nothing about Eloquence.

The performative superiority of his artistic work shares the characteristics and different phases of what we now call the “creative process”. The sculptor Joaquim Machado studied, compared, sketched, and designed the several elements of his work. Over dozens of pages of the *Description*, he describes in detail how he got to the position of the horse, the outline of D. José’s body, the position of his bare hands, the direction of the gaze, even to the symbols to be included in the figures of its monumental base. Altogether, he intended to give his work the qualities of “Epic action”: “If Epic action must not only be great, but wonderful, useful, and interesting, for an Equestrian Statue, one must choose the ornate of these predicates that represents the most brilliant virtue of the Hero” (translated)<sup>428</sup>. The lexicon Machado de Castro used aspires to the “magic of Art” and to a “I don’t know what”, phrases that surely express the category of the “sublime” which, in this one and in other compositions on the subject, crosses the aesthetic thought of the 18<sup>th</sup> century. The ode Machado de Castro dedicated to the King in 1775 began precisely by stating that only enraptured was he allowed to deal with a “sublime subject” (translated)<sup>429</sup>.

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ing, with the exception of Apelles; nor should anyone carve him in bronze other than Lysippo” [In the original, “*prohibio por hum Edicto, que ninguém o retratasse em Pintura, à excepção de Apelles; nem o esculpisse em bronze outro que não fosse Lysippo*”] (*Id., Ibid.*, p. 323).

<sup>426</sup> “que o bronze pareça tenro, e de tal sorte animado, que a imaginação cuide ver-se respirar, e mover, tanto o homem, como o cavallo” (*Id., Ibid.*, p. 279).

<sup>427</sup> “dizendo que dos Artistas unicamente se querem as obras materiaes ou manuaes, condenando-me igualmente por amar os versos”. Joaquim Machado de Castro, *Discurso sobre as Utilidades do Desenho*, Lisboa, Off. Antonio Rodrigues Galhardo, 1788, s.p.

<sup>428</sup> “Se a ação Épica não só deve ser grande, porém maravilhosa, útil, e interessante, para huma Estatua Equestre, deve-se escolher a que ornada destes predicados represente a virtude mais brilhante do Heroe” (Castro, 1975: 8).

<sup>429</sup> Joaquim Machado de Castro, *Op. Cit.*, 1775, p. 3. Longino is quoted in the analytic description, and Joaquim Machado de Castro reproduces the neoclassical treatise, adapted to the well-known simile at-

In fact, the poets of the Equestrian Statue wrote many times under the fascination of a happy age, in which politicians practice the great art of making humanity merry: they rejoice because they sing happiness and not war for the first time. The poet Cruz e Silva believes that the beautiful Fantasy led Portugal to a Golden Age. The compositions symbolically signed by Antonio Alberto Paradis are especially detailed when he describes the table sets for the festivities, with paradisiacal food and drinks, on national silver tableware<sup>430</sup>. The table abundance and variety evoke all sorts of wealth and paradisiacal opulence of a kingdom that does not know hunger or lack<sup>431</sup>. Significantly, the rhetorical strategy of these practices was also explicitly mentioned by the Marquis of Pombal in his letter to the King. However, many poets saw the aesthetic issue of the inauguration as a manifestation of power/autonomy before foreign dominance. It is obvious, in the letter of the Marquis of Pombal to the King, this general rhetorical strategy: in a few pages, there are 38 references to the “foreigner”, to his superb and superior gaze, now avenged with the wealth display.

[These foreigners] who saw such an unprecedented costly colossus emerge in the center of that square. Who saw the Senate of the chamber give the public such costly and magnificent assemblies, in a hall so wide and so rich, and exquisitely garnished, the living had never seen before; but also an equally magnificent supper in another superb hall and decorated with exquisite taste and extraordinary cost, with ornaments made only for that function, without being of use for any other occasion one might intend: the table was served with great precision and delicacy of dishes for four hundred people, with copious national silver plate, without a single foreign piece entering; who saw the houses of the board of commerce also preciously decorated and in them another abundant silver plate and illuminated with a large number of candlesticks and serpentines of the same precious metal; who saw another respective superabundance of him in all the courts of the court

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tributed to Simónides de Cós, presenting painting and sculpture as silent poetry (*Id., Ibid.*, 3n and *Id., Descrição Analytica da Execução da Estatua Equestre Erigida em Lisboa á Gloria do Senhor Rei Fidelissimo D. José I*, afterword by José Augusto França, Lisboa, Academia Nacional de Belas Artes, 1975, p. 7). On the philosophical and technical bases of Machado de Castro, cf. José Fernandes Pereira, “As leituras de Machado de Castro”, *Arte Teoria*, n.º 9, 2000, pp. 7-25: <http://hdl.handle.net/10451/10395> (consulted online on November 10, 2022).

<sup>430</sup> Quotes from the anonymous ode that begins with “If until now you were” [1775], from the *Ode á Inauguração da Estatua Equestre* [Ode to the Inauguration of the Equestrian Statue], by António Dinis da Cruz e Silva [1775], and from the ode *Em louvor do grande dia da Inauguração da Estatua Equestre* [In Praise of the Great Day of the Inauguration of the Equestrian Statue], by Antonio Alberto Paradiz, three printed texts, included in the Portuguese National Library collection, respectively under the quota L 567//18 A, L 567//21 A e L 567//30 A.

<sup>431</sup> Cf. David A. Felismino, *Á mesa dos reis de Portugal. Ofícios, consumos, cerimónias e representações (Séculos XIII-XVIII)*, Lisboa, Temas e Debates/ Círculo dos Leitores, 2011.

in candlesticks, salvers, trays, and all the other pieces with which their respective refreshments were served; who saw the house of twenty-four, or the guilds of the manufacturing arts, make the same ostentatious expenditures in home ornaments, food, and silver services [...] (translated)<sup>432</sup>.

We must, however, add these forgotten poems about the Equestrian Statue present reflections not only on this tension between national and international powers, but also on those between the King and the Marquis. They are immediately evident in Machado de Castro's drawing: the placement of a medallion alluding to the Marquis of Pombal is noted at the base of the Equestrian Statue representing D. José, and the boldness does not go unnoticed by some poets from 1775. An anonymous sonnet dedicated to the Marquis even leaves an explicit reference to the irony of the composition: in the statue of D. José, "[...] here I also see Your Memory/ Submitted to the Monarch, and this sounds,/ You hold his throne (oh notorious voice)". A few years later, in 1777, when the Marquis of Pombal fell into political disgrace, the opening of a sonnet that integrates the anti-Pombaline lyric (which circulates as profusely as that of the Equestrian Statue) calls for the removal of the medallion: "Sir, to exalt our blessed / Take off the Pedestal of the Augustan Statue / The ugly and robust image of the Marquis, / Which, when one sees it still at his feet, excites hatred" (translated)<sup>433</sup>. The dysphoric annotation is also verified in reports such as that of an "eyewitness", who responds to the official disposition of the *Narração dos applauzos* [Applause narration] with the "true narration" that the preface of the 1938 edition<sup>434</sup> mentions as a subtitle ("À Inauguração"). Here we can read, for instance, that the inauguration costs would be infinite: "How much this Representation costs, there are

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<sup>432</sup> "[Esses estrangeiros] que viram erigir no centro da referida praça um tão custoso, e nunca até agora visto colosso. Que viram o senado da câmara dar ao publico umas tao custosas, e magnificas assembleias, em um salão tão amplo e tão rico, e primorosamente guarnecido, qual nunca tinham visto os viventes; mas também uma igualmente magnifica ceia em outro salão soberbo e decorado com exquisito gosto, e extraordinário custo, com ornamentos feitos somente para aquella função, sem que possam ser de uso para outra alguma que se intente fazer: sendo a meza servida com grande exactidão e delicadeza de pratos para quatrocentas pessoas, com copiosíssima baixella de prata nacional, sem entrar nem uma só peça de estrangeiros; que viram as casas da junta do commercio também preciosamente ornadas e nellas outra abundante baixella de prata e alumiada com grande numero de castiças e serpentinas do mesmo precioso metal; que viram outra respectiva superabundância delle em todos os tribunaes da corte em castiças, salvas, bandejas, e todas as mais peças com que foram servidos os seus respectivos refrescos; que viram a casa dos vinte e quatro, ou dos grêmios das artes fabris, fazer as mesmas aparatosas despezas em ornamento de casas, comidas, e serviços de prata [...]", Marquês de Pombal, *Op. Cit.*, p. 18.

<sup>433</sup> "Senhor, para exaltar a nossa dita / Tirai do Pedestal da Estátua Augusta / A imagem do Marquês feia e robusta, / Que ao vê-la ainda a seus pés o ódio excita", Alberto Pimenta, *Musa Anti-Pombalina*, Lisbon, A Regra do Jogo, 1982, p. 54.

<sup>434</sup> À Inauguração da Estátua Equestre de El-Rei D. José. Narração Verídica Feita por Um Jesuíta, Testemunha Ocular do Acontecimento, preface and notes Ângelo Pereira, Lisboa Editorial Labor, 1938.

no expressions that explain it well, nor numbers that enumerate it [...]. He took despotic money from wherever he was told he had it” (translated)<sup>435</sup>.

The construction of the Equestrian Statue was thus marked by a relevant set of political, material, and aesthetic tribulations: the structuring of the social and cultural event of its inauguration expanded the performativity of this historical episode in detail. One can get a better idea of the “staging process” of the festivities based on the reading of a document with a revealing title: a *Narração dos aplauzos com que o juiz do povo e casa dos vinte-quatro festeja a felicissima inauguração da Estatua Equestre. Onde também de Expoem as Alegorias dos Carros, Figuras, e tudo o mais concernente ás ditas Festas* [Narration of the applause with which the judge of Lisbon and the house of the twenty-four celebrate the most blissful inauguration of the Equestrian Statue. Where also the Allegories of the Floats, Figures, and everything else concerning the said Festivities are exhibited] (1775). In the opening chapter, the “seven majestic floats” that paraded in the festivities are described. The first four represented the four best-known parts of the Earth (Europe, Asia, Africa, and America), symbolizing the power of the Empire and the universal homage paid to the Portuguese King. The description of the car of Africa is a cultural compendium of possession and subjection, enunciated as an imperial performance:

The third Float represents Africa, where our King is known and respected in the most uncultured Regions, for the vast Domains he possesses there, and singular love, and justice, which under his Government those Barbarians experience [...]. On the bow sits a black Kaffir, hugged with an ivory tooth, as a sign of the productions and tributes of that continent, and there are ten instrumentalist musicians and ten masked dancers inside the float, dressed pompously in the African style. In the stern, there is an Elephant, symbol of Africa, and this one is seated on it in some Antilles, which is represented in a Black Lady, with wild hair, almost naked, with an Elephant’s head for a helmet, earrings in her ears (translated)<sup>436</sup>.

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<sup>435</sup> “Quanto custou esta Representação, nem há expressões que bem o expliquem, nem algarismo que o enumerem [...]. Sacou despótico dinheiro de toda a parte onde lhe constou que o havia” (*Id., Ibid.*, p. 18).

<sup>436</sup> “O terceiro Carro representa a Africa, onde o nosso Reyhe conhecido, e respeitado nas mais incultas Regiões, pelos dilatados Dominios, que allipossue, e singular amor, e justiça, que debaixo do seu Governo experimentam aquelles Barbaros [...]. Sobre a prôa vai sentado hum Cafre negro, abraçado com um dente de marfim, em sinal das producção, e tributos daquele Continente, e dentro do Carro dez Musicos instrumentistas, e dez Dançarinos mascarados, vestidos pomposamente à Africana. Na popa se vê hum Elefante, symbolo da Africa, e esta esta sobre elle sentada em humas andilhas, a qual se representa em huma Dama de côr preta, cabelo revoltado, quase nua, com huma cabeça de Elefante por capacete, arrecadas nas orelhas”, *Narração dos Aplauzos com que o Juiz do Povo e Casa dos Vinte-Quatro Festeja a Felicissima Inauguração da Estatua Equestre onde tambem se Expõem as Alegorias dos Carros, Figuras, e Tudo o mais Concernente ás Ditas Festas*, Lisboa, Royal Officina Typographica, [1775], pp. 9-10.

After the floats of Apollo and Oceanus, the parade ends significantly with a float representing a Triumphant Portugal. The description of each of the seven floats illustrates how they are presented in the *Praça do Comércio* as true stage machines, hosting an enormous number of figures, props, visual, and sound effects, and other technical devices. The parade of the four floats, with details on the fauna and flora of each part of the world, would resemble a small Universal Exhibition. As there is no place here for its exhaustive description, one can see the example of the float dedicated to Europe: “One sees a boisterous horse over the prow of the Float: ten instrumentalist Musicians and the same number of Dancers, all in costumes, richly dressed inside of it” (translated)<sup>437</sup>. The spectacularism of the allegories that saturate the seven floats is initially evident in the language. The one dedicated to the Ocean shows “a thirtyish of stout stature with half a man’s body and half a mermaid’s, and with two tails full of shells” (translated)<sup>438</sup>. In the float dedicated to Triumphant Portugal, on the other hand, “a furibund man with a terrible aspect represents the Furor” (translated)<sup>439</sup>. The vehicle is “golden, and its wheel spokes imitate flames”<sup>440</sup>. The same document presents a section dedicated to the “*Regulação das Danças Que acompanharam os Carros e seus vestuários*” [Regulation of Dances that accompanied the Floats and their costumes]<sup>441</sup>, in which the movements, costumes, and colors of the different costumes are enumerated in detail. The text also includes the inauguration choreography in the section entitled “*Descrição da Ordem, em que hão de marchar os Carros, e Dançar para a Praça do Commercio*” [Description of the Order in which the Floats will march, and Dance to *Praça do Comércio*]<sup>442</sup>. The parade of floats and other figures formally stops next to the statue for the spectacular production of a bow to King D. José, leaving after this gesture, under a “continued symphony” (translated)<sup>443</sup>. The feast and the many delicacies are the corollary of these actions, followed by dances and counter-dances, which only “end at dawn” – movements repeated for another 2 days. Immediately before the feast, at eight o’clock in the afternoon of the June 6, after listening to a sonata, the Judge of the People reads a “gratulatory prayer” (translated)<sup>444</sup>. The latte is proceeded by verse readings the clerk and two deputies from the House of Twenty-Four conduct. The verses heard at the moment of the inauguration constitute, however, a very small part of the written produc-

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<sup>437</sup> *Id. Ibid.*, p. 5.

<sup>438</sup> *Id. Ibid.*, p. 16.

<sup>439</sup> *Id. Ibid.*, p. 21.

<sup>440</sup> *Id. Ibid.*, p. 23.

<sup>441</sup> *Id. Ibid.*, pp. 24-25.

<sup>442</sup> *Id. Ibid.*, pp. 26-28.

<sup>443</sup> *Id. Ibid.*, p. 29.

<sup>444</sup> *Id. Ibid.*, p. 30.

tion and the reading of verses. It is enough to remember that, from the Float of Apollo, which carried poets and musicians, verses continually flowed:

In the lower part of the float there will be six openings, from which verses of every existent quality will be thrown down the Streets and Squares. And from each of the other floats, their respective Allegories and Explanations will be thrown in the same way (translated)<sup>445</sup>.

Therefore, there is a remarkable homology between the persuasion that Goffman attributes to social performance<sup>446</sup> and the inauguration of the statue as a major device of self-representation, suggesting not only King D. José I, but a new urban conception for the city of Lisbon and the symbolic projection of its authoritarian rule. The compositions on the Equestrian Statue very often recorded the memorable impression of the event. The very absence of the King at the inauguration of his statue (today paradoxical) seems to stimulate the imagination of royal power<sup>447</sup>. Indeed, the fact that the statue was completely covered by a red curtain seems to have increased the emotion of seeing it finally discovered, as per a sonnet by Manuel Coelho de Carvalho entitled “*Sentimentos de hum espectador, que chega a admirar a estatua equestre*” [Feelings of a spectator, who comes to admire the Equestrian Statue]<sup>448</sup>. An anonymous print, *Carta ou Narração Conciza da festividade feita na Cidade de Lisboa na Collocação da Estatua Equestre* [Letter or Short Narration of the festivity held in the City of Lisbon at the Inauguration of the Equestrian Statue], also refers to the emotion of the first moments, when the Marquis of Pombal and the Count of Oeiras “will make the hearts flutter with excitement”, “[...] discovering that majestic

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<sup>445</sup> “Pela banda de baixo do carro haverá seis janelas, donde se irão deitando pellas Ruas e Praças toda a qualidade de versos que houver. E de cada hum de todos os outros carros se irão da mesma forma deitando as respectivas Allegorias, e Explicações”, *Id. Ibid.*, pp. 16-17.

<sup>446</sup> “A performance may be defined by all the activity of a given participant on a given occasion which serves to influence in any way any of the other participants”, Goffman, *apud* Richard Schechner, *Performance Studies*, New York, Routledge, 2006, p. 29).

<sup>447</sup> Miguel Figueira de Faria, “A estátua equestre: In *Absentia Principis* e o Rei Escondido”, in *Do Terreiro do Paço à Praça do Comércio: História de Um Espaço Urbano*, Lisboa, INCM/UAL, 2012, pp. 157-227. As we do not wish to present an extensive bibliography on the specificity of representations of power in the Ancien Régime, we reckon the importance of referring here to some studies on the symbolization of power in the absence of the body. Among the abundant existing bibliography, the investigations of Sergio Bertelli are fundamental (*Il Corpo Del Re. Sacralità Del potere nell’Europa medievale e moderna*, Firenze, Ponte Alle Grazie, 1995) or Roger Chartier (*A História Cultural. Entre práticas e representações*, Lisboa, Difel, 1990); in addition to the primary studies of Marc Bloch (*Les Rois Thaumaturges. Étude sur le caractère surnaturel attribué à la puissance royale, particulièrement en France et en Angleterre*, Paris, Armand Colin, 1961), Norbert Elias (*A Sociedade de Corte. Uma sociologia da realeza*, Lisboa, Estampa, 1987) or Ernst Kantorowitz (*Les Deux Corps du Roi*, Paris, Gallimard, 1989, ed. pr. 1957).

<sup>448</sup> Manuel Coelho de Carvalho, “*Sentimentos de hum espectador, que chega a admirar a estatua equestre*”, Lisboa: s.n., 1775.

artefact”, leaving the admiration for the “uniqueness of the object” suspended for a long time (translated)<sup>449</sup>.

An indelible *sensiblerie* takes care of many other compositions. The author of the *Letter* exemplifies the Applause, also describing the happy feeling left by the lamps that were turned on at night, the dances until dawn, the relaxed presence of the ladies at the windows, or the children who hugged each other in a continuous uproar. The information is confirmed by another description, that of Jacinto Saldanha: he, too, celebrates the unusual “greatness of the apparatus” and assures that the spontaneous acclamations of the spectators were often interrupted by sincere tears that well showed the happiness and pleasure of the crowd<sup>450</sup>.

Among the many compositions for the Equestrian Statue, it is our contend that this text by Jacinto Saldanha should be read more carefully, with a political venom barely disguised by the sweetness of the praise. Unlike the others, it dates to 1776, perhaps already from that time when the illness and near death of King José I foreshadowed the exile of the Marquis of Pombal and the partial destruction of his political project, when “things fell apart”, in the words of a courtesan (translated)<sup>451</sup>. Jacinto Saldanha calls for a new reflection, which also considers the individual conscience and not only collective practices, to be used in conversations, classes, or academies<sup>452</sup>. For their effectiveness, the poems of 1775 are useless and insufficient in 1776:

The public actions that have shown excessive pleasure in the acclamations of our Sovereign are now complete [...]. Poetry is no more capable, no more worthy of such lofty matters (translated)<sup>453</sup>.

It is now a question of preserving what the Pombaline period kept as memorable: the appreciation for manual work, the interest in commercial activity, the reform of education that goes beyond erudition, the usefulness of a standing army that could guarantee

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<sup>449</sup>*Carta ou Narração Conciza da festividade feita na Cidade de Lisboa na Collocação da Estatua Equestre*, Lisboa, Off. Antonio Rodrigues Galhardo, 1775, p. 4, included in the Portuguese National Library collection, respectively under the quota L 3344//1 A.

<sup>450</sup>Jacinto Ignacio Rebello Saldanha, *Breve Discurso em que se Fez Huma Sucinta Reflexão nas Obrigacoens Imensas de que os Vassalos de Portugal São Devedores ao Seu Soberano e ao Excellentissimo Marquez de Pombal, Seu Primeiro Ministro, Dirigido aos Habitantes de Lisboa, na Occazião de lhe Haverem Levantado Huma Estatua Colossal Equestre em Testemunho de Reconhecimento e Gratidão*, Lisboa, Off. Jorge de Aquino Bulhoens, 1776, p. 25.

<sup>451</sup>M. Luísa Malato Borralho, “*Por Acazo Hum Viajante...*”: *A Vida e a Obra de Catarina de Lencastre. 1.<sup>a</sup> Viscondessa de Balsemão*, Lisboa, INCM, 2008, p. 74.

<sup>452</sup>Jacinto Ignacio Rebello Saldanha, *Op. Cit.*, p. 5.

<sup>453</sup>“Estão já completas as acçoens publicas que tem demonstrado o vosso excessivo prazer nas aclamações do nosso Soberano [...]. Não he a Poezia mais capaz, não he mais digna de assumptos tão elevados” (*Id., Ibid.*).



peace to a new civility. These are the pillars for a fairer world. It reminds him of some of the legislation that remained, still incomplete in terms of design, such as the Decree of December 19, 1761, which abolished slaves in mainland Portugal. It was then discovered that perpetual slavery is a punishment for the innocent worse than death that can only be instituted by the law of Force and never that of Reason.

I am confused, I am frightened by the little I have said and how much I have left to say [...] In this happy time, it is known that Vassals must not be slaves (translated)<sup>454</sup>.

Saldanha ends up praying for the health of the King, whose sick body was evidence that the actions of the Marquis of Pombal could have no sequel: consequently, he considers the circumstantial poems of 1775 as an illusion that blinds the spectator. And when we read them in this way, listening to a swan song in them, we cannot help but consider them very little circumstantial.

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<sup>454</sup> “Confundo-me, atemorizo-me vendo o pouco que tenho dito, e o muito que me falta que dizer [...] Neste feliz tempo se conhece que os Vassallos não devem ser escravos” (*Id., Ibid.*, pp. 14-15).

# MARQUIS OF POMBAL, HERALD OF THE SECOND (BRAZILIAN) EMPIRE?

JEAN PIERRE CHAUVIN<sup>455</sup>

*Putting people of distinction in these villages has given me great care*  
(Francisco Xavier de Mendonça Furtado)<sup>456</sup>

*It would be a big mistake to all the principles of pragmatic Historiography  
if the forces of indigenous peoples and imported blacks were despised*  
(Karl von Martius)<sup>457</sup>

## REAR PROJECTION

The Brazil we assume we know is also the result of a set of discourse(s). The history of the country goes beyond thinking about the territory, which was the Island of Vera Cruz, Land of Santa Cruz, and the name of a commodity. Since the beginning of the 16<sup>th</sup> century, this past is indelibly marked by the occupation of different places under diverse modalities by native peoples, deceived by foreigners specialized in the plundering of lands first denominated “Parts” of Brazil. Later they were named “States” of the Portuguese Crown, “Homeland” and, finally, “Nation” – in theory, modern, sovereign, and independent.

Fortunately, the studies of Alan Manchester<sup>458</sup>, Nelson Werneck Sodré<sup>459</sup>, and H. E. S. Fisher<sup>460</sup> revealed, with plenty of evidence, the information which part of Brazilian historiography still does not know or pretends it is not important. The political independence,

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<sup>456</sup> Letter from the Governor and Captain-General of the Grão-Pará and Maranhão state to the Secretary of D. José I on November 22, 1755, M. C. de Mendonça, *A Amazônia na Era Pombalina*, tome III, Brasília, Edições do Senado Federal, 2005, p. 54, translated from Portuguese. Original version of the quote: “*O pôr gente de distinção nestas vilas me tem dado um grandíssimo cuidado*”.

<sup>457</sup> From the work “Como se deve escrever a História do Brasil”, *Revista de História de América*, n.º 42, 1956, p. 442, translated from Portuguese. I am very grateful to Patrícia Valim for recommending the reading of this essay by Karl von Martius – discussed below. Original version of the quote: “*Seria um grande erro para com todos os princípios da Historiografia pragmática, se se desprezassem as forças dos indígenas e negros importados*”.

<sup>458</sup> A. K. Manchester, *Preeminência Inglesa no Brasil*, translation Janaína Amado, São Paulo, Brasiliense, 1973.

<sup>459</sup> N. W. Sodré, *As Razões da Independência*, 2<sup>nd</sup> ed., Rio de Janeiro, Civilização Brasileira, 1969.

<sup>460</sup> H. E. S. Fisher, *De Methuen a Pombal: O Comércio Anglo-Português de 1700 a 1770*, translation Joaquim Duarte Peixoto, Lisboa, Gradiva, 1984.

proclaimed in 1822, is a controversial issue and would require careful reflection, as it also concerns ambivalence found in historiography about a country that, until very recently, was discussing a Brazilian identity (or its projection, depending on stakeholders). In this regard, a notable inflection point can be seen in *Brasil: mito Fundador e Sociedade Autoritária* [Brazil: founding myth and authoritarian society], an authentic counterpoint to the celebration of five hundred years of the country's history. Its author, Marilena Chaui (translated from Portuguese), observes that:

From the 18<sup>th</sup> century onwards, given the North American, Dutch, and French revolutions, “homeland” came to mean the territory whose master is the people organized as an independent State. Therefore, in the independence uprisings that took place in Brazil at the end of the 18<sup>th</sup> century and the beginning of the 19<sup>th</sup> century, the insurgents spoke of “Minas homeland”, “Pernambuco homeland”, and “American homeland”. Finally, with the Patriarch of Independence, José Bonifácio, people started talking about the “Brazilian homeland”. During all this time, “nation” was used only for Indians, blacks, and Jews<sup>461</sup>.

Areas of knowledge such as languages and literature, history, and geography have been activated since the 1830s to provide credibility to the discursive constitution of national memory. A prelude of this scenario happened in 1826, when Ferdinand Denis wrote his history of Brazilian literature, and Almeida Garrett defended the replacement of European models with a hero who would represent the spirit and coloring of the New World. Hence the election of the indigenous person as an apparent national symbol, both through literature and history.

As it is widely known, Denis' and Garrett's recommendations had a significant impact on the first ideologues of the Brazilian Nation. In 1836, a group of young people edited two issues of the *Revista Niterói*. Gonçalves de Magalhães and Araújo Porto Alegre, who had been circulating in Paris for some years, led this movement. They published a series of works, such as *Suspiros Poéticos e Saudades* [Poetic Sighs and Longings], which, among other things, thematized the virtues of indigenous people and linked their image to the composition of poetry with nationalizing content.

