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*The role of the military in political transitions:
from the 18th century to the present day*

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KEYNOTE SPEECH

THE MILITARY AND THE REGIME CHANGE IN PORTUGAL

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Methodological considerations

This essay identifies and aims to explain one of the various originalities of the Portuguese society: the role of the military in the regime change in the contemporary era.

It is true that we find that the military play an important role in regime changes in other Southern European societies, such as Spain or the Italian States. However, in none of them do we see what we see in the Portuguese situation: the military always being the main protagonists in regime changes over the past two centuries. To find a similar situation, we would need to take a look at Ibero-America, where most of the states formed from the Iberian empires at the beginning of the 19th century experienced a vast proliferation of coups and military interventions, some of which led to regime changes.

In Europe, Portugal is a unique case. Even in neighboring Spain, famous for its bloody and prolonged civil wars, many regime transitions were led by the military, but the transition from Francoism to modern mass democracies was carried out by a peaceful movement within society, without the military playing a leading role.

For the purpose of this study, we understand a “regime” as the set of institutions with sovereign powers that govern the state, as well as the values that inspires them and we will not have major concerns about scholastic definitions. The connection between institutions and values is important for the definition of a regime, because what is often significant is not the existence of certain sovereign bodies, but rather the values that govern them and that translate into their relationship with society and the way they

operate. As an example: both the First Republic as well as the *Estado Novo* (Portuguese dictatorship – 1933/1974) or the modern democracy after 1974 theoretically vested legislative power to elected assemblies with similar names. These assemblies were actually very different political houses, due to the values of the regimes they were part of. In the First Republic, for example, the houses were constituted from elections where only 10% to 20% of the population participated (something normal at the time). However, many of the elections from 1910 to 1926 were of dubious democratic legitimacy, even by the standards of that time, because certain political forces were prohibited from participating, and others were subject to constant pressure and violence from armed civilian groups, who beat candidates in the streets, set fire to newspapers, and looted party headquarters and centers – practices that were not typical at that time in Europe. During the *Estado Novo*, elections were merely a formality, clearly undemocratic, with no freedom of organization or expression, so the National Assembly was chosen by the single party; it was the government that created the legislature and not the other way around, as evidenced by the fact that no opposition deputy was ever elected. It is a typical case of very different regimes that can only be identified as such through the connection between the dominant values and the formal institutions, as these might seem similar by the mere wording of the Constitution.

I intend to delve deeper into the reasons for this Portuguese originality in contemporary Europe. Note that the norm in most of Central and Northern Europe is for regime changes to occur peacefully, without a prominent role for the military, mainly through the accumulation of small, seemingly insignificant transformations that eventually lead to a regime change, sometimes accompanied by civil unrest, but not by open military intervention. Even in the case of more violent societies that experienced numerous revolutions in the contemporary period (such as France or Russia), violent movements typically originate from the civilian world (the French Revolution, the movements of 1848 or