These (theoretically patriotic) gestures celebrated in Paris precede a series of measures the representatives of the Brazilian Regency and Empire adopted. The aim of these un-

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<sup>461</sup> “A partir do século XVIII, com as revoluções norte-americana, holandesa e francesa, ‘pátria’ passa a significar o território cujo senhor é o povo organizado sob a forma de Estado independente. Eis por que, nas revoltas de independência, ocorridas no Brasil nos finais do século XVIII e início do século XIX, os revoltosos falavam em ‘pátria mineira’, ‘pátria pernambucana’, ‘pátria americana’; finalmente, com o Patriarca da Independência, José Bonifácio, passou-se a falar em ‘pátria brasileira’. Durante todo esse tempo, ‘nação’ continuava usada apenas para os índios, os negros e os judeus”, Marilena Chaui, *Brasil: Mito Fundador e Sociedade Autoritária*, Fundação Perseu Abramo, s.l., 2000, p. 16.

dertakings was to manufacture a memory of what came to be a positive version of Brazilian history, designed to give consistency to the civilizing project<sup>462</sup>. In 1972, Maria de Lourdes Haidar carried out one of the first studies to rescue such episodes underlying the national memory. She recalled that:

Through the Decree of December 2, 1837, the Saint Joachim Seminary, the former Saint Peter Orphans Seminary, was converted into the model secondary school which was named after *Pedro II* as a tribute to the future emperor. The Saint Peter Orphans College dated back to colonial times (translated)<sup>463</sup>.

Another decisive study to better understand the establishment of the nationalist discourse from the late 1830s is that of Lucia Maria Paschoal Guimarães (*Debaixo da imediata proteção imperial* [Under the immediate imperial protection]). It is the result of her doctoral dissertation, published by *Revista do IHGB* in 1995. The researcher stressed that:

Amid many institutional crises and news of uprisings that shook the country, the Court of Rio de Janeiro witnessed the installation of two important National Memory centers during 1838. The first, the Public Archive, was created on January 2 of that year by act of the Minister Bernardo Pereira de Vasconcellos. The second, the Brazilian Historical and Geographical Institute, was created months later, on October 21. It was a private enterprise sponsored by the Helping Society [*Sociedade Auxiliadora*, in Portuguese], due to Marshal Raymundo José da Cunha Mattos and the Canon Januário da Cunha Barbosa. They both justified the new institution on the grounds

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<sup>462</sup> “In their effort to maintain Order and spread Civilization, the imperial rulers forged institutions, copied others, created a body of laws, endeavored to spread the Enlightenment. Like the ‘Civilized Nations’, they emphasized the organization of Public Instruction [...] The first regulation of the College [Pedro II], published in 1838, followed the French model, determining simultaneous and serial studies, because until then the Secondary education in the Court was organized in separate classes” (translated), S. R. de Mattos, *O Brasil em Lições: A História como Disciplina Escolar em Joaquim Manuel de Macedo*, Rio de Janeiro, Access, 2000, pp. 33 e 43. “The teaching of Brazilian History is closely related to Pedro II College, an institution created as an official secondary education establishment to meet the training needs of a social elite, to which the Empire’s civilizing project was especially directed. [...] The discipline of History had an important role in the consolidation of the National State by contributing to forge a Brazilian nationality” (translated), B. B. M. dos Santos, *O Currículo da Disciplina Escolar História no Colégio Pedro II – A Década de 1970 – Entre a Tradição Acadêmica e a Tradição Pedagógica: A História e os Estudos Sociais*, Rio de Janeiro, Mauad/Faperj, 2011, p. 51.

<sup>463</sup> “Por Decreto de 2 de dezembro de 1837, converteu-se o Seminário de São Joaquim, antigo Seminário dos Órfãos de São Pedro, no modelar colégio de instrução secundária que, numa homenagem ao futuro imperador, recebeu o nome de Pedro II. O Colégio dos Órfãos de São Pedro datava dos tempos coloniais”, Maria de Lourdes Mariotto Haidar, **O Ensino Secundário no Brasil Império**, 2<sup>nd</sup> ed., São Paulo, Edusp, 2008 [1972], p. 96.

of its pedagogical character, given that it sought to “provide great assistance to public administration and the enlightenment of every Brazilian” (translated)<sup>464</sup>.

If one accepts the hypothesis that the conception of Brazil was linked to the biased reconstitution of its past, one should remember that certain historiography obeys specific perspectives and resorts to methods of persuasion to sensitize the readers. In our case, a conglomerate of intellectuals undertook the task, supporting the Brazilian Historical and Geographical Institute (IHGB) ideologically and financially. Valdei Lopes de Araújo points out that:

Despite admitting that it was a collective task, Cunha Barbosa did not hesitate to establish, from the beginning, the writing of a General History as one of the central objectives of the IHGB. Like the “Reborn Academics Society” [*Sociedade dos Acadêmicos Renascidos*, in Portuguese], it was a collective and coordinated enterprise, more than a gesture of individual authorship. Given the division of Brazil’s history into periods, it would be easier to coordinate the work of the different members. Therefore, the initial effort was to define the limits of each period and the main facts to be reported. The main point was that the program of a General History presupposed a historical totality (translated)<sup>465</sup>.

## POMBALISM

The 5<sup>th</sup> revised and updated edition of *História do Brasil*, by José Francisco de Rocha Pombo (1857-1933), published in 1948, contains an unidentified “Preface” that praises the author’s “work”, “modesty”, and his “love for the truth”. At a certain point, the reader

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<sup>464</sup> “Em meio a tantas crises institucionais e às notícias de revoltas que agitavam o país, a Corte do Rio de Janeiro assistiu, no decorrer de 1838, à instalação de dois importantes centros da Memória Nacional. O primeiro, o Arquivo Público, criado em 2 de janeiro daquele ano, por ato do Ministro Bernardo Pereira de Vasconcellos. O segundo, o Instituto Histórico e Geográfico Brasileiro, constituído meses mais tarde, em 21 de outubro, tratava-se de um empreendimento de caráter privado, que contava com o patrocínio da Sociedade Auxiliadora, por iniciativa do Marechal Raymundo José da Cunha Mattos e o Cônego Januário da Cunha Barbosa, que justificavam a nova instituição alegando o seu caráter pedagógico, posto que se destinava a “ministrar grandes auxílios à administração pública e ao esclarecimento de todos os brasileiros”, L. M. P. Guimarães, *Debaixo da Imediata Proteção Imperial: Instituto Histórico e Geográfico Brasileiro (1838-1889)*, 2<sup>nd</sup> ed., São Paulo, Annablume, 2011, p. 33.

<sup>465</sup> “Mesmo admitindo tratar-se de uma tarefa coletiva, Cunha Barbosa não hesitou em estabelecer, desde o início, a escrita de uma História Geral como um dos objetivos centrais do IHGB. Como na ‘Sociedade dos Acadêmicos Renascidos’, tratava-se de um empreendimento coletivo e coordenado, mais do que um gesto de autoria individual. Dividida a história do Brasil em épocas, ficaria mais fácil coordenar o trabalho dos diversos membros. Por isso, o esforço inicial era definir os limites de cada época e os fatos principais a serem relatados. O fundamental era que o programa de uma História Geral partia do pressuposto da preexistência de uma totalidade histórica”, V. L. de Araújo, *A Experiência do Tempo: Conceitos e Narrativas na Formação Nacional Brasileira (1813-1845)*, São Paulo, Aderaldo & Rothschild, 2008, p. 176.

finds a subchapter entitled “*A obra do Marquês de Pombal*” [The work of the Marquis of Pombal], which includes nearly anecdotal statements: “D. José I was a perfectly mediocre creature, completely incapable of action, and only having a taste for pleasures and shady adventures. He was thankful when he found a man to whom he could give the kingdom” (translated)<sup>466</sup>.

That is to say, the premises announced in the paratext reaffirmed the author’s commitment and the veracity of the book’s content; however, the section dedicated to Pombal repeated a set of questionable hypotheses that trace back to the beginning of the 19<sup>th</sup> century in the country. Apart from that, the praise for the Prime Minister’s skill and energetic character implied the erasure of the King and attributed to him an at least debatable posture. José I’s supposed lethargy and devotion contrasted with the dynamism and strength of the Secretary of the Kingdom. The latter had supposedly assumed the virtual command of the Crown since he was put to the test on the occasion of the Lisbon earthquake of 1755.

The historian is supported by tradition and affiliated with the *auctoritas* of the genre in which he writes his version of events. Based on the ideas of the English historian Robert Southey, Rocha Pombo maintained that “[Pombal] possessed a high dose of the national pride that distinguishes the Portuguese and had robust faith in his own talents and strength of character” (translated)<sup>467</sup>. The author attenuated the irascible temperament and the despotic character of the Minister’s actions, privileging his deeds and exempting him from the controversies that surrounded his name and jeopardized his image, as if he were a man of stainless steel, pondered in the proceed.

This condescending vision of Sebastião José – titrated Count of Oeiras in 1759 and Marquis of Pombal in 1769 – was the trademark of a conception that guided the textbooks produced in Brazil between the mid-19<sup>th</sup> century and the second half of the 20<sup>th</sup> century. This is clearly seen in the *Compêndio da História do Brasil* [Compendium of Brazilian History], by General Abreu e Lima, published in 1843:

Despite what is attributed to Pombal, he was no less susceptible to conceiving great ideas, maturely laying out vast plans, and hastening their completion. He reestablished trade and, in this respect, Portugal owed him real advantages. This Minister, a man of State, did not hesitate to openly attack the shameful treaties concluded with England [...] (translated)<sup>468</sup>.

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<sup>466</sup> F. Rocha Pombo, *História do Brasil (com Muitos Mapas Históricos e Gravuras Explicativas)*, São Paulo, Melhoramentos, 1925, p. 307.

<sup>467</sup> *Id., Ibid.*, p. 309.

<sup>468</sup> “Apesar do quanto se imputa a Pombal, não era ele menos suscetível de conceber grandes ideias, de dispor com madureza vastos planos e de apressar a conclusão deles. Restabeleceu o comércio e a este respeito lhe deveu Portugal vantagens reais. Este Ministro, homem de Estado, não hesitou em atacar às

With slight variations, this discourse shaped the manuals published decades later, always validating the decisions at the behest of Pombal. One can observe that in the *Compêndio de História do Brasil* [Compendium Brazilian History], by Father Raphael Galanti, published in 1896, specifically in the opposition between the interests of the Jesuits and the Portuguese Crown:

Later, however, the same authors claim that the ambitious and greedy successors of these apostles [Jesuits] reluctantly began to protect the Indians, going so far as to tell them that the land was theirs! Therefore, they offended the settlers whose interests they harmed, deserving to be expelled in the end by the Marquis of Pombal. Consequently, it seems to us that, to better access the true history, one needs to study with some diligence the life of the first missionaries in our country, pondering their relations with the Indians and the settlers (translated)<sup>469</sup>.

The general praised Pombal's actions to rid the Crown from the English yoke – “Pombal made Brazil flourish through wise regulations and by vivifying commerce” (translated)<sup>470</sup>. Meanwhile, the priest justified the expulsion of the Society of Jesus on the grounds of a supposedly symmetrical alliance between indigenous people and Jesuits. Separated by 53 years, in both publications, historians reiterated that their reports were guided by the truth of the facts. Evidently, they were not exempt manuals, because both filed arguments with the aim of persuading the consultant about the economic benefits and civilizing virtues catalyzed by the Prime Minister of D. José I.

This early boastful trajectory was attributed to the country through textbooks for over a century and a half. It probably crystallized the often positive image of Pombal, who went from being a Portuguese symbol to a kind of anticipated Brazilian patriarch. It would not be too much to remember that Brazil did not exist as a nation<sup>471</sup> before 1822, as several

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claras os vergonhosos tratados concluídos com a Inglaterra [...]”, J. I. de Abreu e Lima, *Compêndio da História do Brasil (com Retratos)*, 2 tomes, Rio de Janeiro, Eduardo e Henrique Laemmert, 1843, pp. 234-235.

<sup>469</sup> “Mais tarde, porém, afirmam os mesmos autores, arrastados, os sucessores desses apóstolos [jesuítas], pela ambição e cobiça, começaram a proteger os índios, chegando até ao excesso de lhes dizer que a terra era deles! Ofenderam deste modo os colonos cujos interesses prejudicavam, merecendo afinal serem expulsos pelo marquês de Pombal. Parece-nos, por conseguinte, do maior alcance para a história verdadeira estudar com alguma diligência a vida dos primeiros missionários do nosso país ponderando suas relações com os índios e os colonos”, R. M. Galanti, *Compêndio de História do Brasil*, 3<sup>rd</sup> ed., tome I, São Paulo, Typographia da Industrial, 1896.

<sup>470</sup> J. I. de Abreu e Lima, *Op. Cit.*, p. 236.

<sup>471</sup> “The constitution of this biography [of the nation] is a generational task, in such a way that, over time, by dint of constant repetition from the first letters to the university benches, with varying degrees of acuity and sophistication, certain stereotypes and themes are construct and reinforced until they are strong enough to give consistency to a body that just did not exist. Gradually, hypotheses, suppositions and affirmations are overcome, and the colony is placed as an antecedent of the nation. National histo-

historians point out. In a recently published chapter, Vera Lucia Queiroz Andrade highlights the fact that:

During the Empire, since the beginning of the construction of the Brazilian nationality, the monarchy's legitimation discourse led politicians/intellectuals to formulate a civilizing project of Nation, committed to the white-European and Christian identity profile idealized for the tropics [...] Education in monarchical Brazil had its place demarcated in the civilizing project of the Empire of State/Nation consolidation, being conceived as a social instrument for moralization, guarantee of order, and path to progress (translated)<sup>472</sup>.

From this point of view, there would be no reason to attribute to Sebastião José de Carvalho Melo administrative or political roles that did not fit him, especially since he exclusively represented the interests of the Portuguese Crown. Interestingly, the performance of the Minister of D. José I was often described as the augury of the Brazilian Empire. Linked to national historiography, Pombal was wrongly portrayed as the herald of the post-independence Brazil: a kind of historical step that would have accelerated the pace of Portugal, putting it in sync with other civilizations in Europe.

In the 19<sup>th</sup> and 20<sup>th</sup> centuries, this positive ideology of the Pombaline Reforms was reproduced in several *Brazilian History* manuals. This is when the efforts of less frivolous (and more responsible) researchers helped to critically review the extensive documentation on the captaincy of Minas Gerais, in the second half of the Portuguese-Brazilian 18<sup>th</sup> century. The examination of such works proves that the favorable image of Pombal started to be questioned by Brazilian researchers specially from 1970s, despite laudable exceptions.

In these cases, the studies carried out in the country often reverberated the serious work (and devoid of pseudo-nationalist ballast) of foreign historians. The latter induced local researchers to review the limits of Comte's ideas and the contradiction between economic liberalism and the slave regime, without adopting the formulas that praise the

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ries are constructed and a 'general history' involves a summation of these national histories. From this perspective, the colonial era loses its historicity and becomes a 'moment' in national history", R. F. da Silva, *Colônia e Nativismo: A História como "Biografia da Nação"*, São Paulo, Hucitec, 1997, p. 14.

<sup>472</sup> "Durante o Império, desde o início da tarefa de construção da nacionalidade brasileira, o discurso de legitimação da monarquia levou políticos/intelectuais a formularem um projeto civilizatório de Nação, comprometido com o perfil identitário branco-europeu e cristão idealizado para os trópicos [...] A educação no Brasil monárquico teve seu lugar demarcado no projeto civilizatório do Império de consolidação do Estado/Nação, sendo concebida como instrumento social de moralização dos indivíduos, garantia da ordem e caminho para o progresso", V. L. C. de Q. Andrade, "Colégio Pedro II – Patrimônio e lugar de memória da educação brasileira", in Arlette Medeiros Gasparello and Heloísa de Oliveira Santos Villela (org.), *Educação na História: Intelectuais, Saberes e Ações Instituintes*, Rio de Janeiro, Mauad, 2016, pp. 101-116, pp. 102 e 104.



“advances” in teaching, in commerce, and in law, attributed to the commands of the Portuguese statesman<sup>473</sup>.

In order to discuss the image of Pombal, repeated throughout the 19<sup>th</sup> century in Brazil, didactic manuals are covered. Their content is directly related to actors described in a grandiloquent way being transformed into protagonists leading episodes of overestimated scope. Certain men and events began to adorn the History of Brazil with great deeds, despite the authors’ claims of commitment to fact fidelity and to the “spirit” of industrious and theoretically convinced men, religiously and politically.

It seems symptomatic that, in these manuals, the historians reverberate the discourse of the epics that circulated in the Brazilian states, Maranhão and Grão-Pará, between the 17<sup>th</sup> and 18<sup>th</sup> centuries. This datum corroborates the need to reread the works with extra attention to reveal artifices the authors employ – theoretically, aiming to convey sincere intentions to the querent. Let us see what and how the novelist Joaquim Manuel de Macedo wrote in 1860, when he took over the chair of *History of Brazil*, at the Pedro II College:

The Dutch, despite their bad fortune in 1625, did not lose sight of Brazil [...] the audacious admiral Pieter Hayn entered the port of Bahia twice: first in 1627 and then in 1628. In the occasions, he took many merchant ships and, that last year, advanced to Recôncavo, where, in Peitinga, the brave captain Padilha died fighting against him (translated)<sup>474</sup>.

In assuming the persona of historian, Joaquim Manuel de Macedo resorts to adjectives and adverbs, both to praise the invader’s vice (“audacious admiral”) and to highlight the virtue of the Portuguese defender (“brave captain”). The intercalation of sentences in the paragraph allows the author to accumulate information that he considers relevant (dates and names of the actors involved). The aim is not only to instruct the school’s pupils, but

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<sup>473</sup> Among the most important early works, which adopted a critical perspective in relation to the Pombaline period, *As Reformas Pombalinas da Instrução Pública* [The Pombaline Public Instruction Reforms], by Laerte Ramos de Carvalho, 1952 (São Paulo, Edusp/Saraiva, 1978), stands out. More recently, one can highlight the following: *A Época Pombalina no Mundo Luso-brasileiro* [The Pombaline Period in the Portuguese-Brazilian World] – a collection organized by Francisco Falcon and Claudia Rodrigues (Rio de Janeiro, FGV, 2015) – and the compilation *Jesuítas e Ilustração: Rupturas e Continuidades* [Jesuits and Illustration: Ruptures and Continuities], edited by José Eduardo Franco, Karl Heinz Arenz, Luiz Eduardo Oliveira and Maria Regina Barcelos Bettiol (São Leopoldo, Editora Unisinos, 2019) – which brings together several researchers from Portugal and Brazil that seek to re-discuss the role and performance of the powerful Portuguese minister.

<sup>474</sup> “Os holandeses, apesar da má fortuna que tinham experimentado em 1625, não perdiam de vista o Brasil [...] entrou o audacioso almirante Pieter Hayn duas vezes no porto da Bahia, primeiro em 1627 e depois em 1628, tomando muitos navios mercantes, e naquele último ano, avançando para o recôncavo, onde em Peitinga, o valente capitão Padilha morreu combatendo contra ele”, J. M. De Macedo, *Lições de História do Brasil para Uso das Escolas de Instrução Primária*, Rio de Janeiro, H. Garnier, 1898, p. 154.

also to persuade them of the validity and truthfulness of data. As for Pombal, the teacher attributes an obvious role to him to endorse his achievements:

When D. João V died on July 31, 1750, his son, D. José I, succeeded him on the throne of Portugal, who called to his council the famous Sebastião José de Carvalho e Melo, later Count of Oeiras and Marquis of Pombal (grandson of a Brazilian), notable statesman, whose name will never be forgotten (translated)<sup>475</sup>.

Furthermore, on the one hand, if the positive image of Pombal served the nationalist purpose of D. Pedro II to suggest that the independent Brazilian State continued the march towards evolution the minister of D. José I initiated; on the other hand, it concealed the tension between the authoritarian spirit of the statesman and the first so-called “libertarian” (or credited as “revolutionary”) gestures in Brazil, half a century before the territory came to be effectively constituted as a nation.

The first misconception of many history manuals was to consider the State of Brazil as “national” decades before the official emancipation of the former Portuguese colony, thanks to the strong English thrust – as per Alan K. Manchester in *Preeminência inglesa no Brasil* [English Preeminence in Brazil]; Nelson Werneck Sodré, with *As razões da Independência* [The Reasons for Independence]; and H. E. S. Fisher, in his *De Methuen a Pombal* [From Methuen to Pombal]<sup>476</sup>. The second methodological lapse was in expressing (if not reproducing) impressions about the Portuguese statesman without, at least, consulting the vast documentation he signed.

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<sup>475</sup> “Falecendo D. João V a 31 de julho de 1750, sucedeu-lhe no trono de Portugal, D. José I, seu filho, que chamou ao seu conselho o célebre Sebastião José de Carvalho e Melo, ulteriormente conde de Oeiras e marquês de Pombal (neto de uma brasileira), notável estadista, cujo nome jamais será esquecido”, *Id.*, *Ibid.*, p. 255.

<sup>476</sup> “In 1580, Philip II submitted Portugal to Spanish rule, but in 1640 the Duke of Bragança started an uprising to free his country from Spanish control. Lisbon, struggling for independence and disturbed by Dutch attacks on the rich plunder coming from the colonies, asked England for assistance and sent a commission to London to negotiate a treaty recognizing the newly proclaimed [Portuguese]” (translated). Alan Manchester, *Op. Cit.*, p. 18. “Since the date it had been signed, [the Treaty of Methuen] was also opposed. In Portugal, the people of the time did not spare those who had been involved in the negotiations. Suspicions of bribery were publicized. [...] The treaty deserved severe criticism, even in official documents, when it was signed. Among them, one can highlight the one the Portuguese representative in London, D. Luís da Cunha, made. Heir to the ideas of the Count of Ericeira, supporter of Colbert’s opinions, D. Luís da Cunha expressed his opposition to the facilities granted to the entry of the English cloth into Portugal, where they would jeopardize the development of the corresponding national industries” (translated), N. W. Sodré, *Op. Cit.*, pp. 8-9. “Historians have been equally neglecting Brazil’s contribution to the English ‘commercial revolution’. This oversight results not only from superficial indications of its importance but also from English trade statistics, which do not record any businesses with Brazil nor show the importance of Portuguese-Brazilian trade for transactions between Portugal and England” (translated), H. E. S. Fisher, *Op. Cit.*, pp. 22-23.

## REVISION

Of humble and uncertain origin<sup>477</sup>, Sebastião José de Carvalho e Melo (1699-1782) was raised to gentleman (and later, nobleman) by maneuver of the family, as his biographers highlight. While Pombal is invariably portrayed as a promoter of the monarchy in larger and more extensive manuals, in small history books, he is summarily figured like an upside-down caricature, given his representation as a positive sign. Similar to the manuals of literary historiography, the country was portrayed as an economically, politically, culturally, and socially thriving nation, aimed at overcoming the “medieval” stage and breaking with the affiliation to the old Portuguese matrix, in an upward direction towards the future of order and progress.

It is common ground in critical historiography that the composition of *Histórias do Brasil* [Histories of Brazil] coincides chronologically with the foundation of the IHGB. It also adheres ideologically to the Empire’s commitment to attribute a nationalist character to the speech of a handful of partners and other protégés interested in passing on both imperial propaganda and the Catholic creed; in addition to giving importance to certain protagonists of national historiography. Just as Brazilian literature invents the 19<sup>th</sup> century, suggesting revolutionary ideas and patriotic feelings ahead of time – experienced by a handful of actors of Portuguese origin and mentality –, the Brazilian history manuals helped to forge a debatable temporal and ideological continuum, in which relatively serious episodes were considered disruptive milestones and indices of people’s evolution.

In other words, what could be understood as a contradiction of Portuguese history during the reign of D. José I (1750-1777) came to represent meritorious actions that would reflect the transition between the colonial and emancipated stages. The history manuals presented a kind of “acclimatization” of the minister, if not his ambivalent incorporation into Brazil’s prehistory – an anachronism allegedly justified by the events that took place half a century later.

In general, the Portuguese statesman was part of the historiography of the Second Empire mediated by the survival of the indigenous people, now catapulted to the condition of a national symbol. All Brazilian History manuals that circulated in the 19<sup>th</sup> century cite The Treaty of Madrid, signed in 1750, as one can observe in *Episódios de História* [Episodes of History], by J. C. Fernandes Pinheiro, first published in 1859:

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<sup>477</sup> J. L. De Azevedo, *O Marquês de Pombal e a Sua Época*, 2<sup>nd</sup> ed., Lisboa, Clássica Editora, 1990; A. Bessa-Luís, *Sebastião José*, Rio de Janeiro, Nova Fronteira, 1990; K. Maxwell, *Marquês de Pombal, Paradoxo do Iluminismo*, 2<sup>nd</sup> ed., translation Antônio de Pádua Danesi, Rio de Janeiro, Paz e Terra, 1996; C. C., *Perfil do Marquês de Pombal*, Lisboa, Plátano Editora, 2014; J. P. Chauvin, “Marquês de Pombal: Retrato sem moldura”, *Revista de Estudos de Cultura*, n.º 4, 2016, pp. 53-73.

The Jesuits' behavior caused a deep sensation in the offices of Lisbon and Madrid. Its influence on the spirit of the Indians was undeniable, and there was evident proof that the initiative and direction of the revolt came from them alone. D. José I was seated at that time in the Portuguese palace, and the energetic and enlightened minister Marquis of Pombal guided the monarchy's fate. He had long yearned to overthrow the dominance of the Society, which he deeply hated. As an able politician, the powerful minister took advantage of the Jesuits' opposition to the 1750 treaty to, adding it to other causes, decree the suppression of the Society and their conquests in Portugal through the charter of September 3, 1759 (translated)<sup>478</sup>.

Overlooked by D. João V, according to his biographers, Sebastião José would be requested as Secretary of the Kingdom by D. José I. This datum appears in several manuals aimed at formal education. Interestingly, the following excerpts suggest that pieces of information were replicated in most of them, perhaps mirroring the content taught at Pedro II College – a paradigmatic teaching institution. Here is how Américo Brasiliense portrays the arrival of Sebastião José:

When D. João V died, D. José I ascended the throne. His reign became notable for the acts of his minister, the Marquis of Pombal. This statesman animated commerce, forming companies rival to the English monopoly; he attacked the treaties with England, enacted salutary measures, removed Portugal from British influence. He entrusted the division of Southern Brazil to Freire de Andrade and that of the North to his brother (translated)<sup>479</sup>.

Published in 1854, the *História Geral do Brasil* [General History of Brazil], by Francisco Adolfo de Varnhagen<sup>480</sup>, may have inspired the terms that appeared in other manuals:

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<sup>478</sup> “Profunda sensação causou nos gabinetes de Lisboa e de Madrid a conduta dos jesuítas. Incontestável era a sua influência sobre o espírito dos índios, e evidentes provas se haviam colhido que só deles partira a iniciativa e a direção da revolta. Sentava-se n’essa época no sólio lusitano D. José I, e guiava o baixel da monarquia o enérgico e ilustrado ministro marquês de Pombal, que de há muito anelava por abater o predomínio da Companhia, votando-lhe profundo ódio. Como hábil político, aproveitou-se o poderoso ministro da oposição dos jesuítas ao tratado de 1750 para, adicionando-a a outras causas, fazer decretar a supressão da ordem em Portugal e suas conquistas pelo alvará de 3 de setembro de 1759”, J. C. F. Pinheiro, *Episódios da História Pátria Contados à Infância*, 4<sup>th</sup> ed., Rio de Janeiro, Garnier, 1866, p. 167.

<sup>479</sup> “Morto D. João V, subiu ao trono D. José I. Seu reinado tornou-se notável pelos atos do seu ministro o marquês de Pombal. Foi este estadista que animou o comércio, formando companhias, rivais do monopólio inglês; atacou os tratados com a Inglaterra, promulgou medidas salutaras, subtraiu Portugal à influência britânica. Confiou a repartição do sul do Brasil a Freire de Andrade, e a do norte a seu irmão”, A. Brasiliense, *Lições de História Pátria*, São Paulo, Typographia da Província, 1876, p. 118.

<sup>480</sup> “Varnhagen’s work can today be seen as a search for a nation in mid-19<sup>th</sup>-century Brazil. However, unlike France, England, or even in the United States, here the State existed, but the Nation was not yet organized. Some factors delayed the constitution of a nation in the modern sense of the word, name-

And when King D. José ascended to the throne after the death of his father D. João V, months after the treaty was ratified, [...] he [called] the famous minister Carvalho (who was in Lisbon back from his missions in London and Vienna) for his advice, he became better known by the title he later held of Marquis de Pombal (translated)<sup>481</sup>.

Varnhagen's formulation seemed to reverberate in Antônio Alves Coruja's manual:

On the death of D. João V in 1750, his son, D. José I, succeeded him, whose reign was made memorable by the administration of the Marquis of Pombal, whom the King endowed with great powers, trusting his actions completely. Portugal owes much to him, and especially the city of Lisbon, for his energetic measures on the occasion of the earthquake of which it was a victim on November 1, 1755; Brazil owes him no less for the animation he has given to its commerce, navigation, industry, and agriculture; above all, for the orders and decrees he issued in favor of the freedom of the Indians, their emancipation, and the maintenance of their property (translated)<sup>482</sup>.

With a slight change in the composition of Pombal's portrayal, João Pedro Xavier Pinheiro found another way to refer to the event:

In the early days of D. José's reign, the Marquis of Pombal was called to direct public affairs. This statesman was famous for his eminent talents and even more for his fervent desire to improve his country and lift it out of the despondency in which it

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ly: the specificity of Portuguese colonization, the sparse presence of immigration from family groups (which would only begin to grow in the end of the 19<sup>th</sup> century), the continuation of slave labor, and the absence of significant internal trade. On the other hand, Brazil's political emancipation took place in a very particular way, given that the son of Portuguese King led the movement with his consent in 1822. A transition without change, typical of a country that does not reform, rather, it reconciles" (translated), Jaime Pinsky, "Nação e ensino de história no Brasil", in Jaime Pinsky *et al.* (org.), *O Ensino de História e a Criação do Fato*, 14<sup>th</sup> ed., 3<sup>rd</sup> reprint, São Paulo, Contexto, 2017, pp. 11-26, pp. 13-14.

<sup>481</sup> "E havendo El-Rei D. José, por morte de seu pai D. João V, subido ao trono, meses depois de ratificar-se o tratado, [...] [chamou] a seus conselhos o célebre ministro Carvalho (que se achava em Lisboa de volta das suas missões em Londres e em Vienna), mais conhecido pelo título que depois teve de marquês de Pombal", F. A. de Varnhagen, *História Geral do Brasil antes de sua Separação e Independência de Portugal*, 2<sup>nd</sup> ed., tome 2, Rio de Janeiro, Laemmert, 1877, p. 915.

<sup>482</sup> "Por morte de D. João V em 1750, lhe sucedeu seu filho D. José I, cujo reinado se tornou memorável pela administração do Marquês de Pombal, a quem El-Rei muniu de grandes poderes, prestando absoluta confiança a seus atos. Se muito lhe deve Portugal, e especialmente a cidade de Lisboa pelas suas enérgicas providências por ocasião do terremoto de que foi vítima em 1<sup>o</sup> de novembro de 1755; não menos lhe deve o Brasil pela animação que deu ao seu comércio, navegação, indústria e agricultura; e sobretudo pelas ordens e decretos que expediu em favor da liberdade dos índios, sua emancipação e manutenção de seus bens", A. A. P. Coruja, *Lições da História do Brasil Adaptadas à Leitura das Escolas*, Rio de Janeiro, Typographia do Figaro, de Aguiar e Vellozo, 1877, p. 133.

laid. After acting and proving his high ability, he considered convenient and even necessary to wage war against the Jesuits, who looked upon him as an obstacle to their purposes (translated)<sup>483</sup>.

In turn, Luís Queirós de Mattoso Maia seemed to echo Varnhagen's terms:

D. João V, who died on July 31, 1750, was succeeded by his son D. José I, whose reign constitutes one of the most important epochs in the history of Portugal, due to the administration of the famous minister Sebastião José de Carvalho e Mello, Count of Oeiras (June 1759) and Marquis of Pombal (September 17, 1770). In the same way that Louis XIII in France had resolutely trusted the political and administrative acumen of Cardinal Richelieu, so D. José I, after having recognized the governmental gifts of his minister Carvalho e Mello, entrusted him with the public administration (translated)<sup>484</sup>.

Almost the same can be said of Villa-Lobos, whose manual appeared a few years later.

After D. João V died on July 31, 1750, D. José I succeeded his father on the throne of Portugal. Except for his brilliant idea to call the notable politician Sebastião José de Carvalho e Mello, Count of Oeiras and later Marquis of Pombal, to be part of the Portuguese administration, this country would have plunged into the abyss towards which it was striding before completing the 26 years of its reign (translated)<sup>485</sup>.

As mentioned, the initial records on the History of Brazil were articles published in *Revista do IHGB* (Brazilian Historical and Geographical Institute), in the end of the 1830s.

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<sup>483</sup> “Nos primeiros tempos do reinado de D. José foi o marquês de Pombal chamado à direção dos negócios públicos. Este estadista, famoso por eminentes talentos e ainda mais pelo fervoroso desejo de melhorar o seu país e tirá-lo do abatimento em que jazia, depois de atos em que provou sua alta capacidade, teve por conveniente e até necessário guerrear os jesuítas, os quais lhe antolhavam como um obstáculo aos seus desígnios”, J. P. X. Pinheiro, *Epítome da História do Brasil desde o Seu Descobrimento até a Conclusão da Guerra do Paraguay*, 7<sup>th</sup> ed., Rio de Janeiro, Eduardo & Henrique Laemmert, 1880, pp. 277-278.

<sup>484</sup> “A D. João V, falecido em 31 de julho de 1750, sucedeu seu filho D. José I, cujo reinado constitui uma das épocas mais importantes da história de Portugal, por causa da administração do célebre ministro Sebastião José de Carvalho e Mello, Conde de Oeiras (junho de 1759), e Marquês de Pombal (17 de setembro de 1770). Da mesma forma que Luís XIII em França tinha-se resolutamente confiado no tino político e administrativo do Cardeal Richelieu, assim D. José I, depois de ter reconhecido os dotes governamentais do seu ministro Carvalho e Mello, entregou-lhe a direção da administração pública”, L. de Q. M. Maia, *Lições de História do Brasil Proferidas no Internato do Gymnasio Nacional*, 3<sup>rd</sup> ed., Rio de Janeiro, B. L. Garnier, 1891, p. 216.

<sup>485</sup> “D. José I sucedeu no trono de Portugal a seu pai D. João V, falecido a 31 de julho de 1750. A não ser sua luminosa ideia chamando o notável político Sebastião José de Carvalho e Mello, conde de Oeiras e depois marquês de Pombal, para fazer parte da administração de Portugal, ter-se-ia este país, antes de completar os 26 anos do seu reinado, despenhado no abismo para onde a passos largos caminhava”, R. Villa-Lobos, *História do Brasil (Resumo Didático)*, 4<sup>th</sup> ed., Rio de Janeiro, Laemmert, 1896, p. 106.

In general, they were guided by the praise of the Empire, in fidelity to the Holy Catholic Church and the forge of the Nation, super indebted and newly independent.

Except for some caveat, which Francisco Adolfo de Varnhagen recorded in the first edition of his *História Geral do Brasil* [General History of Brazil], in 1854, this set of essays seems to have influenced the authors who produced manuals in the country, in line with Karl von Martius' prescription<sup>486</sup>. In Patricia Valim's summary:

Political centralization [...] became the main objective for the Conservative Regress; therefore, fundamental institutions were established to "correct" the decentralizing orientation of the regency period. This endeavor led to the creation of institutions, such as: the Pedro II College, the Public Archive of the Empire, and the Brazilian Historical and Geographical Institute in 1838 [...] both national literature and historiography, forged from Rio de Janeiro, are part of the same process, according to which men of letters use the culture for practical objectives: to organize the hegemony of the Brazilian State and to promote the material progress of the nation without, however, touching the issue of slavery (translated)<sup>487</sup>.

Today scholars know that the authors' conception was based on the ideologies of the Empire and replicated by the members of the IHGB under the benevolent gaze of D. Pedro II. Similar to what happened in literature, historiography propagated the government's ideals<sup>488</sup>. Therefore, regarding the writing of a national history, if our intention is to locate the figure of Pombal with the greatest possible precision, it would be essential to carry out a double movement.

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<sup>486</sup>"In the main points, the history of Brazil will always be the history of a branch of Portuguese people; but if it aspires to be complete and deserves the name of a pragmatic history, its relations to the Ethiopian and Indian races can never be excluded", Karl von Martius, *Op. Cit.*, p. 454.

<sup>487</sup> "A centralização política [...] passou a ser o objetivo prioritário para o Regresso conservador, estabelecendo-se, assim, instituições fundamentais para 'corrigir' a orientação descentralizadora do período regencial. Nesse empuxo, criaram-se instituições como: o colégio Pedro II, o Arquivo Público do Império e o Instituto Histórico e Geográfico Brasileiro, em 1838 [...] tanto a literatura quanto a historiografia nacional, forjadas a partir do Rio de Janeiro, inserem-se num mesmo processo, segundo o qual os homens de letras procuram usar a cultura com objetivos práticos: organizar a hegemonia do Estado brasileiro e promover o progresso material da nação sem, contudo, tocar na questão do escravismo", P. Valim, *Da Sedição de Mulatos à Conjuração Baiana de 1798: A Construção de Uma Memória Histórica*, Master's dissertation presented to the Universidade de São Paulo, São Paulo, 2007, pp. 126-127.

<sup>488</sup>"After the establishment of the association in the Imperial Palace to strengthen the figure of the boy-emperor with pomp and circumstance through imperial Christmas celebrations, the hand-kiss ceremony, among others, the members of the IHGB, under the penalty of its perpetual secretary, Canon Januário, decided to offer a prize of 200\$000rs to whoever presented the best 'plan to write the ancient and modern history of Brazil' [...]. The judging committee decided that the memoir presented by Karl von Martius (1794-1868) would serve as models for future works presented to the IHGB", *Id., Ibid.*, pp. 129-130.

On the one hand, researchers would need to revisit the treaties, decrees, letters, and other documents attributed to the Minister of D. José I. On the other hand, they would have to compare the manuals of Brazilian history, which circulated in the country during the Imperial regime, to counterbalance some stereotypes attached to the overrated image of the Portuguese strategist and patron. These and other issues were discussed sparingly. It would be useless to recall the obvious fact that Pombal did not foresee the Independence of colonial Brazil, nor did he adhere to the Portuguese born in the State of Brazil. Neither did the reforms he led prevent remnants of the Portuguese kingdom mentality from persisting in subsequent centuries, in the name of the miter, gold, and the throne. Until mid-18<sup>th</sup> century, the ways and artifices that conferred discretion on the subjects of the Crown were still considered virtues. As João Adolfo Hansen well observes:

Sharpness, prudence, dissimulation, appearance, and honor constitute discretion. In the absolutist monarchies of the 17<sup>th</sup> century, especially the Iberian ones, discretion is the core pattern of the court rationality that defines the courtier, proposed to the entire political body of the State as the model of the *uomo universale*, the universal man, as Castiglione said in the 16<sup>th</sup> century. In the practices of representation, discretion is an intellectual category that classifies or specifies the distinction and superiority of actions and words, appearing linked to the *discrete*, which is a type or a character of the interlocution processes (translated)<sup>489</sup>.

During the 19<sup>th</sup> century, principles and values that guided the societies of the Old State would be emulated, usually in the form of pastiche, by the incipient Brazilian, landowning, rude, and slaveholding bourgeoisie. To a newly independent country, it seemed fundamental to forge an ennobling and nationalist historiography written by “good men”, mostly white, powerful, and well-regarded by the representatives of the Empire, with whom they maintained utilitarian relations, rarely guided by gestures of discreet nobility.

The analysis of the aforementioned manuals indicates that, in the 19<sup>th</sup> century, it would be an inglorious task to locate books on the History of Brazil that presented a more impartial image of Sebastião José de Carvalho e Melo. In most of them, Pombal was not only favored, but also characterized as a statesman who rebuilt Lisbon from the rubble of 1755 and, taking the lead of King D. José I, would have reoriented the history of Brazil, half a century before its (relative) political independence was proclaimed.

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<sup>489</sup> “Agudeza, prudência, dissimulação, aparência e honra constituem a discrição. Nas monarquias absolutistas do século XVII, principalmente nas ibéricas, a discrição é padrão nuclear da racionalidade de corte que define o cortesão, proposto para todo o corpo político do Estado como o modelo do *uomouniversale*, o homem universal, como dizia Castiglione no século XVI. Nas práticas de representação, a discrição é categoria intelectual que classifica ou especifica a distinção e a superioridade de ações e palavras, aparecendo figurada no discreto, que é tipo ou personagem dos processos de interlocução”, J. A. Hansen, “O discreto”, in J. A. Hansen, *Agudezas Seiscentistas e Outros Ensaios*, São Paulo, Edusp, 2019, pp. 97-122, p. 104.



# THE INSTALLATION OF THE POMBALINE CABINET AND MADEIRA ISLAND

CRISTINA TRINDADE<sup>490</sup>

RUI CARITA<sup>491</sup>

The diplomatic career of Sebastião José de Carvalho e Melo (1699-1782), later Count of Oeiras (1759) and Marquis of Pombal (1769), prepared him, albeit unintentionally, for the position that would make him the most prominent figure of the second half of the 18<sup>th</sup> century in Portugal. The contact with new government models, both in London and Vienna, would shape his exercise of power. In the first case, for instance, the influences of William Petty (1623-1687) and his *Political Arithmetick* (1676-1690) are visible in the concerns with statistics as an instrument to provide data for more solid support for governance<sup>492</sup>. From Vienna, on the other hand, he would bring a cameralist view of the organization of the public administration focused on being more expeditious (“active administration”) in the collection of taxes. In turn, this model implied greater training of the royal officialdom and a refinement of control strategies towards new measures emanating from the center<sup>493</sup>.

The progressive and innovative directives of the Pombaline cabinet apparently took some time to arrive in Madeira, not even being immediately evident in the regional documentation that has reached our days. However, with the accession of D. José I (1714-1777) to the throne, they were gradually implemented with the help of both governors and the bishop introduced to Funchal – elements with completely different posture and intervention with the powers established locally. The directives took place decidedly with the consolidation of the future Marquis at the head of the royal cabinet, which, logically, raised several problems in the main Madeiran families. The design and implementation of a reformist program such as the one that the future Marquis of Pombal defined and developed could not have been carried out without the contribution of a vast group of

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<sup>490</sup> University of Lisbon, Portugal.

<sup>491</sup> University of Madeira, Portugal.

<sup>492</sup> António César de Almeida Santos, “Aritmética Política e governo no reinado de D. José (Portugal, 1750-1777)”, *VI Congresso Internacional de História*: [https://www.academia.edu/11411880/Aritm%C3%A9tica\\_Pol%C3%ADtica\\_e\\_governo\\_no\\_reinado\\_de\\_D\\_Jos%C3%A9\\_I\\_Portugal\\_1750\\_1777](https://www.academia.edu/11411880/Aritm%C3%A9tica_Pol%C3%ADtica_e_governo_no_reinado_de_D_Jos%C3%A9_I_Portugal_1750_1777) (consulted online on November 14, 2022).

<sup>493</sup> José Subtil, “Os poderes do centro. Governo e administração”, in José Mattoso (dir.) *História de Portugal*, vol. IV, Círculo de Leitores, Lisbon, 1993, pp. 157-193.

prepared and faithful collaborators located throughout the Empire, who executed the Pombaline instructions within the territory and which, unlike propagated ideas, predates the consolidation of the Pombaline cabinet. These directives restructured the country in its most diverse aspects - commerce, finance, politics, administration, education, Church, to speak only of the most obvious.

The governors of Madeira appointed in the first years of the reign of D. José I fit into a new governmental posture, even before the effective installation of the so-called “Pombaline cabinet”. They were D. Álvaro Xavier Botelho de Távora (1708-1789), Count of S. Miguel, in 1751, and Manuel de Saldanha e Albuquerque (1712-1771) in 1754, later first Count of Ega and Viceroy of India. Both of them have a different background, as well as the capacity for intervention, who also put pressure on the royal cabinets towards a new form of governance, which will later be called “enlightened despotism”. Overseas governors were appointed, in principle, by the Overseas Council and, after the remodeling of 1736, by the secretary of state for the Navy and Conquests Affairs<sup>494</sup> or by someone directly linked to the monarch<sup>495</sup>. In this case, the secretary Sebastião de Carvalho e Melo, head of the Foreign Affairs and War sector, must have had no special intervention in the appointment of a person, unless proven otherwise.

On August 2, 1752, the Count of São Miguel wrote to the Secretary of State for the Navy and Conquests Affairs: “I have understood that either I am a great man or the island of Madeira is useless; because, in eleven months in which I have governed it, not a Secretary of State remembered to give me his instructions nor a King his orders”, concluding: “the court that does not write to me trusts me”<sup>496</sup> (translated). The governor, however, does not fail to include, in this one and other letters, several corrections to the definition of his powers, mainly in the field of justice administration. Essentially, he asks for a qualified magistrate with broad and defined jurisdiction, which only happened effectively with the consolidation of the future Pombaline cabinet.

We owe the hierarchical redefinition of the governing frameworks in Madeira to the Count of São Miguel in 1754, if one can say so. The aforementioned Count defined this framework when he realized that the rotations of the main governing boards on the Island were coinciding. Meanwhile, given his departure to Brazil, the three years of the farm provider and the *juiz de fora* [a judge from outside of the city to impartially analyze matters, henceforth judge] ended, in addition to the death, some time before, of the then prelate of Funchal, D. Fr. João do Nascimento (c. 1690-November 6, 1753). He then re-

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<sup>494</sup> Government remodeling of July 28, 1736. The secretariats of state were then divided as follows: Interior Affairs of the Kingdom, Foreign Affairs, and War and Navy Affairs and Conquests.

<sup>495</sup> Joaquim Veríssimo Serrão, *História de Portugal*, vol. VI, (1750-1807), Verbo, Lisbon, 1982, “A nobreza metropolitana e ultramarina”, pp. 120-125.

<sup>496</sup> AHU, *Madeira e Porto Santo*, cataloged, cx. 1, n.º 6. Funchal, August 2, 1752.

fers to the governor as “the Land Parties:” General Government, City Council Senate, Bishopric and Finance Ombudsman, “which are the heads of all the bodies of this earth, and which, through his pride, will not despise, not even the smallest occasion, to inspire discord among his superiors” (translated). And in this sequence, he adds: “Look, Your Excellency, with a new governor; new bishop; new judge and new provider, what other pieces of news of unrest can one expect on this Island, given the arrival of 4 heads with 8 blind eyes. If these men are guided by the eyes of the earth, they will stop at a precipice; and if they guide themselves, they will be buried in a pit” (translated)<sup>497</sup>.

The inexistence of a regiment that consigned the competences of the governor of Madeira was one of the problems throughout this period, remaining undefined even with the consolidation of the Pombaline cabinet. The matter was soon addressed by his successor, Manuel de Saldanha de Albuquerque, who, having taken office on May 16, 1754, after analyzing the situation for a few months, prepared an extensive and interesting report, dated the following October 1. The future Count showed the drawbacks of such a situation: “this lack cannot fail to be an embarrassment on many occasions” (translated) and which, in the best of intentions, could lead to interference between the various instituted powers, namely of justice – from the corregidor, judge, and the Ombudsman – or of the farm – from the provider. The governor insists that “this very just fear obliges me to beg and ask Your Majesty, with the deepest respect and the greatest submission [...], to give orders to this government declaring the jurisdiction of its governors” (translated)<sup>498</sup>.

The answer, however, was probably vague. In May of the following year, the governor thanked him for the letters of February 20 and March 6, in response to the questions raised about the general state of the Island. The governor’s acknowledgment and quote leave no doubt that everything had remained the same: “I am warned that what belongs to the jurisdiction of this government is the same as in all others” (translated). The governor adds, in spite of everything, that he had become more relaxed “in this part, because I know what directly affects me, so as not to exceed or lack regarding what I am obliged to do”<sup>499</sup> (translated). There is no doubt, therefore, that nothing special had come forward.

Manuel de Saldanha de Albuquerque’s government in Madeira coincided with the earthquake of November 1, 1755 in Lisbon and also presents the novelty of getting the presence of an engineer in Funchal, specifically Francisco Tossi Columbina (1701-c. 1770), of Italian origin<sup>500</sup>. His mission was to study the future works of the port of Funchal; nonetheless, the governor would not have believed much in his abilities to carry out a work of

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<sup>497</sup> AHU, *ibidem*, cx. 1, n. 40.

<sup>498</sup> *Ibidem*, n. 48. Report of October 1, 1754.

<sup>499</sup> ABM, ARM, *Governo Civil*, L.º 349, fls. 20-25.

<sup>500</sup> There are several reports by Tossi Columbina about his engineering work in India in the Ajuda Palace Library.

such magnitude<sup>501</sup>, suggesting to the Secretary of State for the Navy and Overseas Affairs, Diogo de Mendonça Corte Real (c. 1695-1771), an internship to the engineer in Brazil. However, when he returned, he completely dispelled this impression and began to accompany the governor as his working official, with a perfect communion of opinions and interests. This is evident, for example, in the letters they sent to Sebastião José de Carvalho e Melo in the end of 1757 regarding the Law and Charter relating to the liberation of the indigenous people of Brazil<sup>502</sup>. In 1758, when Manuel de Saldanha de Albuquerque was appointed viceroy of India, he was later accompanied by this engineer.

## THE MARQUIS OF POMBAL AND THE MADEIRAN CHURCH

The Church occupies a leading place within the areas in which the Pombaline reformism was mostly felt. Given that it had undeniable preponderance in the Portuguese society, economy, politics, ideology, jurisdiction, culture, and education, it constituted an obstacle to the ongoing process of power absolutization. Therefore, it is not surprising that it was the main object of Pombal's reform impetus, which began to be designed shortly after the 1755 earthquake and took shape in the subsequent period.

As the leading representatives of the Church in their dioceses, the bishops were endowed with considerable power of intervention; for this reason, they became object of particular attention in the Pombaline consulate. In fact, and as José Pedro Paiva rightly observed, the criteria for episcopal appointments changed in the period in question, with individuals coming from the regional nobility being preferred instead of the former representatives of the great noble houses, to whom it was customary to attribute the most profitable miters on the Portuguese mainland<sup>503</sup>. Training with a legal basis also began to be favored, along with a career with evidence given in various institutions – Inquisition, diocesan administration, religious orders or university teaching, which meant that the chosen individuals could not be very young, being people especially in their fifties and in line with the regalist principles subscribed by the Marquis.

In short, and as Leandro Lima says “It was not by chance that the co-optation of the episcopate as an instrument of the State reached a degree hitherto unknown, making the mitered fundamental instruments of the new structured framework, as well as direct col-

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<sup>501</sup> AHU, *Id.*, n.ºs 64 e 68. Governor's letter suggesting the engineer's trip to America. Funchal, January 15, 1756; *idem*, about his appointment to Funchal and questioning his competence. Funchal, January 15, 1756.

<sup>502</sup> *Id.*, *Ibid.*, n.ºs 125 e 126. Letters from the governor and engineer to Sebastião José de Carvalho e Melo. Funchal, November 5 and 28, 1757.

<sup>503</sup> José Pedro Paiva, “Os novos preladados diocesanos nomeados no consulado pombalino”, *Penélope*, n.º 25, 2001, pp. 41-63.

laborators in his [the Marquis'] regalist policy"<sup>504</sup>. Therefore, following the trajectory and action of the prelate that the Marquis decided to put at the head of the diocese of Funchal could be a way of detecting changes that signal his action, now in line with the emerging paradigm<sup>505</sup>.

The bishop appointed to the diocese of Funchal in 1756 arrived there in August 1757: D. Afonso Gaspar da Costa Brandão (1703-1784). He meets all the requirements from that time: he is 54 years old, born in Águeda, from a family of local "main people" who lived "by the law of the nobility"<sup>506</sup> studied Canons in Coimbra, taught at the university, was a judge of the episcopal table, and then, already in Lisbon, as a prelate, he joined the Patriarchal – a "nursery of candidates for the episcopate" (translated), according to José Pedro Paiva<sup>507</sup>.

The most outstanding intervention of the bishop in line with Pombaline policies is, of course, related to the Jesuits, against whom he had nothing at the beginning of the episcopate. This is evidenced by the prompt execution he gave to a letter, dated September 26, 1756 and coming from the Secretary of State for the Affairs of the Kingdom, presided over by the future Marquis, who ordered that S. Francisco de Borja be venerated as "patron and protector of all his kingdoms and domains"<sup>508</sup> (translated).

In February 1759, however, the case changed. Even before the order of arrest of the priests of the Company, which was executed in Madeira on May 29, 1759, the bishop had already had an edict posted on the door of the Cathedral, on the previous February 5, which initially claimed: "We make it known that being so notorious and justified the just reasons why we have forbidden all Jesuit religious" to practice confession and preaching "in all our Bishopric" (translated), despite the noticeable lack of confessors. In other words, D. Gaspar Afonso, in possession of some information that was not yet public knowledge, took the initiative to immediately start removing the priests from the Society, which one can understand as a servile attitude he would assume towards Pombal. This despite owing his nomination for the Funchal miter, according to João Francisco

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<sup>504</sup> Leandro Ferreira Lima da Silva, "O Regalismo entre a norma e a prática: o caso dos carmelitas fluminenses (1750-1808)", in *Anais XXVI Simpósio de História – ANPUH*, S. Paulo, 2011, pp. 1-8: [http://www.snh2011.anpuh.org/resources/anais/14/1300922948\\_ARQUIVO\\_ArtigoCompleto-LeandroFerreiraLima-da-Silva\(USP\).pdf](http://www.snh2011.anpuh.org/resources/anais/14/1300922948_ARQUIVO_ArtigoCompleto-LeandroFerreiraLima-da-Silva(USP).pdf) (consulted online on November 14, 2022).

<sup>505</sup> José Augusto dos Santos Alves, "O Marquês de Pombal e a mudança de paradigma", *Cultura*, vol. 22, 2006: <http://journals.openedition.org/cultura/2222> (consulted online on December 19, 2021).

<sup>506</sup> José Pedro Paiva, *Op. Cit.*, p. 46.

<sup>507</sup> *Id.*, *Bispos de Portugal e do Império, 1495-1777*, Coimbra, 2006, p. 532.

<sup>508</sup> ABM, APEF, *Registo Geral da Câmara Eclesiástica*, L<sup>o</sup> 3., fl. 72v-73.

Marques, to the Ignatians in general and to Father José Moreira, Jesuit and confessor of D. José, in particular<sup>509</sup>.

Wasting no time, shortly after the Jesuits were incarcerated in their College, the prelate publishes a pastoral, dated June 27, 1759. In this text, he does not spare adjectives to refer to the Ignatians, who, he considers, “abused the Sacred Ministries to corrupt the consciences of the delinquents who have been judged, using, for such an abominable end, the means of sowing and persuading the poison of Machiavellian deceptions and anti-evangelical doctrines that, as impious, seditious, and destructive of Christian Charity and civil society, and of public peace of the States, had been condemned and proscribed by the Church of God [...], the aforementioned religious sayings also intending to infect not only the court, but the provinces of the Kingdom with those doctrines, in order to alienate the faithful from the main obligations of Charity and subjection to the Throne”<sup>510</sup>.

Shortly afterwards, on October 3 of the same year, the protests of fidelity to the King were renewed in a pastoral that once again forbade contacts with Jesuits, exhorting diocesan bishops to recognize that only in “obedience, love, and fidelity to the sovereign and in the observance of his Laws consists the health of the Republic, the preservation of the union of society, and the happiness of the Monarchy”. This is a good example of the laudatory speeches that also characterized the new Pombaline bishops<sup>511</sup>.

Bishop Afonso da Costa Brandão had brought with him two Vincentian priests, Fathers José Alásio and José dos Reis, which already signals the will for reform within the bishopric. These Mission priests had the purpose of visiting the entire diocese, including convents, of preaching, of confessing, and of reforming. Concerning that 10 years’ work in Madeiran lands, they left a written record, an important document because it provides a first-hand testimony of the tribulations they and the bishop went through in Madeiran lands in the pursuit of their reforming intentions.

The priests’ narrative points out, for example, problems that occurred in both female and male convents, which demonstrate, in principle, to what point conventual life had declined, as well as the absolute need to invert behaviors. According to visitors, the convent of Our Lady of Incarnation was the one that caused the most problems, mainly because the nuns did not want to dress as required by the Second Rule of Santa Clara and preferred blue silk to gray burel. On their first visit there, the priests tried to eradicate this idiosyncrasy but did not obtain great results. However, on the fifth visit to the same institution, carried out in 1762, the situation worsened, with the nuns’ riot – they threatened

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<sup>509</sup> João Francisco Marques, “Oratória Sacra na Madeira – Esboço histórico”, in José Eduardo Franco (coord.), *Grande Dicionário Enciclopédico da Madeira*, vol. Antezero, which integrates the journal *Letras com Vida*, n.º 7, Lisbon, 2014-2015, pp. 24-41, p. 34.

<sup>510</sup> Archive of the Diocesan Curia of Funchal (ACDF), box (cx.) 45, doc. 25.

<sup>511</sup> ACDF, cx. 45, doc. 26.

to break the cloister because they understood that the bishop “had no jurisdiction to make them change [their habits and veils]” (translated)<sup>512</sup>.

The bishop reacted immediately to this threat and promptly addressed the governor, João António de Sá Pereira (1719-1804), to request the provision of “a dozen soldiers” (translated) in order to prevent the nuns from leaving, to which the bishop governor readily agreed. The agitation of the regulars was not limited to this convent. In Santa Clara, the same uses and clothing were found. Meanwhile, in Virgin of Mercy, the nuns did not fast when they should, they spoke in the locutory whenever they felt like it, and even had the luxury of owning sheets. Nonetheless, the situation in the Convent of S. Francisco was far more serious. There, in 1759, there were so many internal disagreements that a faction of the friars wrote to the King for measures to be taken. With the nuncio’s agreement, the king ordered Dom Gaspar to visit the institution, endowed with full powers to act as he saw fit. The letter that contains these determinations is from Sebastião de Carvalho e Melo himself, authorizing the prelate to act as the Nuncio in the “Ministry of Ordinary Apostolic Visitor to reduce the due Custody of Minor Observant Religious of that Island of Madeira” (translated)<sup>513</sup>.

The matter had repercussions in all instances of the island and was, according to the opinion of the Lazarists, “a unique case, never seen or expected on the island of Madeira” (translated)<sup>514</sup>. That was the only occurrence at this time, but in 1768 the problems took place again. The bishop was charged with intervening one more time, and the King asked the governor for an opinion on events. Sá Pereira responds that he collected information from a friar he considered honest and confirms that “religion is lost” (translated). As for the bishop, the governor says that he refuses to make a visit and chapter in the convent, “to perpetuate the government of the so-called Regulars, because their genius is all full of vanity, with a blind ambition to want to dominate” (translated), leaving here a note on his opinion of the prelate.<sup>515</sup>

From these brief indications, one can conclude that the conventual reform was one of the objectives of the Pombaline policy in relation to the Church, given that only between 1757 and 1768, in Madeira, it was possible to identify 18 visits to all convent institutions, including the Convent of Bom Jesus dos Perdões of Ribeira. To get an idea of how unprecedented this is, it should be noted that, about 50 years earlier, in the episcopate of

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<sup>512</sup> Luís Machado de Abreu, “A Congregação da Missão na Madeira (Lazaristas). ‘Da Nossa ida e vinda da Ilha da Madeira’”, in José Eduardo Franco (coord.), *Grande Dicionário Enciclopédico da Madeira*, vol. Antezero, which is an integral part of the journal *Letras com Vida*, n.º 7, Lisbon, 2014-2015, pp. 51-61, p. 57.

<sup>513</sup> Archive and Library of Madeira (ABM), Archive of the Bishop’s Palace of Funchal (APEF), *Registo Geral da Câmara Eclesiástica do Funchal*, Livro 3º, fl. 79v. The letter dates to October 13, 1758.

<sup>514</sup> Luís Machado de Abreu, *Op. Cit.*, p. 54.

<sup>515</sup> ABM, Regional Archive of Madeira, *Governo Civil*, Lº 350, fl. 25v.

D. Frei Manuel Coutinho, who left an extensive account of his stay on the Island, no visit to a convent was registered, even though the nuns of the Incarnation had, in fact, broken the cloister<sup>516</sup>.

These and other similar situations that would come to the knowledge of the King were one of the arguments for banning the entry of more novices into conventual houses, measure that was fulfilled in Madeira, as the Register of Receptions, Entrances, and Vows of novices of the Virgin of Mercy convent evidences. Soon after the entry of the last novice in 1764, it only reports the entry of others in the period of D. Maria<sup>517</sup>. The ban on the entry of candidates to the regular clergy is just one of the measures that greatly affected the ecclesiastical patrimony, given that it prevented the collection of dowries, which helped to balance the conventual accounts. In addition to this one, other measures contributed to the same end, like the case of Testamentary Laws with retroactive effects that authorized the return of goods that were previously religious patrimony to the Crown, or the law that annulled low-income estates, some of them ecclesiastical, for instance.

Another example concerning modifications to ways of proceeding occurs between the governor and the priest D. João José de Sá (1707-1782). The latter, despite being “*pardo*” [mixed race] was a prominent figure in insular society and the right-hand man of the richest woman in Madeira, D. Guiomar Madalena de Sá e Vilhena (1705-1789), his relative, whom he helped in the administration of the largest commercial house of the time. This priest Sá dared to face the governor who considered him a “proud genius” and “even more harmful for remembering to make himself impenetrable, for his condition, power, the entourage he has, and the ecclesiastical state he professes” (translated)<sup>518</sup>. He would have had the “arrogance” to publicly mention, at a family gathering, that the governor was essentially a military man, so his government should be restricted to the military forces themselves. Therefore, neither the requests of D. Guiomar Madalena de Vilhena nor those of the third Marquis of Angeja (1718-1788) or of the Secretary of State Aires de Sá e Melo (1715-1786), who in 1752 had become the brother-in-law of the governor, stopped him from letting the priest return to Funchal. Immune to any pressure or personality, the governor banished him to the north of the island, and there was nothing that led him to revoke the decision. Father José de Sá appealed to the bishop, who refused to grant the requests, not risking contradicting the governor or in defense of his direct subordinate, perhaps because the proximity between the governor and the future Marquis had dissuaded him.

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<sup>516</sup> ABM, APEF, doc. 270, *Memorias dos Acontecimentos Ocorridos no Episcopado do Bispo do Funchal, D. Frei Manuel Coutinho, 1725-1738*.

<sup>517</sup> ABM, APEF, *Registo das receções, entradas e votos de noviças (1751-1834)*, concerning the Virgin of Mercy Convent.

<sup>518</sup> ABM, ARM, GC., L.º. 530, fls. 162-163.



No matter how close the relationship between the prelate and the court was, the opinions of the two entities did not always converge. In such cases, whenever there was friction, the prelate was defeated. This is what happened in the matter of the confraternities – a royal provision informed they should send their commitments to Lisbon to be confirmed “without any opposition”, not even that of the bishop, which “was not answered”. A royal provision clearly expresses that “the request of the Bishop who objected could not get the supreme jurisdiction of the King” (translated)<sup>519</sup>.

Other conflicts had similar outcomes: the one that opposed the bishop to Mercy, who complained of seeing his church occupied by curates of Sé, in order to benefit from the funerals of the people who chose to be buried in the aforementioned Mercy and that the King dispatches favorably to complainants<sup>520</sup>; the one regarding the process brought by Canon Sebastião Fernandes de Aguiar, candidate for the post of archdeacon, in which the King informs that the bishop should “suspend your judgment” for the appeals go to the Court of the Table of Conscience and Orders “your legitimate superior”, assuming that “all your [the bishop’s] sentences were revoked and the aforementioned contest was judged and declared void” (translated), later determining that all candidates would take tests in Lisbon<sup>521</sup>; that which involved the release of a canon imprisoned in the Sé tower by order of the bishop, for having opposed the prelate visiting the cathedral, to give just a few examples<sup>522</sup>. In short, as much as D. Gaspar was Pombal’s “creature”, there was never any room to doubt who actually held power.

The management of D. Gaspar in the extinction of the Society of Jesus, in acknowledgment of his work, deeply marked the history of the Church in Madeira in a way. Having taken over the closing operation of Funchal College, he safeguarded all the Jesuits’ movable heritage, transferring it to the seminary, annexed to the episcopal palace, to the parish churches, and to the Madeiran convents. In this context, for example, although the Treasur’s office had listed the College’s silverware, the diocese ended up recovering them, and the matter was also raised later in the following 19<sup>th</sup> century, always with no result.

In this sequence, with the extinction of the convents at the time of liberalism, the diocese managed to revert to its favor all its movable patrimony, decision maintained in the first Republic. Therefore, while this heritage passed to the State on the mainland, essentially constituting a good part of the heritage of the great national museums, such as those of Soares dos Reis, of Porto, of Grão Vasco, of Viseu, of Machado de Castro, of Coimbra, of Frei Manuel do Cenáculo de Évora, of Lisbon, Ancient Art, and others, this did

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<sup>519</sup> *Idem*, ARM, *Câmara Municipal do Funchal*, Registo Geral, Tomo 11, fl. 154-154v. The document is dated September 12, 1767.

<sup>520</sup> *Ibidem*, Tomo 12, fls. 29v-33.

<sup>521</sup> *Idem*, APEF, *Registo Geral da Câmara Eclesiástica*, n. 4, fls. 3-3v.

<sup>522</sup> *Idem*, ARM, *CMF*, *Ib.*, fl. 33.

not happen in Madeira. With a large part of these museums installed in the old episcopal palaces, something similar happens in Madeira; however, unlike the national museums, the collection and management of the Museum of Sacred Art of Funchal, even today, is that of the diocese.

One of the most impacting effects of the expulsion from the Society of Jesus concerns the emerging problems for education. Until then, this sector was almost entirely under Jesuits' responsibility, and the shock waves of this event spread across various narratives and legislative supports. In the letter that the governor wrote to the king on July 1, 1768, concerning the Franciscans, he requests that the kingdom send a Lector of Philosophy, very necessary for the younger friars of the convent of S. Francisco, as well as for interested lay people because "here" both "are very ignorant" (translated)<sup>523</sup>, which was still the case, despite the appointment, eight years earlier, of Canon Pedro Pereira as Director of General Studies in Madeira.

After the creation of the Literary Subsidy intended to support the expenses with the first degree of education, Madeira was to receive six masters of Reading, Writing, and Counting, three of Latin Grammar, one of Greek (which it is not known if went or not), one for Rhetoric, and one for Philosophy<sup>524</sup>. In 1774, the professor in charge of Rational Philosophy, Francisco Manuel de Oliveira (1741; c. 1812), offers the prayer of wisdom, with which he inaugurates his regency in the church of S. João Evangelista, previously held by the Society of Jesus<sup>525</sup>, which is not without a symbolic meaning. In 1766, by royal provision, the Reverend Dr. João Francisco Lopes Rocha was sent to teach Rhetoric<sup>526</sup>, curiously, a self-confessed freelancer and theologian graduated from the University of Coimbra in 1769<sup>527</sup>.

The process, however, is quite slow, taking the deadlines for decisions and implementations into account. This is one of the limitations imposed on Pombal's reforming purposes, given that the reality of the peripheries does not fit or follows the will of the center. The teaching of a more "professionalizing" nature, which is also a hallmark of the Mar-

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<sup>523</sup> *Ibidem*, GC, L<sup>o</sup> 530, fl. 26.

<sup>524</sup> *Idem*, CMF, RG, Tomo 12, fl. 5 – *Lei porque Sua Majestade impõe o donativo nos vinhos, aguardentes e vinagres para pagamento dos Mestres de Aulas e Escolas*, November 10, 1772.

<sup>525</sup> Son of António Dionísio de Oliveira and Micaela Jerónima Mayringk, names and nicknames linked to Funchal customs. He was appointed professor of Rational Philosophy by the royal letter of January 5, 1774, with the provision of the Censorship Table signed by the bishop of Beja, and took office on February 24 in the church of the Funchal College, in the presence of the "most important people", pronouncing on the occasion of the inauguration his "prayer of wisdom". He would be retired by letter of June 28, 1799, passing his position of effective teacher to José Maria de Afonseca and dying around 1812.

<sup>526</sup> ABM, ARM, CMF, Tomo 12, fls. 35v e 47.

<sup>527</sup> *Cit.* Fernando Taveira da Fonseca, "A reforma da Universidade de Coimbra (1772) e o seu reflexo na sociedade insular", communication to the colloquium *As Sociedades Insulares no Contexto das Interinfluências Culturais do Século XVIII*, Funchal, Oct. 1993, *Actas, Id.*, CEHA, Mar. 1994, p. 47.

quis, emerges, in turn, with the creation of the Madeira Fortification School, discussed in more detail later<sup>528</sup>.

## THE REORGANIZATION OF THE GOVERNMENT OF MADEIRA

Governor João António de Sá Pereira, “*o Pombal madeirense*” [the Pombal from Madeira], as he later became known, carried out a notable action at the head of Madeira. He had enlisted in the Penamacor Dragons Regiment, being promoted to captain of the Cavalry Regiment of Almeida in 1757, later serving in the 1762 campaign of the *Spanish–Portuguese War*, in the so-called *Fantastic War*, as Colonel of Infantry of Chaves’ regiment. He also carried out the Beira campaign under the orders of the English Lieutenant General George Townshend (1724-1807), fourth Viscount of the title and later Marquis, thus making contact with the entire reformist policy of Count Schaumburg-Lippe (1724-1777), who surpassed the field of military organization and pointed to a globalizing and strategic way of understanding power. In this context, if in Portugal, the office of the Marquis of Pombal embodied almost perfectly the so-called “enlightened despotism” or “enlightened”. In Madeira, this form of government was perfectly assumed by Sá Pereira<sup>529</sup>.

As soon as he arrived, Governor Sá Pereira had taken care to request directives from his *uncle*, Sebastião José de Carvalho e Melo, a form of treatment that other governors of the Empire also used and that, in a way, reached our days in certain social strata. In a private and autograph letter, among other matters, he addresses a donation of 600\$000 *réis*, “in cash to satisfy this Court” (translated) in Lisbon. The donation had been made to his predecessors by the community of English merchants on Three Kings’ Day, “to always have it available, in order to better continue with the great interests drew from this Island”

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<sup>528</sup> Rui Carita, “A aula militar ou escola de fortificação do Funchal: As aulas regimentais da Madeira e o sargento-mor Francisco de Alincourt, 1768”, in *XXI Congresso de História Militar, Atas. Nos 250 anos da chegada do Conde Lippe a Portugal: necessidades, reformas e consequências da presença de militares estrangeiros no Exército Português*, Portuguese History Commission, 2013, pp. 227-236.

<sup>529</sup> João António de Sá Pereira (c. 1730-1804). Son of Manuel de Sá Pereira and Mariana Plácida de Meneses, he had served in the 1762 campaign, as an infantry colonel. He had an adviser’s letter of 15 Sep. 1766 (IAN/TT, *Chancelaria de D. José I*, L<sup>o</sup> 20, fl. 253); of Governor and Captain General of Madeira Island, on the same date, (*ibidem*, *idem*; and *idem*, PJRFF, L<sup>o</sup> 975, fls. 181v-185); standard letter of 12\$000 to have with the habit of Christ, 12 Sep. (ditto, ditto); paid homage, at the Ajuda Palace, on 25 Sep. 1766; salary permit as governor of Madeira, on 10 Oct. 1767 (*ibid.*); and inauguration in Funchal, a year later, on 9 Dec. 1767. He left Madeira on 10 jun. 1777, with a letter from the Baron of Alverca and the landlord of that village, on 3 and 4 abr. 1795 (IAN/TT, *ibidem*, L 19, 172v.); baron settlement letter, 15 jun. 1795 (*ibidem*, L<sup>o</sup> 27, 362). He died in 1804 as a field marshal in the Army, without offspring. The title passed to his brother José António de Sá Pereira, second Baron of Alverca and first Count of Anadia, being uncles of the future Chief of Staff João Rodrigues de Sá e Melo (1755-1809), Viscount of Anadia.

(translated)<sup>530</sup>. The governor says that on the day in question, he had taken care to leave very early, so as not to have to receive or refuse the aforementioned donation, taking the opportunity, at the same time, to find out about its origin.

The governor, on the other hand, does not fail to show his need for it, not only because of his previous economic situation<sup>531</sup>, but also given his position as governor of Madeira. His secretariat did not have any maintenance budget, receiving 600 réis every three months for each official provision that did not have an owner and another 600 réis for the departure visas of vessels from the port. He emphasizes, however, that some trades had such tenuous incomes that their usufructuaries refused to take advantage of them. Therefore, these fees nearly did not cover the secretariat's paper and seal expenses. He then takes the opportunity to mention that the secretariat was totally disorganized, "in great irregularity and confusion", "with shapeless and tiny books, without being numbered and initialed" (translated) so little faith could be placed in them, finding themselves doing everything all over again.

In the middle of the 18<sup>th</sup> century, the organization of the military area in Portugal, especially with all the work of the reconstruction of the city of Lisbon, is intimately linked to the whole complex area of the great public works that are, in turn, connected to the general development of the cartography. This means it is always accompanied by notes and reports, not only in relation to the productive occupation of the land, but also to the resident populations, essential for a visual documentation of governmental decisions. All these aspects become evident in the action of the governor João António de Sá Pereira, including the fact that one of the most ambitious projects of the time was underway: the construction of the floating pier at the port of Funchal.

The governor circled through the island<sup>532</sup>, finding out about its problems and dispatching the most urgent matters immediately and "in loco", regardless of São Lourenço, on whom his predecessors would depend. In Funchal, the governor also periodically resided at Quinta do Pico, a former property of the Jesuits. This situation had already happened occasionally with his predecessor and would happen with his successor. With the progressive Pombaline centralization and the integration of the captaincies to the

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<sup>530</sup> AHU, *idem*, cataloged, cx. 2, n° 318. Letter of April 30, 1768.

<sup>531</sup> "No one knows better than Your Excellency the poverty I found myself in when I left for this government, and this would be total if Mr. Francisco de Mendonça (brother of the Marquis?) did not help me with what I needed for the transport, and made of his greatness" (translated). Later on, he does not fail to ask his uncle not to forget to "untangle my wife's order for me (D. Luiza Maria Antónia de Moraes Sarmiento Pimentel), whose papers will be in the hands of João Gomes de Araújo, or the Father João Baptista, because only with the fallen will I be able to help my performance" (translated), adding that only with a certain economic independence could he come to play the role well.

<sup>532</sup> AN/TT, *PRFF*, L° 977, fls. 263v-264. Jun. 1774: *Pagamento da viagem do governador Sá Pereira ao Porto do Moniz, em inspeção*.

Crown, he became interested in the catastrophic situation of Porto Santo, where he sent the engineers Francisco de Alincourt (1733-1816) and Faustino Salustiano da Costa e Sá (1747-1816). He also went later to that Island personally, where he developed a wide, innovative, and interesting work, which similarly happened with the entire area of justice, here also extended to other annex areas, with the ombudsman of captaincies, the court of organs and chapels, such as the general reorganization of society with the Laws of Police, *Good Reason*, registration of favors, and so on.

## THE REORGANIZATION OF THE MILITARY AREA

With the inauguration of Sá Pereira at the end of 1766, some restructuring took place immediately, including the appointment to a position, in a certain original way: “a war officer capable of taking care of the fuses of the doors of this city and mouths of streams and more wood belonging to the bridges” (translated). The patent was issued at the proposal of Captain Engineer Domingos Rodrigues Martins (c. 1710-1781) and Gaspar Raimundo Homem del Rei took it over. In the patent letter, it is mentioned that “in the absence of the inspector of the royal works and in any other accident, this officer was obliged to attend all the works of the fortification” (translated)<sup>533</sup>. However, we have no further reference to this position or this officer.

The new governor of Madeira must have quickly realized the need for a military engineer with a whole different background, as it was not possible to carry out the work on the port of Funchal and others with a master of the royal works exercising engineering, like Domingos Rodrigues Martins. It was certainly at his request and by order of D. José to the Count of Lippe, who was proceeding with the restructuring of the entire military area in Portugal, that the engineer Francisco de Alincourt was sent to Funchal<sup>534</sup>. He arrived at the end of 1767, as sergeant-major, with six years of engineering practice and conscription in the list of the first court plan, receiving 52\$000 réis per month in double pay. The royal order for the movement mentioned in the patent was addressed “to the reigning Count Setiaurnbourg Lippe, my much loved and cherished cousin” (translated)<sup>535</sup>

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<sup>533</sup> ABM, ARM, GC, L<sup>o</sup> 532, fl. 42. Funchal, February 6, 1767.

<sup>534</sup> Son of Luís de Alincourt, born in Flanders, he had a patent dated from Lisbon, May 11, 1767, taking office in Funchal on December 10, 1767 and registration at the Treasury, on January 28, 1768 (He was a colonel of Engineering and was 81 years old, when he was given a negative certificate on March 9, 1803 (IAN/TT, *Chancelaria de D. Maria I*, L<sup>o</sup> 12, fl. 174; *ibidem*, *Registry of certificates*, L. 1, fl. 139), although he only died in 1816, due to his advanced age for the time of around 94 years.

<sup>535</sup> IAN/TT, *Provedoria da Real Fazenda do Funchal*, L<sup>o</sup> 975, fls. 180v-181; *idem*, fl. 193 v<sup>o</sup>.: *Carta de guia com que se apresentou*. Lisbon, Belém, 3 set. 1767; Registration in Funchal, December 12, 1767 and March 28, 1768; *idem*, ARM, GC, L<sup>o</sup> 526, fl. 30. Governor’s letter to the treasury provider. Quinta do Pico, July 7, 1768.

apparently not having passed through the then Secretary of War and Foreign Affairs, D. Luís da Cunha Manuel (1703-1775).

Sergeant-major Francisco de Alincourt was paid until August of that year, 1767, as captain of infantry and with “two months’ pay in advance, about 52\$000 réis per month, as sergeant-major and on the aforementioned Island, he must be paid from November first onwards” (translated). The arrival of Francisco de Alincourt was certainly related to the continuation of the works on the port of Funchal, of which we know of a project to unite the two islets, dating from 1771, but which did not leave the pages at that time<sup>536</sup>. His main works, however, correspond to the assembly of the Funchal Fortification School and the work for the survey of the general plan of the island of Madeira. Faustino Salustiano da Costa arrived to help him in mid-1768, “an extra numerary disciple of the Military Academy of the Fortification of the Court” (translated). He came with the patent of an infantry assistant and six-year engineering experience, receiving 10\$000 réis a month<sup>537</sup>. He ended up staying on the Island, initially, until January 1775<sup>538</sup>.

Of the first works that these engineers were in charge of, one was the planning of the Rabaçal levada. Thus, on October 8, 1768, they were ordered to go “directly to the village of Calheta” (translated), where they should contact Dr. Francisco Cristóvão de Ornelas e Vasconcelos or, in his absence, the ordinary judge of the village to inform them about the “*Rabaçal Levada*”, of which they should survey the plan, as well as the properties of the bards<sup>539</sup>. The matter concerned the increase in irrigated land in the areas of Calheta and Ponta do Pargo, a matter that had preoccupied the governors since the middle of the century, but which would only be resolved in the following century by military engineers António Pedro de Azevedo (1812-1889) and Augusto Tiberio Blanc (c. 1810-1875).

The need for a *School of Geometry and Trigonometry* in Funchal must have come to light during the time of the engineer Francisco Tossi Colombina, in exercise from the begin-

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<sup>536</sup> *Pranta dos dois ilheos com seu projeto para os fichar*. India ink and watercolor on paper D. & C. Blauw, 485 x 375; 510 x 395 mm. *Petipé* of 19,3 cm. = 60 fathoms (approx. scale 1/700). Signed: *Francisco d’Alincourt, sargento-mor de Engenharia, Funchal, 1771*. Center for Ancient Cartography Studies (nº 18, file 34). There are preparatory sketches for this project in the Office of Archaeological Studies of Military Engineering (nº 1309, 2-22A-109). Cf. AHU, *ibidem*, n.ºs 312, 345 e 346. Governor’s Letters on the Advantage of Closing the Islanders. Funchal, April 2 and August 30, 1768.

<sup>537</sup> IAN/TT, *PJRFF*, Lº 975, fls. 205v-206. Lisbon, June 18, 1768; Funchal, July 9 and 11, 1768.

<sup>538</sup> *Ibidem*: Note in the margin; “*Foy pago pela Provedoria até fim de janeiro de 1775 e dali em diante, não continuou...*” [He was paid by the Office of the Provider until the end of January 1775 and thereafter did not continue...]. It should be noted that Salustiano da Costa also went to the island in 1777, but returned immediately to Lisbon, as one can see in another note in the margin.: *idem*, Lº 976, fl. 103: “*Foi pago até 31 de janeiro de 1775. Regressou a 16 de maio de 1777 e foi-se a 10 de junho do dito*” [He was paid until January 31, 1775. He returned on May 16, 1777 and left on June 10, 1777].

<sup>539</sup> ABM, ARM, GC, Lº 526, fl. 41. Funchal, October 8, 1768; *ibidem*, Lº 530, fl. 50. Letter from October 31, 1768.

ning or mid-1757. The survey of the works on the port of Funchal, with the connection of the small islet to mainland, construction of the wharf pier, the Pontinha road and the São José fort, certainly required qualified personnel. At that time, the only technician on the island was the engineer captain Domingos Rodrigues Moniz, who would be re-appointed master of the royal works on the island of Madeira on January 1, 1760<sup>540</sup>, which was clearly insufficient. However, the establishment of the military school did not have a real implementation, given that soon Tossi Columbina was removed and, immediately, taken advantage of by the former governor of Madeira, Manuel de Saldanha de Albuquerque, then Count of Ega and appointed viceroy of the India, to accompany him to the East.

The works were started or reactivated during the term of sergeant-major Francisco de Alincourt, who went to Lisbon to collect the necessary material<sup>541</sup>, then, he brought several materials from the continent for the Class, such as “12 translation games of Belidor” (translated)<sup>542</sup>. Later, the helper Faustino Salustiano da Costa delivered “by an English ship, the material requested” (translated), as reported to the governor in June 1768. The English ship *Riotte* carried 2 clipboard nozzles, 100 pickaxes, 68 stretchers, a dome tent, and a measuring chain, with 20 fathoms, among other instruments<sup>543</sup>. In October of that year, Lisbon was also being asked for a “theodolite” (translated)<sup>544</sup>.

At the end of October 1768, the governor informed Lisbon of the opening of classes, for which he had ordered public notices to be posted. The reason for that was that, among all the paid troops on the island, both infantry and artillery, he had not found more than two or three “subjects with aptitude and willingness to enter and learn in the Engineering Class” (translated). Civilian elements, around 20 years old, had been recruited, knowing how to read, write, and count. In the end, the Class was opened with 14 or 15 elements. They had been examined and enrolled, in the presence of the governor himself, who was enthusiastic about the experience, adding in his letter: “It is certain that these natives of the Island are not lacking in skill, if they want to make themselves useful” (translated)<sup>545</sup>.

Later, Governor Sá Pereira informed Lisbon of the first classes he had attended and where “complicated explanations had been given by sergeant-major Francisco de Alin-

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<sup>540</sup> IAN/TT, *idem*, L<sup>o</sup> 975, fl. 133 v<sup>o</sup>.: *Provimento de mais um ano...* Lisbon, April 23, 1760, record from August 7, only registered, however, on September 22, 1766.

<sup>541</sup> ABM, ARM, GC, L<sup>o</sup> 530, fl. 78. He was in Lisbon on April 30 and July 5, 1768.

<sup>542</sup> Bernard Forester de Belidor (1698-1761), certainly, *La Science des Ingenieurs dans la Conduite des Travaux de Fortificatione Et d'Architecture Civile*, Paris, Claude Jombert, 1729, but in handwritten translation, as there was, to our knowledge, no Portuguese edition.

<sup>543</sup> ABM, *Ibidem*, L<sup>o</sup> 526, fl. 29 e 37. Lisbon Letters, Ajuda Palace, June 14 and 22, 1768; *ibidem*, L<sup>o</sup> 530, fl. 36. Lisbon, July 24, 1768.

<sup>544</sup> *Ibidem*, L<sup>o</sup> 530, fl. 70 v. Funchal, October 31, 1768.

<sup>545</sup> *Idem*.

court, of which no one understood anything” (translated). The governor did not like Alincourt’s performance, who “returned to the island’s plan” (translated). The assistant Salustiano da Costa replaced him. On the second of November of the following year, 1769, there were already “public exams in the College bookshop” (translated), which the governor also attended, later sending them to Lisbon and emphasizing the dispatch of two drawings by pen, made by 13-year-old students. João António de Sá Pereira highlights, at the end of his letter, that, in view of the development of the classes, “His Majesty [would soon be] served... by subjects quite capable of being officials, for they truly dedicated themselves thoroughly studying” (translated)<sup>546</sup>.

The work to survey the map of the island of Madeira must have started in the middle of the year 1768<sup>547</sup>. Moreover, according to the directives of the governor António de Sá Pereira, they should start in the church of Santiago, “at the edge of the city, towards the east” (translated). For this purpose, the supply of “pension and food” to engineers was determined in the form of “house, bed, light, salt, and firewood” (translated). By order of the governor, dated from Quinta do Pico, on June 7 of that year, the performers should also be “satisfied with horseback riding” (translated), which raised some doubts. It was then suggested by the governor himself to supply two horses to the sergeant-major and one to the assistant – something to be done “every day that the diligence they were [entrusted with] lasts” (translated). As there was no fee determined by the Board for this, it met to resolve the situation. The team was also reinforced with two men to help measure the land, with the governor asking each one to pay 300 *réis* per day. In October, the “provisional plan of Serra da Encumeada and its belongings” (translated) was concluded<sup>548</sup>.

Work continued in the middle of the following years, 1769 and 1770, when the two men who accompanied sergeant-major Alincourt were asked a raise from 300 to 400 *réis* “in the survey of plan of the Island”<sup>549</sup> and the payment of two horseback riding to Salustiano da Costa – “one for him and one for the instruments he carries” (translated)<sup>550</sup>. In mid-1769, the engineers still traveled with the corregidor to Porto Santo, drawing up a

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<sup>546</sup> *Ibidem*, fls. 45-46, 70v-71 e 121v.-122. Funchal, October 13 e 31, 1768 and November 6, 1769; *idem*, AHU, *idem*, cx. 2, n.º 372. Governor’s letter, Funchal, November 6, 1769.

<sup>547</sup> ARM, *idem*, fls. 43v.-46. Copy of the orders to the sergeant-major with instructions on the “*carta typographica*” [typographic letter] and letter about the “*difficulties of the letter*”, São Lourenço, October 12 and 13, 1768.

<sup>548</sup> IAN/TT, *idem*, Lº 976, fls. 207 vº, 215 e 221 vº a 222 vº: Quinta do Pico, July 7, records from 12 and 15 fo the same month; Fortaleza de São Lourenço, October 6, record from November 8 and, *idem*, 12, record from 14, all of it in 1768.

<sup>549</sup> *Ibidem*, fls. 10v-11: Funchal, São Lourenço, May 31, 1769, record from June 1.

<sup>550</sup> *Idem*, fl. 42. Works since December 13, 1769 and until April 1770. Order of Saint Lawrence, April 20, 1770. Registration at the Office from the same day.



*Description* of the island, as well as its plan<sup>551</sup>. The work continued in 1771, at that time only under the responsibility of Salustiano da Costa, given the arrest of the sergeant-major in December of the previous year. The sergeant-major had been involved in several irregularities, embezzlement of funds, and probable falsifications in the work records, even trying to flee to Lisbon, so the governor claimed to have had no choice but to have him arrested.

The Island was frankly prone to certain irregularities, but it seems that the engineer had gone far beyond what had been assigned to him. As the governor explained to Lisbon and according to the files raised by the inspector Francisco Moreira de Matos, the sergeant-major had illegally prosecuted the “vacation paid to laborers who worked on the fortification project” (translated), a matter unfit to his position, as already mentioned, but to that of Captain Domingos Rodrigues Martins. However, Alincourt had pressured the treasurer António João Homem del Rei, untruthfully saying he had orders from the governor to do so. When asked about his procedure, he promised to replace what he had taken, thus confirming that there had been deviations. The governor wrote to him on February 2, mentioning “that your confession better qualifies your crime than your innocence, of which Your Grace wants to persuade me by letter...” (translated). In fact, the sergeant-major had added two names to the list of laborers on the works: Miguel Ferreira and Francisco Marques, who did not exist, as well as debiting the expenses incurred by the master carpenter of German origin, Matias Guerelink, with “frets that he made him for the decoration of his house, whose evaluation is in the hands of the pointing captain António João Homem del Rei” (translated)<sup>552</sup>.

The sergeant-major, in spite of everything, was a highly qualified technician and, replacing the expenses illegally debited, the governor still forgave him, sending an order to Machico, according to which he was to travel to Porto Santo to “inform the people, design the fortifications, and draw up the Island chart” (translated)<sup>553</sup>. It should be noted that the fortifications, in general, were the responsibility of the master engineer of the royal works, Domingos Rodrigues Martins, but he was otherwise engaged with tasks related to the college and the old Jesuit church. For such job, by the way, he received the payment

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<sup>551</sup> *A Dissertação da Ilha do Porto Santo à que foi mandado por ordem do Illmo. e Exmo. Senhor João António de Sá Pereira, do Conselho de Sua Magestade, Governador e Capitão General da Ilha da Madeira; o Sargento Mor Engenheiro Francisco de Alincourt, em 20 de Abril de 1769, para observar as suas particularidades e motivos da sua annual necessidade, levantando planta geral do seu continente e Ilhéus a ella adjacentes*, available at AHU and the plan of Porto Santo, signed and dated by Salustiano da Costa, in a copy from 1775, in the former Office of Ancient Cartography of the Overseas Research Board.

<sup>552</sup> ARM, GC, L<sup>o</sup> 526, fls. 67-68v. e 88v.-89. Funchal, February 2 and 27, 1769; *idem*, L<sup>o</sup> 530, fls. 72 e 80; *idem*, AHU, *idem*, n<sup>os</sup> 349-351. Governor’s letter, with attached record. Funchal, February 12, 1769.

<sup>553</sup> *Ibidem*, fls. 99-101. Letters and orders from April 19, 1769; *Idem*, fls. 117v-118. *Idem*, Funchal, October 16, 1769; *Idem*, fls. 124v.-129v. *Idem*, to the Count of Oeiras, Funchal, February 8, 1770.

referring to the two previous years of work in August of that year, although only 100.000 *réis* when his salary should have been 200.000 *réis*<sup>554</sup>.

The engineer had done an exceptional job in Porto Santo, as previously mentioned, which he signs as a “professed knight in the Order of Christ, director of the Fortification works, and lens of the Royal Academy” (translated)<sup>555</sup>. Meanwhile, the assistant had to continue the work on Porto Santo. The latter later signed incidentally the Porto Santo letter, passing Alincourt on to the map of the island of Madeira. In March 1770, the sergeant-major had orders to draw up the “central map of the Island” (translated). In turn, in April, the plan of the city of Funchal had already been developed “from Santiago to the São João stream” (translated). Also in April, there is a reference to another work: “the new levada, which starts in Pico Ruivo” (translated)<sup>556</sup>. However, Francis de Alincourt’s arrest warrant was soon issued again, “for fair reasons of His Majesty’s service” (translated), dated December 1, 1770<sup>557</sup>, with no further references to him on the Island, having immediately embarked to the mainland. Salustiano da Costa had, nonetheless, been appointed assistant to the governor “without pay”<sup>558</sup> (translated), and went to Lisbon, under an authorization issued in August 1771<sup>559</sup>, requesting later, in 1772, the overdue payment for the horses from his attorney José Anastácio da Costa<sup>560</sup>.

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<sup>554</sup> *Idem*, fl. 111. *Domingos Rodrigues Martins, mestre das obras da fortificação: reparos dos consertos no colégio que foi dos jesuítas, e nas capelas da Igreja: cem mil réis pelo trabalho de dois anos*. Funchal, August 6, 1769.

<sup>555</sup> AHU, *idem*, n.º 366. Funchal, July 9, 1769.

<sup>556</sup> ARM, *idem*, fls. 136v.-137. Governor’s letters from March 21 and April 26, 1770.

<sup>557</sup> *Ibidem*, fl. 172. Governor’s letter to the treasury provider. Funchal, December 1, 1770; *idem*, IAN/TT, *idem*, fl. 69. “*Por motivos do serviço de Sua Majestade mandei prender o sargento-mor engenheiro Francisco de Alincourt e suspendê-lo do serviço do seu posto até nova mercê de Sua Majestade. São Lourenço, 1 de dezembro de 1770*” [For reasons of His Majesty’s service, I had the engineer sergeant-major Francisco de Alincourt arrested and suspended from the service of his post until further mercy from His Majesty. *São Lourenço*, December 1, 1770]. Record from the same day; *Idem*, Lº 975, fl. 101: “*Por aviso do Ilustríssimo e Excelentíssimo governador João António de Sá Pereira está suspenso o sargento-mor engenheiro Francisco de Alincourt até nova mercê de Sua Majestade e por isso pus esta nota à margem da sua patente...*” [By notice of the Most Illustrious and Honorable Governor João António de Sá Pereira, the engineer sergeant-major Francisco de Alincourt is suspended until further mercy from His Majesty and that is why I have placed this note in the margin of his patent...]; *Idem*, Lº 976, fl. 69.

<sup>558</sup> IAN/TT, *idem*, fl. 49. Funchal, August 31, record from September 11, 1770. Cf. ARM, *idem*, fl. 155 v. Letter to the captain of the Room Alexandre Nicolau de Atouguia e Freitas on the appointment, dated August 30, from Faustino Salustiano da Costa, ordering that the captain of the room, plus the captain of the week, Manuel de Sousa Caldas and more assistants from the same room gathered to watch the reading of the nomination. Funchal, September 12, 1770.

<sup>559</sup> *Ibidem*, fl. 103. Governor’s order from August 15, 1771 and record from the next 17. The question arises before the note in the margin “It was paid until January 31, 1775...”, already mentioned, which seems to indicate that the payment would only have taken place later.

<sup>560</sup> *Idem*, fls. 189-191v. The petition cites the fees in use in the province of Estremadura and the debt then amounting to 264\$600 *réis*. São Lourenço, August 1, 1772, record from 13 of the same month and year.

It remains to be added that other reasons led to the arrest of Francisco de Alincourt, especially concerning his involvement with elements of the masonic lodges in Funchal. Documentation in this regard seems to have arrived in Lisbon at the same time as the sergeant-major, despite the order from the office of the future Marquis to release him to continue his engineering service on the continent for many years, as we have already written, until his retirement, in March 1803. He only died in 1816.

## THE CENTRALIZATION OF JUSTICE AFFAIRS

The main step of this long path took place in the following decade, corresponding to three important pieces of legislation: the Law of Royal Confirmations, the *Law of Good Reason*, and the Letter of Law on the provision and use of offices. With these legal acts and the creation of the Board of Confirmations, annexed to the Tombo Tower, which began to work on May 6, 1769, the long road to the inspection of inserts abuse began. Additionally, to a certain extent, it was also along this path that the extinction of the island captaincies was achieved. On the other hand, with the *Law of Good Reason*, the customary practice that had legally legitimized the patrimonialization of offices from fathers to sons and even to daughters no longer had any legal basis<sup>561</sup>.

Later, with a Letter of Law from November 23, 1770<sup>562</sup>, which regulates the provision of offices, radically attacking the old customary law and the right of transferability, paved the way to the publication, in 1777, of the new *Regiment of Award Registry*. The letter of law of 1770 resulted from a consultation of the Board of Confirmations and referred to the “essential repugnance, which contains the passing on to unskilled children and successors of Offices which, by their nature, require their own and personal industry of those who must serve them, not for their particular interest, but for the public utility, which made their creation necessary” (translated). In this sense, this law distinguishes the offices of justice and treasury as special assets of the Crown and requires the provision of services with “reputation and legitimacy” (translated)<sup>563</sup>. However, as we will write, mainly in areas such as Madeira, borders of court power, it was a long road, which had several successes and setbacks.

In carrying out the instructions received in a letter dated February 1, 1768 and sent directly to the Count of Oeiras, the governor explained his first impressions of Madeira. These included the urgent need for two Judges for Machico and Calheta, as well as the appointment of a Waste Provider, who should accumulate this position with that of judge

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<sup>561</sup> See about this José Subtil, “Os poderes do Centro”, *Op. Cit.*, p. 188.

<sup>562</sup> ABM, ARM, *CMF*, T 11, fl. 188. *Lei sobre a propriedade dos ofícios*, Lisbon, November 23, 1770; Funchal, July 23, 1771.

<sup>563</sup> *Cit.* José Subtil, *Op. Cit.*

of Funchal<sup>564</sup>. This information had been obtained from the governor of the new magistrate, Francisco Moreira de Matos, the first occupant of the Internal Affairs Department of Funchal, a body under the General Intendance of the Police that had emerged in the kingdom on June 25, 1760 and which was created in Madeira through the charter of October 16, 1767<sup>565</sup>. The King then considered that the presence of a corregidor with equal jurisdiction to that of the General Intendant of the Police of the kingdom was justified in view of “the serious disorders that often occur on the aforementioned Island due to the lack of Police” (translated). One should bear in mind, nonetheless, that the term Police meant, at the time and according to Bluteau: “The good order observed and the laws that prudence establishes for human society in Cities, Republics, etc.”, adding later that the concept also applied “to dealing, conversation, and customs” (translated)<sup>566</sup>.

In 1766, by royal decree, D. José extinguished the donatary captaincies of the Azores and replaced them with a Governor and Captain General, whose powers were defined in a Charter of Law and Regiment delivered to the new governor, D. Antão Almada (1718-1797). Along with it, another document of a much more private nature regulated the roles: “*Instrução Particular que Sua Majestade manda expedir ao Governador e Capitão General Dom Antão de Almada, para o seu governo secretíssimo nas disposições que deve fazer nas Ilhas dos Açores*” [Private Instruction that His Majesty orders to be sent to the Governor and Captain General Dom Antão de Almada for his very secret government in the dispositions he must make in the Azores Islands], which is also applied in Madeira. The reason for the extinction of captaincies has to do with the need to replace a primitive and already ineffective administrative system with one more suited to the times, that is, one that allowed greater centralization and control by the Crown.

In order to achieve these objectives, the two texts referred to above defined, in a more or less generalized way, the powers attributed to the various agents of the Crown in the archipelagos. The changes started with the duties of the governor himself, to whom new responsibilities were entrusted, namely the supervision of the Treasury to guarantee provision for literate officers of justice, and also in the area of justice, in which it was defined that “As far as Civil and Political Government is concerned, the [...] Governors [...] will

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<sup>564</sup> ABM, *idem*, GC, L<sup>o</sup> 530, fl. 4. This opinion was also based on that expressed by the magistrate Francisco Moreira de Matos, who had written a letter to the governor on the most urgent measures to be taken in the scope of the application of justice and which one can find at AHU, *ibidem*, cx. 1, doc. 288.

<sup>565</sup> *Idem*, CMF, Tome 11, fls. 66-70. For an analysis of issues related to the installation of internal affairs in Madeira, see Rui Carita, *História da Madeira*, vol. V, SRE, Funchal, 1999, pp. 221-231 and *História da Madeira*, vol. IV, SRE, Funchal, 1996, pp. 180-185.

<sup>566</sup> Rafael Bluteau, entry “Polícia”, in *Vocabulário Português e Latino oferecido a El-Rei de Portugal D. João V*, vol. VI, Lisbon, 1722, p. 575. On this subject see also José Damião Rodrigues, “Para o Sossego e tranquilidade publica das Ilhas: Fundamentos, ambições e limites das reformas pombalinas nos Açores”, *Revista Tempo*, n.º 11, Universidade Fluminense, 2006, pp. 144-170.

exercise all the fulfilled jurisdiction that the Regidor of Justices of the Court of Appeals, the Governor of Porto Relation and Court and the Governor [...] of the Kingdom of the Algarve fulfill” (translated)<sup>567</sup>. Based on that, one can conclude that the governor effectively had judicial powers. Despite the attempt to clarify the governor’s powers, they remain too undefined, not clearly delimiting the circumstances in which Sá Pereira could intervene judicially, which will often lead to the governor having his jurisdiction questioned – this aspect ended up proving to be one of the major constraints of the intended justice reform.

The governor thus became “regidor of justice”, having the district magistrate present himself in the fortress of São Lourenço, along with all his officers, duly identified, to accompany him in the procession. The order was perfectly expressed: “*Saturday, June 2, at 2 pm, Your Grace will present yourself in the room of the fortress of my residence, with insignia of your jurisdiction, together with the justice officers you have at your position, for the purpose of accompanying me in the vespers attendance, which will be celebrated in the church of Our Lady of Calhau*” (translated). Equally on the following day, “*Your Mercy and your respective officers*” were to accompany him in the celebrations of the Easter feast of the Holy Spirit<sup>568</sup>. As the governor later explained to Lisbon, it was not a matter of whim or of wanting to present more prerogatives than his predecessors, but rather of effectively assuming the position he was responsible for as regidor of justice.

Of course, this position of the governor was immediately challenged by the Funchal council in their following meeting, on June 16, 1770, determining that “His Majesty should handle what the doctor corregidor of the district of Funchal had done on the 14<sup>th</sup> current day” in the procession of the Body of God. In the previous year, 1769, the governor placed himself between the first and second councilors, followed by the corregidor between the county attorney and the clerk. With this change from the governor, the corregidor was placed behind him, in a “preferred place” and in the middle of the chamber, which was against His Majesty’s orders, “by which the same Lord commands that no one precedes the body of the chamber formed, as it represents His Real Person” (translated)<sup>569</sup>. The city council representation must have had no response, as the council no longer represented “the Real Person”.

In order to better fulfill his duties, the governor was also asked for information regarding the state in which he had found the island territory, namely by sending a wide range

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<sup>567</sup> José Guilherme dos Reis Leite (dir. and coord.), *O Códice 529 – Açores, do Arquivo Histórico Ultramarino, “Fontes para a História dos Açores”, Angra do Heroísmo-Ponta Delgada, Regional Secretariat for Education and Culture/Regional Directorate for Cultural Affairs – University of the Azores/Gaspar Frutuoso Studies Center, 1988, p. 31.*

<sup>568</sup> *Idem, GC, L° 526, fls. 143 v e 144.* Order to the doctor corregidor Francisco Moreira de Matos, Funchal, São Lourenço, May 31, 1770.

<sup>569</sup> *Idem, CMF, L° 1539, fls. 29 a 30.* Council of June 16, 1770. Reading by Dr. Luis Francisco de Sousa Melo.

of “reports”, many of which were prepared by the corregidor, on which the central power could base decisions and which constitutes, in itself, one of the characteristic and most successful marks of the Pombaline *modus operandi*. Francisco Moreira de Matos proved to be an energetic and hardworking man, as per the number of corrections he carried out all over the island in 1766 or the eleven corrections he undertook in Funchal and Ponta de Sol alone between 1767 and 1776<sup>570</sup>.

Despite all the corregidor’s efforts, in 1768 the governor clarified to the royal power that he was also doing what he could “so that these peoples enjoy the good administration of justice, whose face they never knew: the interest and power of each one was the judgment of the balance” (translated). Even though, he recognized the good help he received in the matter from the Ministers available and who would correspond to the literate who came from the kingdom, because “everyone effectively takes care of their obligation with great disinterest” (translated)<sup>571</sup>.

This lack of interest was fundamental, because both the governor and the magistrate considered that the application of justice by lay people and natives of the land generated enormous non-compliance with the law. Francisco Moreira de Matos well observed, regarding the existing provider of orphans and waste, that he was unfit for the position for being a “layman, reputed by Hidalgo and the Majorats of the island, who naturally must be in love with his natives and relatives” (translated)<sup>572</sup>. The governor spoke of the same character, claiming that “being a native of this Island and its Gentlemen, and related to most of its Nobility, he remembers more of the living than the dead” (translated)<sup>573</sup>.

This interventionist stance on the part of the governor was far from gaining general approval. The poorest people he defended through decisions taken within the colony had nothing to oppose. Nonetheless, the same did not happen with the local elites who, seeing the privileges they considered rightly their own, fought with the weapons at their disposal against the rigor that was intended to be installed, as, by the way, it happened in the Azores<sup>574</sup>. On April 26, 1768, Sá Pereira congratulated himself because people on the island were beginning to know “what the Police are, whose law seems to me to have been ignored here: the streets are almost all illuminated and the disorders that there were in them are being extinguished” (translated). However, it did not take long for him to change his mind, complaining, in a letter sent to the Secretary of State for the Navy and Overseas

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<sup>570</sup> Rui Carita, *Op. Cit.*, 1996, pp. 182-183.

<sup>571</sup> ABM, *ibidem*, GC, L<sup>o</sup> 530, fl. 6v.

<sup>572</sup> AHU, *Op. Cit.*

<sup>573</sup> ABM, *ibidem*, fl. 40.

<sup>574</sup> José Damião Rodrigues, *Op. Cit.*

Affairs, that the lack of exact instructions on its jurisdiction “considerably weakens any resolution of mine in a land as critical and as absolute such as this one” (translated)<sup>575</sup>.

Advances and setbacks, successes and failures characterize José António de Sá Pereira’s action in favor of justice, as well as that of the magistrate Francisco Moreira de Matos, who also experienced various difficulties in his work on the island. The struggles include the lack of accommodation, a detail of a practical but not negligible nature, the reduction of income from goods confiscated from the Jesuits, “the roughness of the roads”, the “bad nature of the population”, the chaos in which documents had been found, and the misapplication of justice<sup>576</sup>.

With the death of D. José I, and the fall of the Marquis of Pombal, however, Sá Pereira’s position was no longer the same and soon he left Madeira, almost fleeing in secret, leaving the government to a triumvirate. Nonetheless, as it is not easy to keep a secret, on his departure, the people from Madeira did not forget to pompously light up the whole city and launch fireworks – a spectacle that, for lack of wind, the governor and his family had to watch on board, with the ship immobilized in the bay of Funchal.

## CONCLUSIONS

As we have written, it must be safeguarded that the conception and implementation of a reformist program such as the one the future Marquis of Pombal defined and carried out was a much more collective work than traditional historiography has propagated and that begins before the rise of Pombal, as we can see with the appointments of Count São Miguel and Manuel de Saldanha e Albuquerque, to which the future Marquis must have had little interference, also because the former was a Távora. Furthermore, this historiography has also disseminated a growing influence of the future Marquis on King D. José, which is unquestionable, but for the communion of both in the new forms of government of the so-called “enlightened despotism”.

The Ministers of the Kingdom fought for change in Madeira, as well as for the replacement of old practices by others more adjusted to the new times. All the obstacles to their action demonstrate that, as Foucault holds, “power is never located here or there, it is never in the hands of some, it is never appropriated as a good. Power works and is exercised in a network” (translated)<sup>577</sup>. This eternal circulation through the hands of several agents explains that, no matter how great the centralizing will of the king is, the local and

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<sup>575</sup> ABM, *idem*, fl. 94v.

<sup>576</sup> Rui Carita, *Op. Cit.*, 1996, pp. 180-185, *passim*.

<sup>577</sup> Michel Foucault, *A Microfísica do Poder*, 8.<sup>a</sup> ed., Terra & Paz, 2014, p. 162: <https://farofafilosofica.wordpress.com/2016/11/14/michel-foucault-26-livros-em-pdf-para-download-livros-ensaios-artigos-conferencias-e-cursos/> (consulted online on November 14, 2022).

regional contingencies, the different actors or the way in which jurisdictions are resolved do not allow the center's intentions to be fully fulfilled.

Finally, we must undo the myth of the "*Viradeira*", which has numerous limitations, with all the political protagonists of the following situation having been men, if not true "creatures of the Marquis", some of his closest collaborators. Moreover, the main legislation Pombal enacted did not fall. There was, effectively, an adjustment of power in the governing bodies and some occasional relaxation in certain situations, as the case of entrances to convents, for instance, but no setback. In fact, Pombal would be succeeded as the head of the royal cabinet by Aires de Sá e Melo (1715-1786), assistant secretary of State to the Marquis of Pombal and Secretary of State for Foreign Affairs and War, and also brother-in-law of governor Sá Pereira. Later, his son, João Rodrigues de Sá e Melo (1755-1809), first Viscount of Anadia and first Count, would be one of the key men in the government of the regent D. João VI (1767-1826), still maintaining a connection with his name in Funchal and with the first title of viscount.



# POMBAL AT PORTUGUESE PHILATELY: MARQUIS OF POMBAL ISSUE – 1925

JOÃO MANUEL LOPES SOEIRO<sup>578</sup>

## THE MAIN POST OFFICES (1520-1797)

The postal service in Portugal, as we know it (with dispatch and reception of correspondence), is created for the same reasons as it is in other places: due to the need to send messages.

Until the creation of the Main Post Office [in Portuguese, *Correio-Mor*], established in Évora on November 6, 1520 by King Manuel I, this service was carried out on foot or on horseback. Muleteers, therefore, were “graciously” obliged to carry the correspondence of the king and nobles at certain times of the year. The muleteers continued to carry letters until the 18<sup>th</sup> century. However, if they were caught, they paid a fine.

The postmaster general [in Portuguese, *Correio-Mor*] position included several obligations such as the obvious need to ensure all correspondence from public and private authorities and to reside in Lisbon. Therefore, the capital became the headquarters of the Post Office Administration.

By Royal Letter, D. Manuel I appointed Luís Homem as postmaster general of the kingdom. This character was a knight of the royal house and had been responsible for the correspondence of D. Manuel I, prior to his appointment to the position.

Luís Homem, both due to his merit and his role as the first postmaster general in Portugal, was responsible for the first great development of the postal service in our country.

At that time, the postage of correspondence was adjusted directly between the interested parties and the Main Post Office. Correspondence from abroad could not be delivered without the authorization or intervention of the postmaster general, who charged a fee for this service.

Between 1520 and 1797, there were several postmaster generals and many royal confirmations or ratifications. During this period there were nine of them, namely:

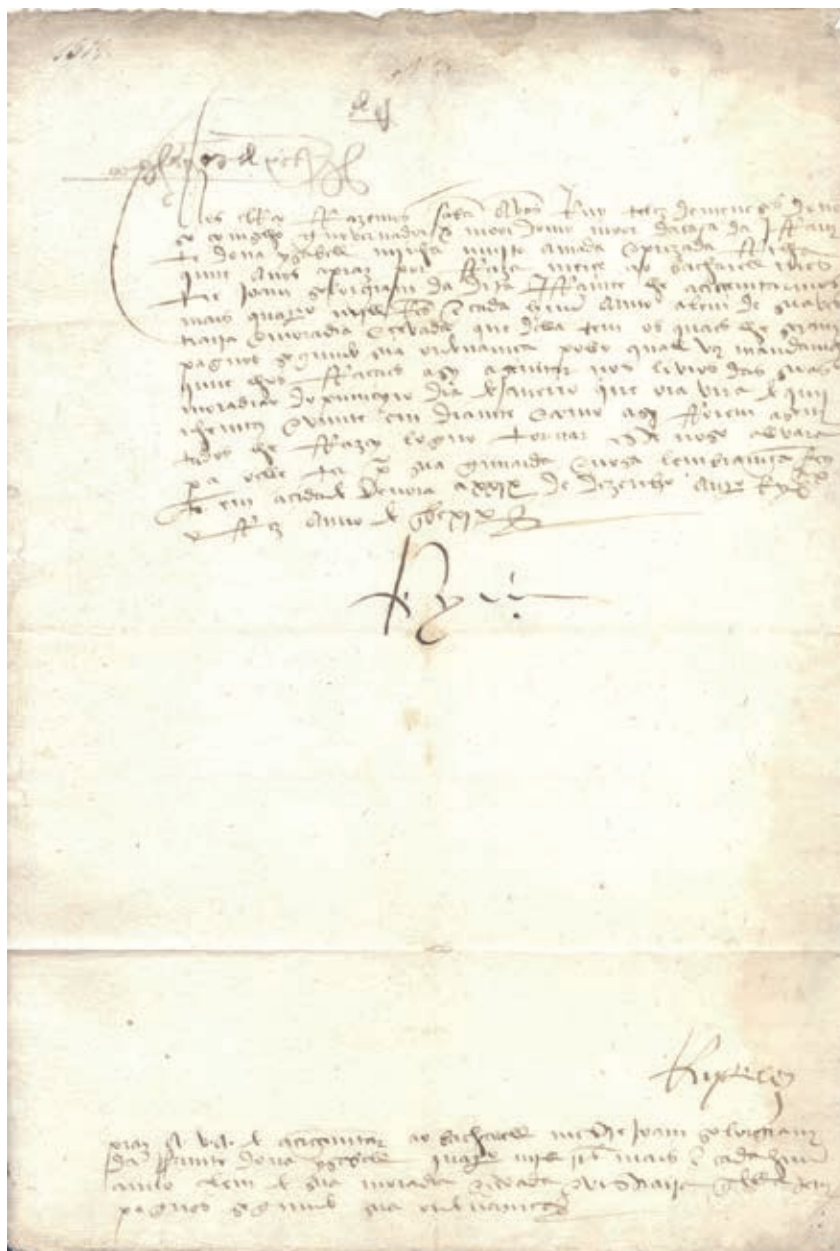
- Luís Homem, between 1520 and 1532;
- Luís Afonso, between 1532 and 1566;
- Francisco Coelho, between 1565 and 1577;
- Manuel Gouveia, between 1579 and 1598;
- Simão Luís and João Fernandes de Arões, between 1598 and 1606, on an interim basis due to the death of Manuel Gouveia;

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<sup>578</sup> Portuguese Federation of Philately, Portugal.

- Luís Gomes da Mata, between 1606 and 1607;
- António Gomes da Mata Coronel, between 1607 and 1641;
- Luís Gomes da Mata between, 1641 and 1674.

The postmaster general position passed from parents to children or direct family members with Francisco Coelho (3<sup>rd</sup> postmaster general). Under the rule of Filipe II of Portugal, the postmaster general craft was sold to the Mata family, of Spanish origin. In this context, the business is kept within the family through several generations until the extinction of this profession in 1797, by order of Queen D. Maria I.



Royal letter signed in Évora by King Manuel I, on December 29, 1519, establishing the salary of 4000 Réis [the local currency at the time] to Master João, surgeon of Infanta D. Isabel, daughter of King D. Manuel and later given in marriage to the Emperor Charles V (1500-1558). Luís Homem would be named the first postmaster general on November 6, 1520. Letter kindly provided by Drs. Luis and Eduardo Barreiros.

1540  
1540

Meus fmo sab, a des l<sup>ro</sup> de souza  
 meu apenodador meo e mpor de a  
 apenodador que eu no por em que  
 qn do qn que for dadas raso dapon  
 odador ao barance joam ff<sup>o</sup> meu so  
 loyiam mda rade d'era e na rade  
 de a enayca de sam d'era d'era mda  
 se em alosam d'ramas rom de d'ramas  
 fundam de pra o r pago ao dono das  
 ditas raso e q for dadas em  
 d'gao de d'ramas d'ramas d'ramas  
 de m d'ramas e f'z d'era a e b de  
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 e b de d'ramas e b de d'ramas

Luis

Luis de souza  
 Luis de souza

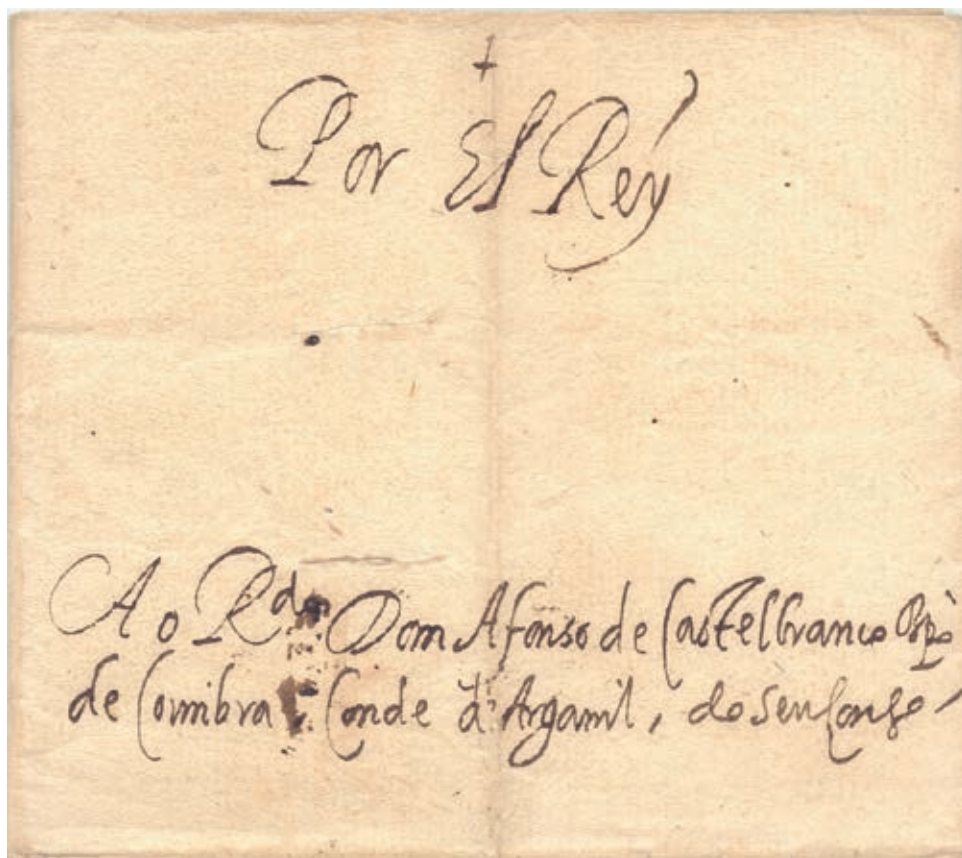
Luis de souza e b de d'ramas  
 Luis de souza e b de d'ramas

Luis de souza e b de d'ramas  
 Luis de souza e b de d'ramas

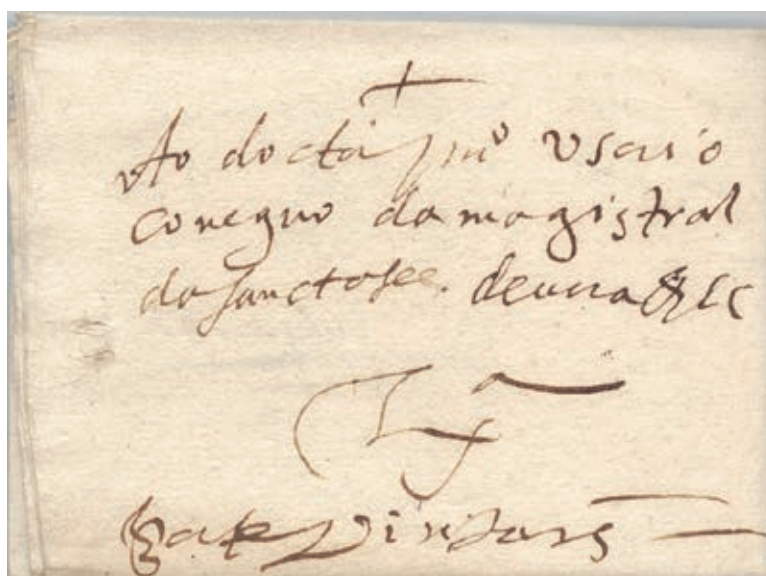
Royal letter signed in Lisbon by King João III on June 15, 1540 addressed to Lourenço de Sousa, establishing the salary compensation of João Fernandes, the royal surgeon. On this date, Luís Afonso was the second postmaster general (1532-1565). Document also provided by Drs. Luis and Eduardo Barreiros.



Royal letter signed in Lisbon by King D. Sebastião on June 8, 1574, addressed to Jerónimo Brandão, requesting the enlistment of his son in the military expedition to Tangier and informing the departure of the troops would on June 25, 1574. On this date, Francisco Coelho was the third postmaster general (1568-1577). D. Sebastião died in the Battle of Alcácer-Quibir in 1578, starting in 1580 the loss of independence to Spain. Letter provided by Drs. Luís and Eduardo Barreiros.



Letter from Filipe I of Portugal in 1598 to D. Afonso de Castel Branco, Bishop of Coimbra and Count of Arganil. On this date the fourth postmaster general was Manuel de Gouveia (1579-1598). Letter provided by Drs. Luis and Eduardo Barreiros.



*Letter from the 16<sup>th</sup> century sent from Lisbon on January 3, 1598 to Évora. Rare letter with the handwritten postage “Porte Vinte Réis” [Postage Twenty Réis]. On this date, Manuel de Gouveia was the fourth postmaster general (1579-1598). In this period, postage was only very rarely applied to cards. Letter also owned by Drs. Luis and Eduardo Barreiros.*

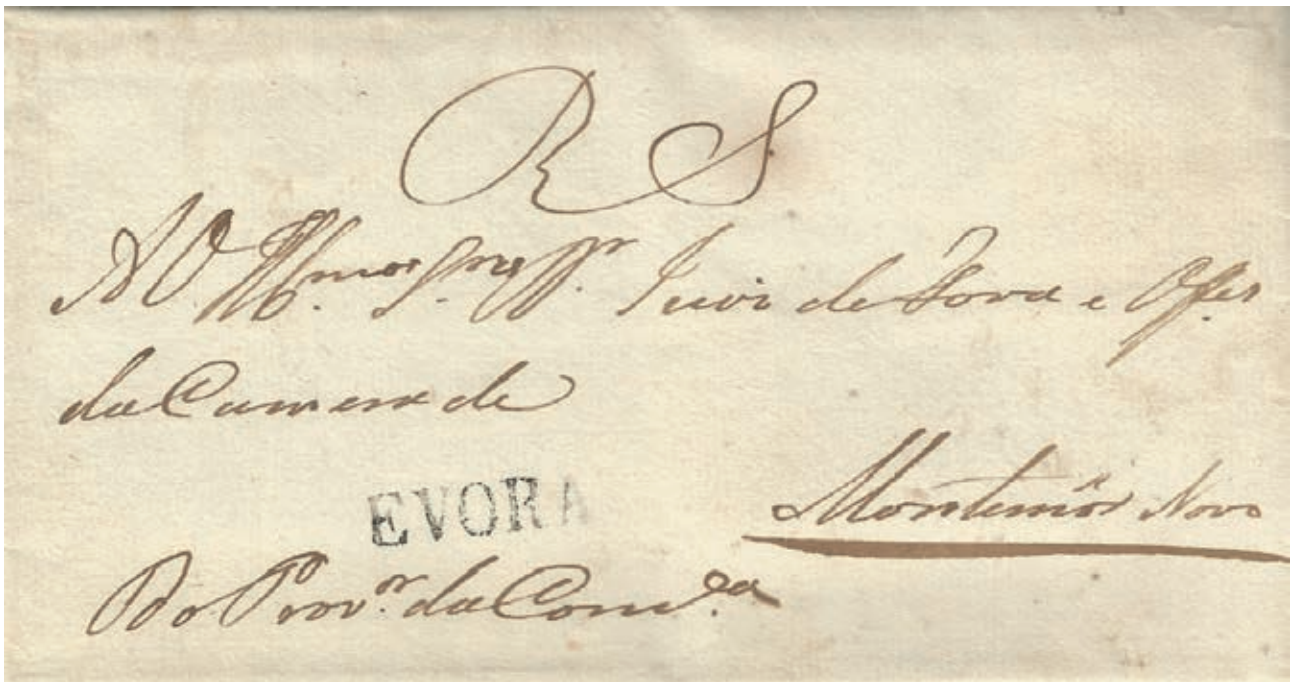
On January 18, 1797, through Decree, the Main Post Office service was extinguished, becoming a responsibility of the Portuguese crown. Henceforth, the post offices were integrated into the Secretariat for Foreign Affairs through a division. Its autonomy took place on April 19, 1799.

### **PRE-ADHESIVE PERIOD (1797-1853)**

This period, often referred to as Pre-Adhesive, encompasses the moment between the extinction of the postmaster general position and the appearance of the first stamps in Portugal on July 1, 1853.

In this space of time, the postal service undergoes major transformations and developments. They include: the creation of different postal marks (stamps) to the elaboration of tariffs; routes, departure, and arrival tables of correspondence; marking of letters with the due postage; road arrangements and routes; practical instructions for assistant couriers; creation of “carriers of letters” (postmen) position; placement of letter boxes in the main cities (mailboxes); and creation of a general regiment for the post office, in which all of the transformations were duly explained.

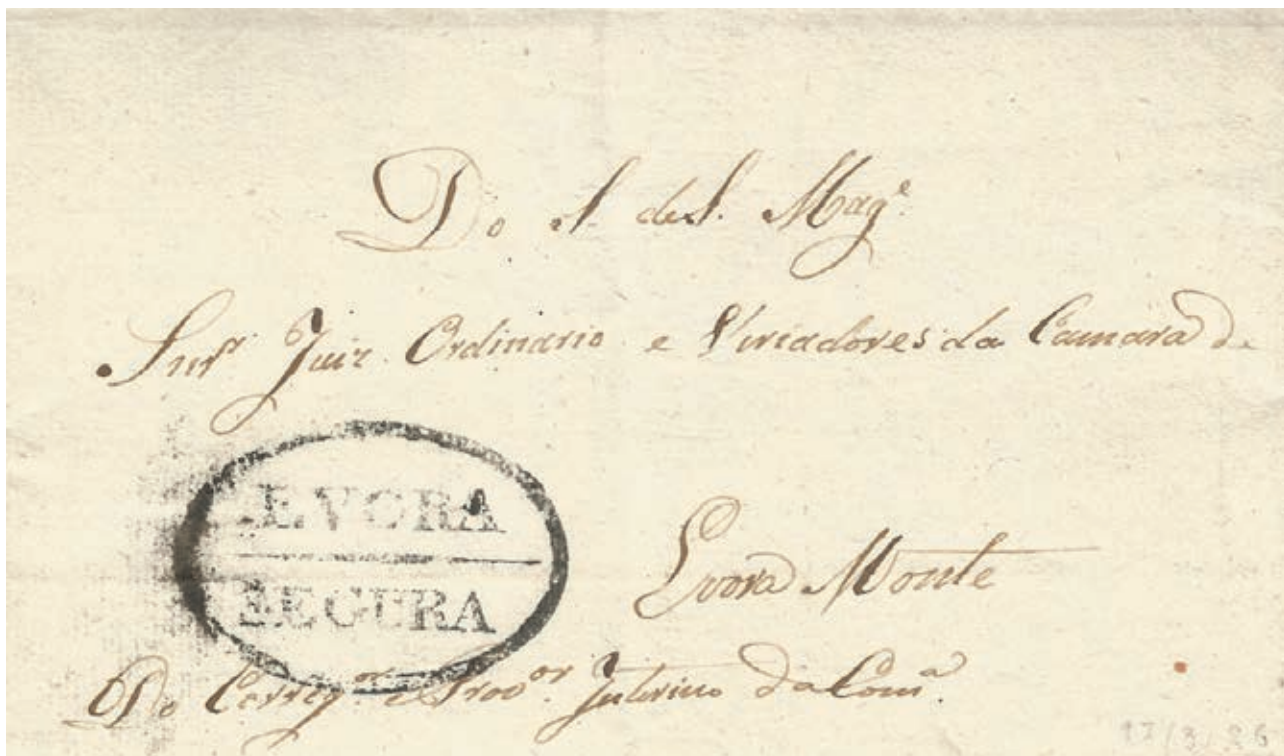
As an example, we will present some letters in which you can see some of these postal marks, all of which are from Évora (despite their applicability to other locations). Évora is closely linked to the creation of the post office and to the statesman Marquis of Pombal, given that his intervention and expulsion of the Jesuits led to the closing of the College of Espírito Santo (University of Évora).



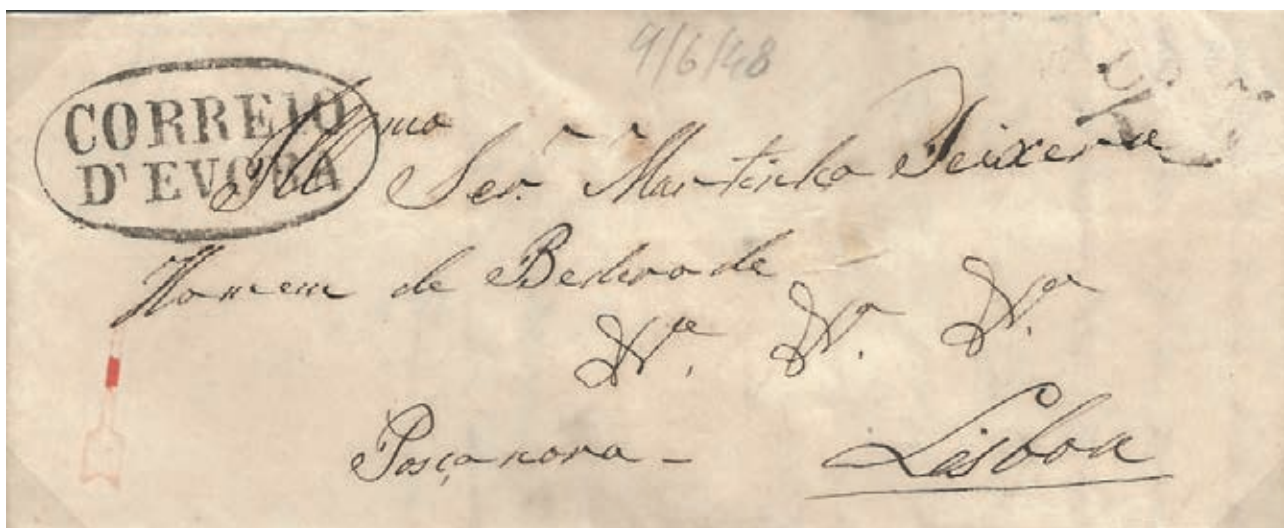
Letter of Royal Service (RS) from the Ombudsman of the District of Évora to the juiz de fora [a judge from outside of the city to impartially analyze matters, henceforth judge] and Officials of the District of Montemor-o-Novo, on January 3, 1820. Nominal starting mark EVORA, stamped in black.



Official letter from the Royal Service (SR), from the Corregedor [henceforth, Inspector-General or Magistrate] of the district of Évora to the judge, President, and Officers of the Village of Estremoz on March 15, 1826. Nominal mark of departure from Évora, within an elliptical border stamped in black. This mark can also be found in red.



Office of Her Majesty's Service, from the Interim Inspector-General of the District of Évora to the Ordinary Judge and Councilors of the District of Évora Monte on March 17, 1826. EVORA / SEGURA registration mark, within an elliptical border, stamped in black.



Private correspondence in a letter sent from Évora to Lisbon on June 4, 1848. Departure nominal mark CORREIO D'EVORA, within an elliptical border, stamped in black. This mark can also be found in blue.

## ADHESIVE PERIOD (1853 UNTIL OUR DAYS)

This period is characterized by the appearance of stamps, which had glue on the back and were intended to be placed on letters and other postal correspondence. Moreover, the three major postal reforms (1852/1853) mark this moment: those of 1869 and 1880, which completely revolutionized the postal service in Portugal.

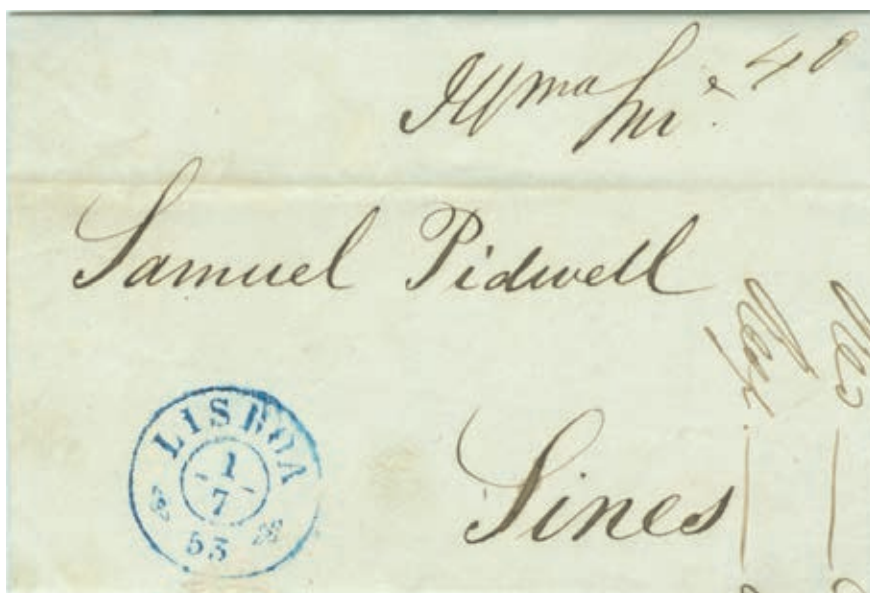
The genesis of the creation of postage stamps is closely linked to the English professor and reformer Sir Rowland Hill (3/12/1795 – 27/08/1879), to whom the invention of stamps is also credited. Sir Rowland Hill managed to promote a major reform on the English postal system, with the creation of the world's first postage stamp. This stamp, known as "Penny Black", began to circulate in England on the May 6, 1840, depicting a profile image of Queen Victoria.

This reform, which was introduced in the English postal service, aimed above all at lowering the exorbitant price of postage for letters and charging the sender with the payment; until that date, with few or rare exceptions, the addressee always paid for postage. The result of this paradigm shift was so evident and triumphant that, in a few years, the system was introduced in several postal administrations around the world. By 1860, 90 countries had fully adhered to this new reality. Sir Rowland Hill was undoubtedly responsible for the emergence of philately and philatelists.

In Portugal, the first stamps only came into circulation on July 1, 1853, because internal upheavals within the country delayed the implementation of the necessary postal reform in previous years.

The first stamps are those of D. Maria II, designed and engraved by Francisco Borja Freire, printed in relief at the *Casa da Moeda* [Mint]. They were printed on sheets of 4 X 6 stamps and were not perforated. On July 1, the values of 5 and 25 *réis* were circulated, increasing to 50 *réis* on July 21 and to 100 *réis* on July 2. They officially circulated until all fees were covered.





Letter of maximum rarity issued on July 1, 1853 from Lisbon to Sines (first day of official circulation of stamps in Portugal). Stamp dated from Lisbon, struck in blue with handwritten inscription of the postage of 40 réis in the upper right corner to be paid by the recipient. According to the law, letters could go unsealed. If they had the respective stamp, postage would be cheaper – 25 réis instead of the 40 réis paid at the destination. Letter kindly provided by Pedro Vaz Pereira.



Front of letter sent from Porto on December 21, which arrived in Lisbon on the 24<sup>th</sup> of the same month. Oval shipping stamp in blue from Porto and arrival mark also stamped in blue by the sea mail. Use of two stamps of D. Maria II, one worth 50 and the other of 100 réis, corresponding to the sixth internal postage for letters weighing between 1 ounce and 5 octaves and 1 ounce and 7 octaves, according to the postage table in force from July 1, 1853 to September 19, 1861. The seals are obliterated with the Porto bar stamp 52. This letter was probably circulated in 1853 or in 1854. An extremely rare letter, given that only four others are known to share this size combination. Piece kindly provided by João Maria Violante.



*Letter sent from Santo Tirso to Coimbra on March 3, 1855. Postage of 100 réis composed of four stamps of 25 réis of D. Maria II, obliterated with the bar stamp 74. Stamps pasted in the upper left corner in line with the law. Letter provided by Pedro Vaz Pereira.*

## STUDY OF THE MARQUIS OF POMBAL ISSUE

### Background of the Marquis of Pombal Issue

It was in 1855 that the councilor of the Lisbon City Council, Aires de Sá, presented the idea of building a monument to the Marquis of Pombal for the first time. In addition to this initiative, it was suggested that the Marquis of Pombal's remains should be transferred to Lisbon.

Some received this project well, but many opponents who disapproved the work of the statesman strongly rejected it. This opposition was so serious and effective that, for more than 25 years, nothing was done to support the idea of Aires de Sá.

In 1882, during the great student demonstrations in Lisbon, academics promoted the festivities of the Marquis of Pombal centenary, intending to promote the monument construction. They addressed the Government with the proposal that the first stone of the monument be laid during these commemorations. The City Councils gave their approval, and King D. Luís appointed the first Pro-Monument to the Marquis of Pombal Commission on 28 April. This group included the chair Rodrigues Sampaio, as well as 14 peers from the kingdom, 15 deputies, and 15 other high-ranking individuals.

On May 8, 1882, date of the First Death Centenary of the Marquis of Pombal, the king casts the first stone of the monument in the Rotunda, in the presence of the Government and Diplomatic Corps.

More than twenty years passed without any development in the construction of the monument. However, the Great Commission was reorganized in March 1905; this time presided over by António de Azevedo Castelo Branco. An Executive Committee was created, under Veiga Beirão's leadership.

The preparatory work finally started with the opening of a public subscription, including the names of King D. Carlos, in addition to Queens D. Amélia and D. Maria Pia at the top of the list, each contributing with 250\$000 *réis*, followed by Infante D. Afonso with 100\$000 *réis*. It was also decreed the collection (currency) of 200 silver *contos* in 5-pence coins. All together it yielded about 117 *contos*, which were more than enough for the construction of the monument at the time.

Due especially to political struggles, the project was completely interrupted. Only after the proclamation of the Republic the matter returned to the order of the day. Magalhães Lima managed to get the Provisional Government to order a public tender for the presentation of models of the monument in 1911.

After some time, the first prize was approved for a project by the sculptor Francisco Santos and the architects António Couto and Adães Bermudes, with the motto "*Gloria progressus*". Nonetheless, there were several complaints against the constitution of the jury, which caused several new competitions in succession. Despite that, the project initially approved won all subsequent contests.

The outbreak of the First World War and its political and economic consequences in our country prevented the beginning of the construction of the monument again. Only in 1923, the project was resumed with positive results.

The Commission, under the leadership of General Vieira da Rocha, thought that the creation of Postal Tax stamps could generate the necessary funding to pay for the construction of the monument. This Masonry duly framed this idea, which had great influence in all areas of national life. Given that, on July 30, 1924, the Minister of Commerce, Colonel Henrique Sátiro Pires Monteiro, sent to the Chamber of Deputies a bill that created two postage stamps with fees of \$15 and \$30, the latter with a "Fine" surcharge. The proceeds from the sale of these stamps would be used to the subscription promoted by the Executive Committee of the monument to the Marquis of Pombal.

On August 1, the proposal was accepted and sent to the Postal and Telegraph Commission, which approved it on the 4<sup>th</sup> of the same month. From there, it proceeded to new approvals by the commissions of the Colonies on August 7 and of Finances on the 12<sup>th</sup>. In a session of the Chamber of Deputies on August 21, Bill No. 804 – C was discussed, with the following text:

**Article 1** – Two postage stamps are created, one with a value of \$15 and another with a value of \$30, the latter having a “Fine” surcharge, the proceeds of which will revert to the national subscription promoted by the Executive Committee of the Monument to the Marquis of Pombal.

**Article 2** – The issue of these stamps will not exceed a total of 20,000,000, distributed as follows: 3,300,000 to be affixed to correspondence exchanged within the mainland and sent from there to the adjacent islands and overseas provinces; 1,650,000 to be affixed to correspondence exchanged within each archipelago of the Azores and Madeira and to those sent from each of these to the Mainland and to the other archipelago and overseas provinces; 1,750,000 to be placed on correspondence exchanged within each of the provinces of Angola and Mozambique and on those dispatched from each of these to the Metropolis, to the other Portuguese colonies and to the Adjacent Islands; 1,650,000 to be placed on correspondence exchanged within each of the colonies of Cape Verde, São Tomé and Príncipe, Guinea, India, Macau, and Timor, as well as on those dispatched from each of these to the Metropolis, Angola, Mozambique, and Adjacent Islands.

§ 1 – The Ministry of Commerce and Communications along with that of the Colonies will determine the colors, designs, and other features of the seals.

§ 2 – The special postage with the \$15 stamp will be mandatory as a surcharge on postal and telegraphic correspondence and on postal parcels from May 8 to 13, 1925.

§ 3 – Correspondence and postal parcels removed from the receptacles in the first print run on May 8, 1925 are subject to the additional postage referred to in the previous §, and those withdrawn in the first print run on the 14<sup>th</sup> of the same month are exempt from it.

§ 4 – The following will be exempted from the requirement of this additional stamp: newspapers, printed books, and correspondence officially exempt from postage.

§ 5 – Unfranchised correspondence with the \$15 special stamp as a surcharge, from May 8 to 13, 1925, will be carried with the \$30 special fine stamp, amount which will be charged to the recipients.

§ 6 – In the stamps destined for India, Macau, and Timor, the rates established in article 1 will be replaced by their equivalents in the currencies adopted in these colonies.

**Article 3** – The Ministries of Commerce and Communications will define the amount of \$30 fine stamps to be issued both to the Metropolis and Adjacent Islands, as well as to the colonies. The total number of stamps issued cannot exceed the limits set in article 2.

**Article 4** – The stamps withdrawn from circulation for exceeding the requirements set out in §§ 2 and 5 of article 2 will be sent to the *Casa da Moeda e Valores Selados*, where they will be for sale until requested by the Executive Committee of the Monument to the Marquis of Pombal or until they are sold out. The sale proceeds have the destination set out in article 1, being delivered to the same Commission.

**Article 5** – All expenses with the issue are exclusively under the responsibility of the Executive Committee of the Monument to the Marquis of Pombal.

**Article 6** – The Ministry of Commerce and Communications along with that of the Colonies will adopt the necessary measures for the execution of this law.

**Article 7** – Legislation to the contrary is revoked.

Hall of Sessions, July 28, 1924

The Minister of Commerce and Communications,  
Henrique Sátiro Lopes Pires Monteiro

Deputies Viriato da Fonseca and Carvalho e Silva intervened, speaking out against the proposal and demanding its withdrawal. On the other hand, deputy Jaime de Sousa intervened in favor. As a result of this situation, the Chamber of Deputies voted and approved the withdrawal of the discussion.

However, on November 19, the same deputy who opposed the initial proposal now asks for reconsideration with the utmost urgency. After several interventions and discussion, the proposition was approved in general and then in specific, with only three votes against it. Consequently, it was converted into the Law No. 1708 of December 24, 1924 (Government Gazette No. 285, 1 ed., of the same date).

### **The execution of the Marquis of Pombal Issue**

On February 14, 1925, Ordinance n. 4532 (Government Gazette No. 37, 1 ed., 17<sup>th</sup> of the same month) regulated the provisions of the law, determining the following:

- The colors of the stamps – blue for the Mainland;
- The respective drawings – three for each fee; effigy of the Marquis of Pombal; Lisbon Reconstruction Plan (by Miguel Ângelo Lupi) and photograph of the model of the monument to be built; with the application of any of these reasons in the correspondence defined as optional;
- Sales to collectors.

Nonetheless, the Commission had already contacted the Waterlow & Sons Ltd. from London through the General Administration of Posts and Telegraphs. The first company was represented in Lisbon by the Walker Brothers & Comp., located at *Travessa do Cotovelo* no. 37 – 1<sup>st</sup>. Negotiations were fruitful, and a contract was signed (\*) with the Waterlow printing house on December 30, which committed to the following:

**1 and 2** – Provide 20 000 000 stamps distributed in three designs, as described below:

- 6 676 000 – Effigy of the Marquis of Pombal;
- 6 662 000 – Lisbon Reconstruction Plan;
- 6 662 000 – Monument to be built.

3 – Provide the seals according to this distribution:

<b>Destination of use</b>	<b>Design</b>	<b>\$15 fee</b>	<b>\$30 fee</b>
Mainland	Effigy	900 000	200 000
Mainland	Plan	900 000	200 000
Mainland	Monument	900 000	200 000
Azores	Effigy	434 000	117 000
Azores	Plan	433 000	116 500
Azores	Monument	433 000	116 500
Madeira	Effigy	434 000	117 000
Madeira	Plan	433 000	116 500
Madeira	Monument	433 000	116 500
Cape Verde	Effigy	434 000	117 000
Cape Verde	Plan	433 000	116 500
Cape Verde	Monument	433 000	116 500
Guinea	Effigy	434 000	117 000
Guinea	Plan	433 000	116 500
Guinea	Monument	433 000	116 500
São Tomé and Príncipe	Effigy	434 000	117 000
São Tomé and Príncipe	Plan	433 000	116 500
São Tomé and Príncipe	Monument	433 000	116 500
Angola	Effigy	468 000	117 000
Angola	Plan	466 000	116 500
Angola	Monument	466 000	116 500
Mozambique	Effigy	468 000	117 000
Mozambique	Plan	466 000	116 500
Mozambique	Monument	466 000	116 500
India	Effigy	434 000	117 000
India	Plan	433 000	116 500
India	Monument	433 000	116 500

Destination of use	Design	\$15 fee	\$30 fee
Macau	Effigy	434 000	117 000
Macau	Plan	433 000	116 500
Macau	Monument	433 000	116 500
Timor	Effigy	434 000	117 000
Timor	Plan	433 000	116 500
Timor	Monument	433 000	116 500

4 – In addition to these quantities, supplying another 410 complete collections to the U.P.U. Secretariat (Universal Postal Union), located in Bern;

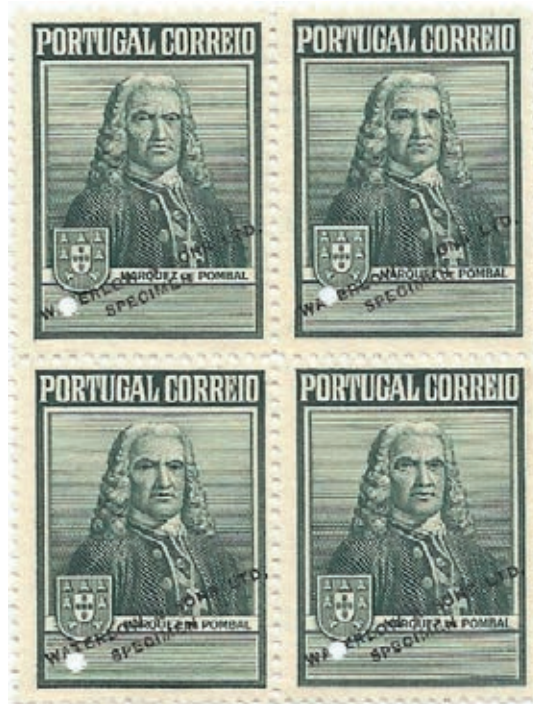
5 – Delivering the stamps by March 31, 1925, at your own expense;

6 – Providing the stamps, for the total price of £5580;

7 – Rendering the plates unusable in the presence of a Portuguese representative after the delivery of all the stamps.

(\*) – *The original contract was in the archives of the C.T.T. (Post of Portugal)*

The Commission sent the photographs to London with the reasons for each stamp: the effigy of the Marquis of Pombal according to one of the many existing engravings; the Lisbon Reconstruction Plan based on Miguel Ângelo Lupi's painting that was in the Lisbon City Hall; and the approved model for the monument, seen from the southeast angle. H. Fleury developed the drawings. In turn, the intaglio engravings were the responsibility of J. A. C. Harrison (Effigy and Plan) and G. Fairweather (Monument).



*Three drafts on quatrains, with the Effigy of the Marquis of Pombal, Lisbon Reconstruction Plan, and Monument. Only the blue color has been approved for use in the Mainland. Diagonal inscription on each stamp "Waterlow & Sons Ltd. / Specimen. Small security hole in the lower left corner of each seal.*

The stamps were printed on sheets of 100 units (10 X 10), with a perforation of 12 ½. The caption, fees, and surcharge "Fine" for porting stamps were black on a second printing. The three designs were the same for the Mainland, Adjacent Islands, and Overseas Provinces.



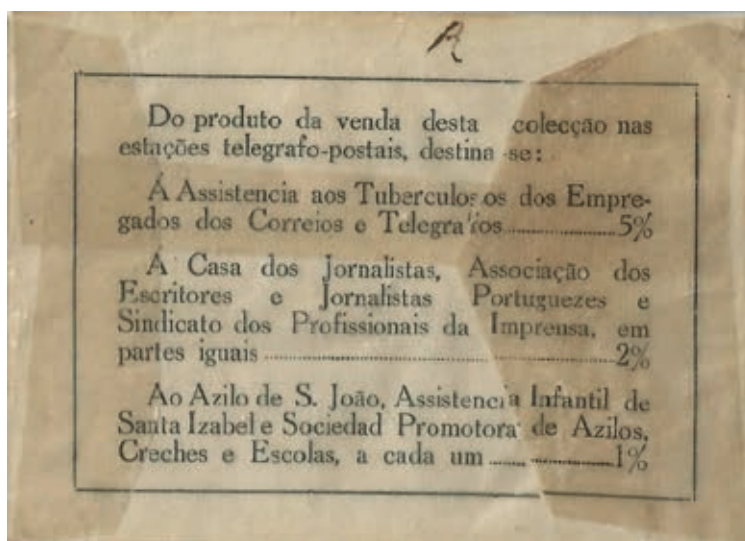
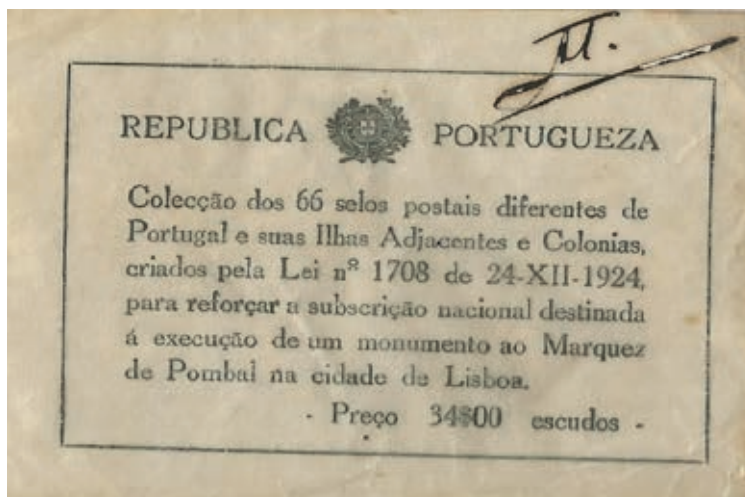


*Quatrains of the definitive seals for the Mainland, on leaf edge numbered in the upper right corner, (441 – Effigy of the Marquis of Pombal, 48 – Lisbon Reconstruction Plan, and 451 – Monument to the Marquis of Pombal, respectively), where one can already observe the printing of fees of 15 C and the caption “MAINLAND”.*

In March 1925, the first stamps left London in several shipments, and their delivery continued in the months of April, May, June, and July. Ships were used to transport the stamps, namely: S.S. Avon, S.S. Condor, S.S. Almanzora, S.S. Andes, S.S. Arlanza, and S.S. Alondra.

Ordinance 4532 determined that, after the period of postal sale in all stations, stamps continued to be sold for another four days, at face value and for philatelic purposes. At the end of this time, they would all be returned to the Mint, where they would continue to be sold at face value, until the stamps were completely sold out. However, “for the convenience of the public and simplification of the service”, complete collections from the Mainland, Islands, and Overseas would be sold for the price of 34\$00.

This situation results in enormous dissatisfaction among the general public, as the face value of the complete collections (66 stamps) was 17\$05. Given the circumstances of the nearly 100% increase, very few collections were sold at C.T.T. On the other hand, requests to the Mint increased, coming from all over the country. To try to stop this process, the Commission decided to set the price for the complete collections without an envelope at 33\$00 and 34\$00 with it. They also decided to increase the value of single stamps by \$50. The disrespect for the approved law (ordinance 4352) was all too evident, but neither the Commission nor the State understood it as such.



*Envelope bags (front and back) where the complete collections with the 66 stamps of the Marquis of Pombal issue were sold.*

Subsequently, the Waterlow printing house received further instructions to supply another 100,000 collections, half of which were sent to post offices in envelopes. The other half was delivered to the Mint under the orders of the Commission.

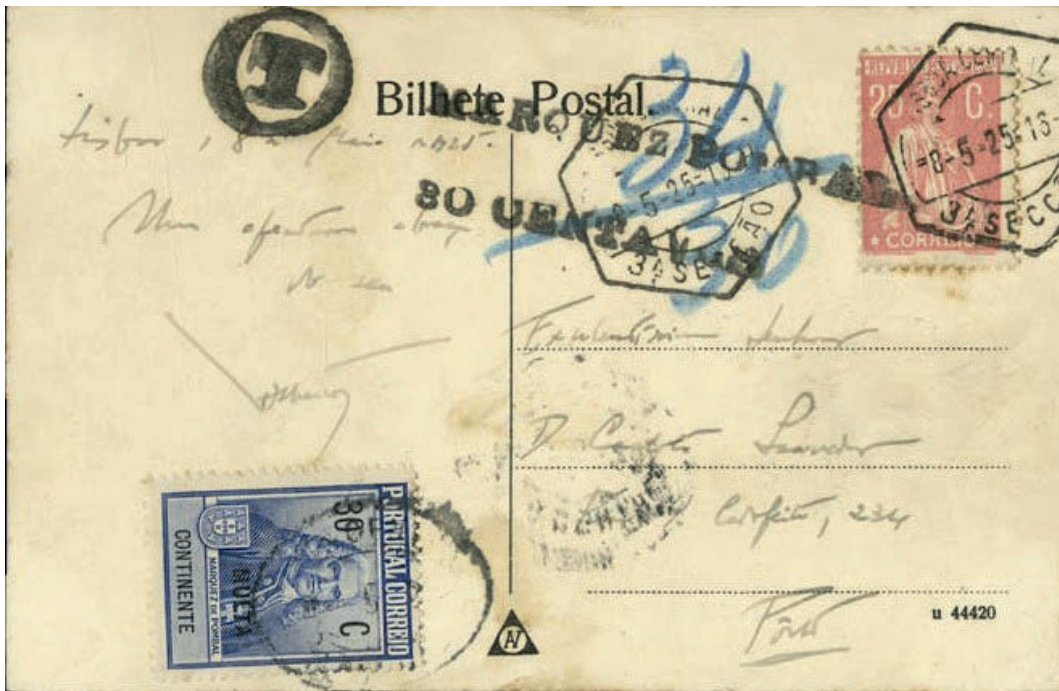
On top of it, the discontent of the philatelic public was felt quite convincingly. The complaints had to do with the many defective stamps, due to the poor quality of the paper, with defects in the perforations and the separation of the stamps. Many of them were sold torn and missing teeth. There were so many protests that the Commission decided to replace the damaged seals with new ones. At one point, they even decided to withdraw the collections in envelopes from sale and burn them in their entirety. It is hard to believe that all the seals on all the envelopes were damaged, but the Commission asked the Government for authorization to request the manufacture of the number of seals that were to be burned. The Decree No. 14036, of July 28, 1927 (Government Gazette No. 165, 1 ed. of August 3), authorized the burning of 41,917 collections, a number later rectified to 43,962 through the Decree No. 14 966 of November 24 (Government Gazette n° 246, 1 ed. of the 29<sup>th</sup>). Additionally, it established the manufacture of another 4,149,783 stamps, a number also rectified to 4,352,238 stamps of \$15 from the Mainland, to compensate for the number of stamps destroyed and the possible loss of revenue by the Commission.

On August 8, 1927, the stamps were burned at the Mint. On March 19 of the following year, the \$15 stamps from Mainland arrived from London via the ship S.S. Alondra, all with the Effigy of the Marquis of Pombal.

### Use of Marquis of Pombal stamps from May 8 to 13, 1925



Entire 25-cent postcard “Ceres” [series of stamps depicting the Roman goddess Ceres], circulated from Figueira da Foz to Lisbon. Correct use of the \$15 stamp – Monument to the Marquis of Pombal, on the first day of mandatory use of the additional tax allowance.



Postal note issued from Lisbon on May 8, 1925 without additional tax relief stamp. It presents a linear mark in two lines, stamped in black “MARQUEZ POMBAL / 30 CENTAVOS” [Marquis of Pombal / 30 cents]. It also features the T for porteado [used in unsealed correspondence, that is, those no paid for by the sender, henceforth unpaid mark] in a circle and the inscription in blue pencil of the value to be paid. A special stamp of \$30 “Fine” with the Effigy of the Marquis of Pombal was applied at the arrival station. Highly rare piece.



Entire Ceres postcard, circulated from Famalicão to Lisbon on **May 7, 1925**, according to the date obliterating the stamp printed on the postcard. T-mark of fine and postage with the \$30 stamp “Fine” – Effigy of the Marquis of Pombal at the receiving station, due to the lack of the mandatory tax stamp. On the day the postcard was issued, the tax was not in effect. **Only known piece.**



Entire postcard sent from Lisbon to Germany on May 12, 1925. One can see the excess postage in relation to the required amount for postcards to foreign countries (it was 96 cents, in force since January 1, 1925, by newsletter No. 53 of December 28, 1924). Misapplication of the \$15 tax stamp – Lisbon Reconstruction Plan, because, despite being within the mandatory period of the additional tax deductible, it was not applied in correspondence to foreign countries.



Entire postcard sent from S. Martinho to Porto on May 13, 1925, on the last day of the mandatory application of the stamp of additional postage of \$15 tax. \$15 Stamp – Lisbon Reconstruction Plan. Stamp date block with error (05 instead of 1925).



Entire postcard circulated on May 13, 1925, from Castelo Branco to Porto. As it was shipped without additional tax allowance, it was marked as unpaid at the arrival station, with the application of the \$30 “Fine” – Monument to the Marquis of Pombal stamp. Unpaid T mark inside circle.



Entire postcard circulated from Viseu to Porto on May 13, 1925. It was sent without the mandatory additional tax allowance of \$15, so it was carried with the stamp of \$40 “Fine” – Effigy of Marquis of Pombal, at the arrival station.

When the official period for the application of the Marquis of Pombal tax stamps ended, on May 14, 1925, they no longer had any circulation validity. Therefore, several million stamps were returned to the Mint, both from the Mainland and the Adjacent Islands and from the Overseas Colonies.



Registered letter from Cumbana on **October 14, 1925** to Lisbon, where it arrived on November 14. Traffic mark from Lourenço Marques dated October 18. Correct postage of 1\$20 for the payment of the simple postage of the letters to Mainland (\$80) and the registration fee (\$40). Misapplication of the \$15 stamp tax – Monument to the Marquis of Pombal.



Letter sent from Lubango to Switzerland on **November 21, 1925**, which arrived on December 15. As one can see, and considering the claims of the previous paragraph, the seals of the Marquis of Pombal were inadvertently circulated, without any legal value – as per the approved law. Use of three stamps from Angola, - 2 of each were \$15 Effigy of the Marquis of Pombal and Lisbon Reconstruction Plan, as well as a special \$30 “Fine” from the Lisbon Reconstruction Plan. In addition to this misuse, tax stamps had no legal basis for correspondence abroad.

The quantities that remained were enormous and would hardly be consumed by the philatelic public in decades. Let us remember that there were still stamps for sale from the Marquis of Pombal Issues in the mid-50s.

Given this scenario, the Commission requested a new period of mandatory use of the Marquis of Pombal stamps, as an additional tax seal. The law no. 1862 of April 19, 1926 (Government Gazette no. 83, 1 ed. of the same date) decreed the mandatory application of the seals of the Marquis of Pombal on the Continent, Adjacent Islands, and Overseas Colonies from May 5 through 15 of each year, beginning in 1926, until the issue was sold out. The same law authorized the use of stamps from the Azores and Madeira, as well as from overseas provinces to circulate on the Mainland. According to A. H. de Oliveira Marques, in his book *História do Selo Postal Português* [History of the Portuguese Postage Stamp], this did not happen<sup>579</sup>. In other words, the circulation of stamps from the Colonies and Adjacent Islands did not occur on the Mainland, with the exception of exclusively philatelic letters. However, this is not entirely true, and several proofs of it will be shared in this text. Stamps from the Colonies and Adjacent Islands circulated freely in correct applications in the second official period of the application of the postal tax in the Metropolis.

Therefore, from May 5 to 15, 1926, 1927, 1928, and 1929, the stamps from the Marquis of Pombal issue were obligatorily circulated in all correspondence of the internal, insular, and overseas service, similarly to what happened in 1925.

The Decree No. 17,664 of November 25, 1929 (Government Gazette No. 271, 1 ed. of the same date) suppressed the authorizations for the circulation of stamps for additional use, as well as any other commemorative or assistance stamps; ending, ergo, the use of postage stamps from the Marquis of Pombal issue. It also ordered the immediate delivery of all stamps existing in the Mint to the General Administration of Posts and Telegraphs.

However, since March 26 of that year, the Commission, in response to the many protests of the philatelists, had ordered the Mint to sell the single stamps or collections at face value. Evidence shows, nonetheless, that the complete series of the 66 stamps started to be acquired for 14\$85, instead of the real face value of 17\$05. The Mint did not take into account the real equivalents of the values of the Indian, Macau, and Timor currencies, and fixed the values of the eastern provinces at \$15 and \$30 respectively. In February of the following year, the Mint delivered the stamp stock to the Post Office, in line with the Decree 17 664.

In the year 1930, in April, under the terms of the Decree no. 18 178 (Government Diary no. 81, 1 ed. of April 8), the sale for philatelic purposes started to be made only at the Post Office counters, with the product being handed over to the Commission. This new period of sale was supposed to last just three months, but ended up being prolonged until the issue was sold out.

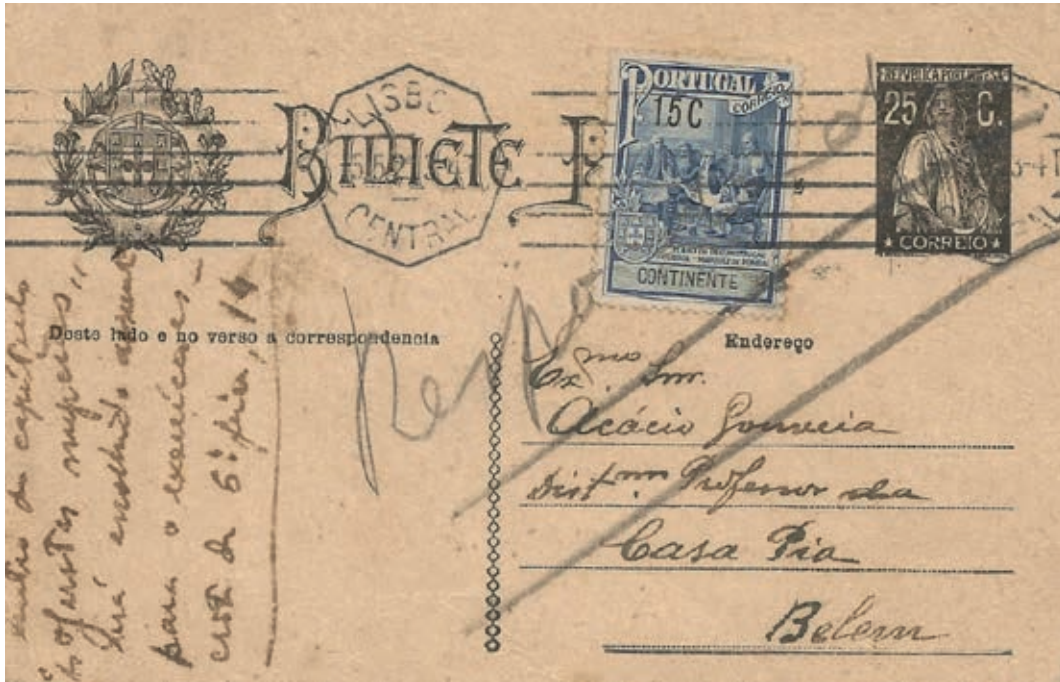
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<sup>579</sup> A. H. de Oliveira Marques, *História do Selo Postal Português*, Lisbon, Planeta Editora Lda., 1995.



**Second period of mandatory postal tax (May 5 to 15, 1926 to 1929)**

As previously mentioned, this section displays some pieces from this period of four years of circulation duly commented. The order of presentation is not defined geographically or by any other criterion other than the chronological thread in reference to the date of circulation.



*Entire postcard circulated internally in Lisbon on May 5, 1926, on the first tax day of the second mandatory period. Application of the \$15 stamp – Lisbon Mainland Reconstruction Plan.*



*Letter sent from Setúbal to Lisbon on May 8, 1926. It was dispatched without the additional \$15 tax deductible. Fined at the arrival station with the application of the special seal of 4 Avos [local currency] of Macau “Fine” – Lisbon Reconstruction Plan.*



*Pair of \$15 stamps – Effigy of the Marquis of Pombal from Guinea, obliterated on May 10, 1926 at Porto Central station / First Section with the “PORTEADO” [unpaid] mark in black on the stamps. This is the use of two normal \$15 tax stamps to make up the value of the special \$30 “Fine” stamp.*



*Letter sent from Fafe to Porto on **May 10, 1926**. It followed without an additional \$15 mandatory tax, in addition to being posted at the arrival station with a pair of \$15 stamps – Lisbon Reconstruction Plan, from São Tomé and Príncipe. There is a black mark on them: “PORTEADO”. **One of the three known cards.***



Illustrated postcard sent from Faro to Lisbon on May 12, 1926. Correct application of the \$15 obligatory tax stamp – Lisbon Reconstruction Plan, but which lacked 10 cents in the simple postage of postcards in the internal service, which was \$25, in force since February 11, 1924, as per the Decree No. 9424 of the same date. Marked with a blue pencil “20 C”, unpaid with the stamp of this value of Regular Issue – 1904 type, (double the postage value missing) and obliterated with the stamp of the First Section Lisbon Central on May 14, 1926. **Only known piece unpaid in the tax period (unpaid + tax).**



Postcard sent from Funchal to Beira (Mozambique) on May 13, 1926. Correct postage of postcards to the colonies and application of the \$15 stamp of mandatory tax – Monument to the Marquis of Pombal of Madeira. It arrived in Beira on June 5. **Only known piece.**



Letter sent from Lisbon to Santo Tirso on May 14, 1926. Use of the Macau 2 Avos tax stamp with the Effigy of the Marquis of Pombal.



Letter circulated from Lisbon to Santarém on May 15, 1926, on the last day of this year's tax application. Correct use of the \$15 stamp – Monument to the Marquis of Pombal from Guinea. BNU (National Overseas Bank) perforated seals.



Postal note sent from Timor to Coimbra on **September 6, 1926**. Misuse of the 2 Avos tax stamp – Lisbon Reconstruction Plan. Dili transit and Coimbra arrival mark on November 3. **The only known piece with this provenance and destination using the tax stamp.**



25-cent postage “Ceres”, with additional stamps to make the correct postage of \$48 for the postcards to the colonies, as per Circular No 53 of December 28, 1923. Postal note sent from Lisbon on May 5, 1927 to Cape Verde (mark indicating May 22 arrival at Praya). As it was in the mandatory tax period, the additional stamp of \$15 was also applied – Monument to the Marquis of Pombal. **Only known piece.**



Entire 25-cent postcard “Ceres”, sent from Melgaço on May 6, 1927 to Porto. Correct application of the \$20 cent stamp – Monument to the Marquis of Pombal from Azores – as a tax stamp.



Postal note sent from Lagos to Setúbal on May 7, 1927. Correct application of the \$15 tax stamp – Lisbon Reconstruction Plan from Guinea. Conduction by South Ambulance II.



Letter sent from Fornos de Algodres on **May 8, 1927** (error in the date stamp, 07 instead of 1927). As normal \$15 tax stamps should not be available at this station, a special stamp of \$30 "Fine", bisected – Lisbon Reconstruction Plan, was applied to enforce the mandatory application of the tax amount.



Internal circulation in Porto on May 9, 1927. As it was sent without additional tax deductible, it was fined with the application of the special stamp of \$30 "Fine" - Lisbon Reconstruction Plan for the province of São Tomé e Príncipe.



*Entire postcard circulated from Porto to Vila Flor on May 9, 1927. Correct application of the additional tax of \$15 – Effigy of the Marquis of Pombal for our colony of Guinea.*



*A very rare letter circulated from Novo Redondo to Inhambane on May 11, 1927, transiting through Lobito and Lourenço Marques. Correct use of the \$15 tax stamp – Monument to the Marquis of Pombal. Correct postage of 50 cents for letters in the domestic and overseas service, since January 11, 1923 (Government Gazette No. 7, Decree No. 8 576 of the same date). **One of the few known pieces that fully complies with the Marquis of Pombal tax rules in the overseas service.***





Entire 25-cent postcard “Júlio Alves” type, sent to Porto on May 5, 1928. It transited without the mandatory \$15 tax deductible, for which it was fined at the arrival station, with the application of the special stamp of \$30 “Fine” – Monument to the Marquis of Pombal from Madeira.



Entire postcard sent from Carrazeda de Anciães to Porto on May 11, 1928. Correct application of the \$15 tax stamp – Monument to the Marquis of Pombal in the province of Cape Verde.



Postal note issued on May 13, 1928, from Lamarosa to Santarém. Correct application of the mandatory tax seal, with the application of the 6-rupee stamp from our colony in India – Lisbon Reconstruction Plan.



Entire postcard sent from Castelo de Vide to Peniche on **May 15, 1928**. As the dispatching station had no \$15 tax stamps, the special \$30 "Fine" – Lisbon Reconstruction Plan for the province of Cape Verde – was used, to comply with the mandatory tax.



Entire postcard sent from Porto to Vila Nova de Gaia on May 15, 1928. Application of the \$15 tax stamp – Monument to the Marquis of Pombal from the province of Mozambique.



Entire postcard of \$25 cents “Ceres”, sent from Vila Fernando (a village in the municipality of Elvas) to Vieira do Minho on **May 15, 1928**. There were no Marquis of Pombal stamps at this station. To make sure the correspondence was sent, so as not harm the receiver, one can read the manual inscription: “No need for the ‘Marquis of Pombal’ seal”, as such seals were unavailable for sale at this Station / O.E.E. / Leonel Belo Hermida. The postcard arrived at its destination and was not fined. **Only known specimen.**





Declared value shipped from Lisbon to Lourenço Marques on May 7, 1929. Correct postage of 2\$95 for payment of the first and second postage of letters to the colonies (\$80 + \$40), of the registration prize of the declared value up to 600\$00 (1 \$60), and the correct application of the supplementary tax deductible of \$15 – Effigy of the Marquis of Pombal. **Only known letter.**



Entire postcard sent from Guarda to Porto on May 8, 1929. It continued without additional tax fee and, therefore, was marked as unpaid at the arrival station with the application of the special 4 Avos "Fine" stamp – Lisbon Reconstruction Plan of the province of Timor.



Letter sent from Tete to Santarém on May 8, 1929, fulfilling all the requirements of the Marquis of Pombal postal tax. **Very rare letter.**



Entire postcard sent from Estarreja to Porto on May 8, 1929. It continued without mandatory tax fee and was fined at the arrival station with the application of a \$30 stamp "Fine" of Angola – Effigy of the Marquis of Pombal. Conduction by ambulance Norte Mixto III.



Entire 25-cent postage “Ceres”, Júlio Alves type, sent from Valinha to Porto on May 8, 1929. It continued without the mandatory tax fee and, therefore, was marked as unpaid at the arrival station with the application of the \$40 stamp fine of the Azores – Monument to the Marquis of Pombal.



Entire postcard circulated to Porto on May 8, 1929. As it was sent without tax fee payment, it was fined at the arrival station with the application of a \$30 stamp “Fine” of Angola – Monument to the Marquis of Pombal.



Letter sent from Novo Redondo to Santarém on May 9, 1929. It arrived on the mainland on June 8. Postage and correct application of the additional \$15 tax stamp – Monument to the Marquis of Pombal. **Rare copy of compliance with tax rules in the overseas service.**



Entire postcard sent from Vila Fernando to Porto on May 10, 1929. It continued without the mandatory tax fee payment and was, therefore, marked as unpaid at the arrival station, with the application of the 4 Avos de Fine - Effigy of the Marquis of Pombal of the province of Macau. Conduction by ambulance Beira Alta II.





Registered letter sent from Santarém to Lisbon on **May 13, 1929**. Application of the \$30 stamp “Fine”, bisected, to fulfill the mandatory \$15 tax fee. Seal of the Province of Cape Verde – Lisbon Reconstruction Plan.



Registration from Castelo de Vide to Lisbon on **May 14, 1929**. Charter exempt from postage in the national service (S.R.), who sender only paid the registration fee (\$40). Application of the bisected stamp of \$40 fine of the Azores – Monument to the Marquis of Pombal to serve as a \$15 tax fee. Improper application in the light of what is legally stipulated. Obliteration with “French” stamp type. **Single copy.**



Entire postcard sent from Baltar to Porto on May 14, 1929. Due to the lack of payment of the mandatory \$15 tax fee, the stamp of fine of the province of India – Monument to the Marquis of Pombal – was applied to it at the arrival station.



Letter sent from Pinhel to Porto on **May 14, 1929**. In Pinhel, one would not find \$15 tax stamps, so the solution was to apply a \$30 bisected stamp fine – Effigy of the Marquis of Pombal of Madeira. Conduction by ambulance Beira Alta I.



Letter sent from Fermentelos to Oeiras on **May 14, 1929**. In this locality, there were no \$15 tax stamps, so a bisected stamp of \$30 fine of Madeira – Monument to the Marquis of Pombal – was used to deduct the amount of the mandatory tax.



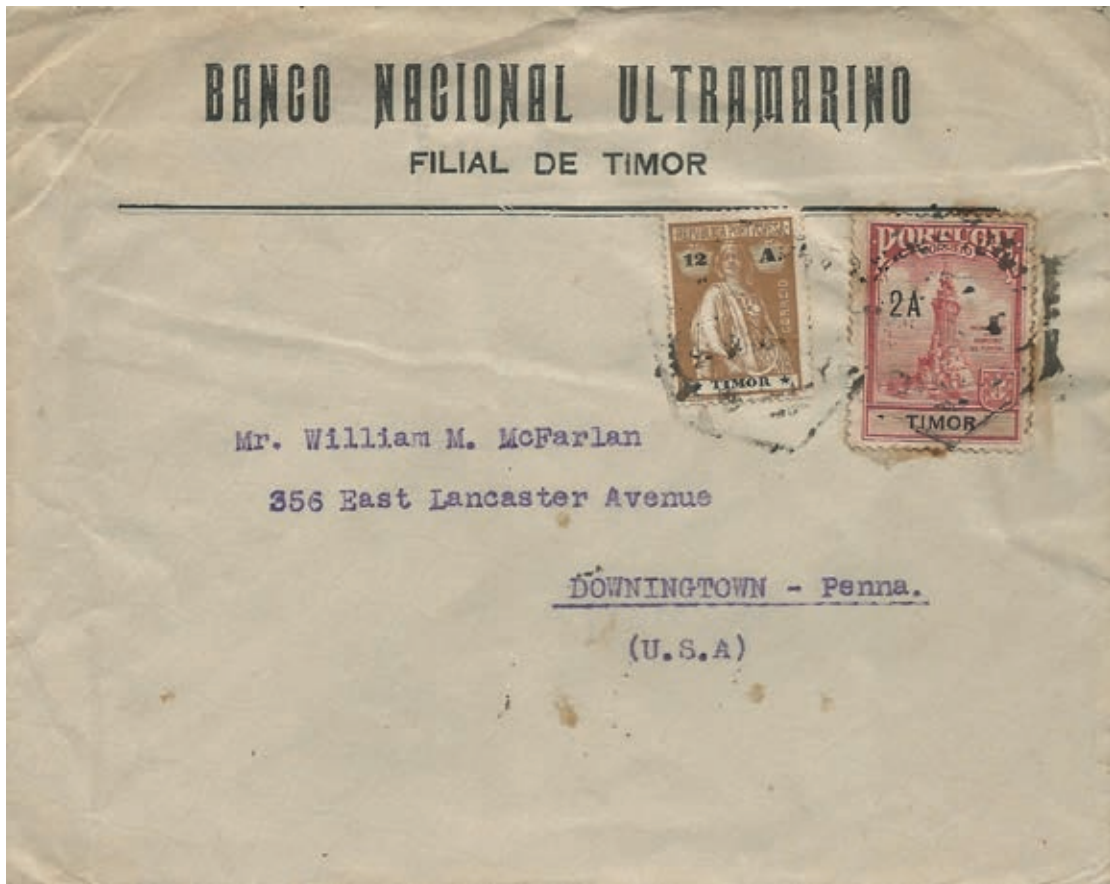
Entire postcard sent from Valinha to Porto, on May 15, 1929 without additional tax fee. It was marked unpaid in Porto with the application of the seal of 4 Avos fine from the province of Macau – Effigy of the Marquis of Pombal.



Letter sent from Gondomar to Maфра on the last day of the application of the tax, **May 15, 1929**. Use of a bisected stamp of 4 Avos fine of Timor – Effigy of the Marquis of Pombal – for payment of the additional fee of \$15 of tax. Circular stamp in lilac with the letter P.R. inside a circle, referring to Posta Rural [Rural Post]. **Only known piece.**



Beautiful and rare letter sent under registration from Paredes de Coura to Lisbon on **May 16, 1929**. Misapplication of the additional \$15 tax fee with the seal of the province of Cape Verde – Lisbon Reconstruction Plan. **The only piece we know of under these circumstances on the Mainland.**



Letter sent from Dili to the United States on **November 24, 1929**. Misapplication of the additional 2 Avos tax rate, as it has no legal application and is not necessary for correspondence to foreign countries. It is, therefore, a double failure in the application of the tax. **Only known piece.**



Piece from São Tomé and Príncipe on **April 23, 1930** towards Switzerland. It transited through Lisbon on May 10 and arrived at the destination on May 13. Misuse of various seals of the Marquis de Pombal postal tax to ensure the tariff for letters abroad. On this date, the seals of the Marquis de Pombal had no legal application.



*Letter sent from Lourenço Marques to Santarém on **May 12, 1930**. Correct postage, except for the application of the \$15 tax stamp – Monument to the Marquis of Pombal, as it was not the official period of its application.*

Upon the official end of the period for the use of the Marquis of Pombal stamps as mandatory additional tax fees, or, in their absence, the special stamps of \$30 fine, one would think that the matter had ended there; however, that was not the case.

In 1934, the Decree-law No. 23,440 (Government Gazette No. 3, 1 ed. of January 4) ordered the use of several stamps in stock and already withdrawn from circulation in all correspondence with legal value. Therefore, the stamps of the Marquis of Pombal Issue of all taxes and provinces were utilized again, as was the case with other issues. When this Decree-law was published, the stock of Marquis of Pombal stamps included several copies in stock.

Consequently, in the period between January 4, 1934 and October 1, 1945 (Ordinance 11,036 of July 24), the \$15 and \$30 stamps of the Mainland, Islands, and Colonies of Cape Verde, Guinea, São Tomé e Príncipe, Angola, and Mozambique, as well as the \$40 fine stamps of the Azores, were allowed to circulate normally on the Mainland and Islands.

The stamps from India, Macau, and Timor, as well as 3,000 copies of each of the other stamps, were on sale for philatelic purposes in the S.I.R. (Information and Complaints Service), until they were completely sold out, which “officially” occurred in 1954.

**Appeal period (January 4, 1934 to October 1, 1945)**

As this period of almost eleven years is not at all what characterizes the Marquis of Pombal Issue, this text illustrates it only with four beautiful examples of the use of the stamps in this period of appeal. The seals could be used alone or in addition to others.



Entire postcard "Ceres" from 2 C Azores sent from Ponta Delgada to Angra do Heroísmo on August 27, 1934. Correct postage of single postcards in the internal service, using a \$15 stamp of the Effigy of the Marquis of Pombal of the Mainland.



Piece sent from Lisbon to Macau on September 17, 1934. Correct postage of 1\$70 using several seals from the Marquis of Pombal Issues of Azores (\$20 Effigy and Monument), Angola (\$30 fine, 2 Plan stamps) and Mozambique (\$30 "Fine" Effigy of the Marquis of Pombal).



Entire 2-cent Ceres postcard of the Azores, sent from Nordeste to Ponta Delgada on September 19, 1934. Correct postage with the use of a \$15 stamp of the Effigy of the Marquis of Pombal of Angola.



Letter from the first air service of the Portuguese Airline Company of Lisbon / Tanger on October 20, 1934. Special commemorative mark of the event "AVION". Correct postage of 3\$50 for letters sent abroad by air (1\$75 simple postage + 1\$75 air surcharge). Use of two \$15 stamps from Madeira with the Effigy of the Marquis of Pombal. Letter signed by pilot Jean Denis and Radiotelegraphist C. Fangeaux.



As one can read in this work, until 1934, all the revenue from the Marquis of Pombal seals was delivered to the Pro-Monument Commission to the Marquis of Pombal. Their only expense referred to the payment to the printing house Waterlow & Sons Ltd.: 5,580 pounds from the first order plus 100 *contos* from the second printing.

Since November 1929, according to the Decree No. 17,664, the revenue that the Commission had at its disposal for the period of mandatory application of tax stamps and in the absence of fines, was replaced by an annual sum of 270 *contos*, coming directly from the funds of Posts and Telegraphs. Even so, all this effort was not enough. Only with a state reinforcement of over 50 *contos* was the Monument completed, which was inaugurated on May 13, 1934.



*Maximum postcard, false, with the Monument to the Marquis of Pombal. Maximaphily is one of several philatelic disciplines. The result is a trinomial of perfect and concordant conjugations between the stamp, the illustrated postcard or other, and the obliterating stamp. It turns out that the postcard presented only includes an agreement on two items, which are the stamp and the postcard itself. The stamp, although from Lisbon, is dated **November 12, 1926**. On that date, the Monument had not yet been completed.*

## CONCLUSIONS AND COMMENTS

In the Portuguese philately, one could hardly find a more appropriate philatelic issue that is, at the same time, closely linked to the reason for its creation. This relationship is truly unique and unrepeatable.

Safeguarding the particular point of view of each one, and the historical facts associated with the Marquis of Pombal, we all know that this statesman is not nor was he liked by all. For this or that, there are those who idolize him and those who mistreat him. Sebastião José de Carvalho e Melo is probably not a unique case. One may also state, for all that has been previously narrated, that the issue in his honor could not be more controversial, not only due to the time it took to be materialized, but also for all the struggles to conceptualize and materialize it over the years. Additionally, during the several years when the Marquis of Pombal seals were used, the most correct, obvious, and regular path was not always followed. There were clear violations of the laws and decrees approved that regulated the procedures and, in many cases, they were passed over as if they did not exist. Just as the statesman revolutionized his time with his great vision of the future, as well as his ability to shock and overthrow established interests, so did this issue. From the philatelic point of view, it managed to overcome many things and achieve its purposes, albeit in a somewhat misguided way, so as not to use one or more less sympathetic adjectives. Analogically speaking, the Marquis of Pombal was above everything and everyone, and this issue in his honor also managed to do so.

From the point of view of any mere observer, but in possession of the information presented here, one can legitimately ask: how was it possible to have so much abuse and so much nonsense, so much non-compliance, when the regulations were so clear? How was it possible for there to be a shortage of seals at stations, when millions of stamps were left over, when millions more were burned, when a few more were made again? We know that, in smaller stations or with less geographical importance, these failures were more evident, but they also happened in large cities such as Porto. Using stamps broken in half to comply with the tax or pairs of tax stamps to work as a fine would not remind anyone with the millions of stamps produced.

On the other hand, it is easy to ask why there were so many stamps produced when there were still thousands of stamps left – given that, after several years of use, most of them, along with the time span of their use, were not even foreseen in the initial project.

The precepts of the regulations were clearly not always complied with. This non-compliance is more visible in our colonies, although violations also appear on the mainland. The Marquis of Pombal postal tax overseas was perpetuated far beyond the approved period for each year and also beyond the regulated years. In the colonies there was the misuse of tax stamps outside official periods, but also the use of stamps without any legal support, when it was not valid and utilized in normal correspondence.

In the many years spent researching this issue and studying the scarce correspondence that has survived, no element that could explain all these failures of the Postal Administration was found. One initial hypothesis was that ignorance of the law could justify the situation in many cases; however, the analysis indicates otherwise after the observation of correspondence in which there is supposedly no lack of this information, in addition to the intervention of the Postal Administration itself through its postal stations in breach of regulations. The conclusion is, therefore, that post offices overseas surpassed themselves and did what they wanted and understood as proper in this regard.

Studies are never ended. Today it is like that, tomorrow new data may appear to shed light on the many questions raised around this emission, especially in its overseas use. The errors that occurred on the mainland are understood as excess of zeal or lack of it. These are not very serious errors from the point of view of regularly exceeding what is inscribed in the law.

All letters presented, in which, for whatever reason, there has been a procedure that does not comply with the law or something *sui generis*, their date is engraved in “**bold**” so that we can easily perceive this fact.

Also, and finally, these philatelic “imbalances” allowed me to spend many pleasant years of my life around the Marquis of Pombal<sup>580</sup>.

## ACKNOWLEDGEMENTS

To Luís and Eduardo Barreiros, João Violante, and Pedro Vaz Pereira, for the kind and disinterested provision of the pieces that help to illustrate this work.

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<sup>580</sup> Sources and bibliography consulted: Sources – CTT, Official Bulletin of the CTT, Lisbon, Imprensa Nacional, years from 1882 to 1925; Isabel Vieira, diverse catalogs from the Auctions of the Ateneu Comercial do Porto, Porto, Editions of the Philatelic Nucleus of the Ateneu Comercial do Porto, several years; Paulo Augusto Pedroso Dias, diverse catalogs from Paulo Dias Auctions, Lda., Lisbon, Locape Artes Gráficas Lda., several years; Philatelic Club of Portugal, diverse catalogs from the Auctions of this club, Lisbon, several years; Bibliography – A. H. de Oliveira Marques, *História do Selo Postal Português*, Lisbon, Planeta Editora Lda., 1995; António Arroyo, *O Caso do Monumento ao Marquez de Pombal*, Lisbon, Tipografia A Editora Lda., 1914; Armando Mário O. Vieira, *Selos de Recurso Circulados em Portugal Continental*, Porto, Núcleo Filatélico do Ateneu Comercial do Porto, 1987; Francisco Lemos da Silveira, *Correio Aéreo em Portugal (1900-1945)*, Lisbon, Edições Inapa, 2001; João Manuel Lopes Soeiro, *Notas sobre o Correio Aéreo Português*, Évora, Edições O Timbre/Diana Litográfica do Alentejo, 1997; Pedro Marçal Vaz Pereira, *Os Correios Portugueses (1853-1900)*, Lisbon, Coingra Companhia Gráfica dos Açores, 2021; *Selos Postais Colónias Portuguesas*, technical guidance J. Miranda da Mota, Lisbon, Edição Mundifil/GTO 2000 Sociedade de Artes Gráficas Lda., 2019; *Selos Postais e Marcas Pré-Filatélicas*, technical guidance J. Miranda da Mota, Porto/Santo Tirso, Edição Afinsa/Tipografia Nova, 2007.



José Eduardo Franco, Christine Vogel and Luiz Eduardo Oliveira (Coordinators), by Bernardes Franco.

Having achieved international fame during his lifetime and becoming the political figure most written about inside and outside his native country, the national importance of the Marquis of Pombal was confirmed in 1934, when a monumental statue was erected in his honor in the center of Lisbon, Pombal. However, until today he is the object of polemics and controversies, in universities and at the tables of bars, where, throughout history, supporters and opposers of his political and administrative acts dispute primacy, making the mythology of the Marquis of Pombal something alive in Portuguese culture. In addition to taking care of his own image, Pombal organized a powerful propaganda scheme that did not exclude symbolic paintings, medals, panegyrics, sonnets and theatrical plays in his honor, exerting absolute control over his own biography. However, if during his government his supporters and sycophants glorified him, there were few who remained by his side after the death of D. José and his fall from government, during the so-called “viradeira”. This book, which brings together a team of experienced researchers dedicated to studying of the Pombaline period, is a proof that the Marquis of Pombal, being one of the most fascinating and controversial characters in European history, is part of a central and decisive moment in the history of the Portuguese empire, but also in the process of organization and unification of Brazil.

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VECHTA  
LISBOA  
ARACAJU

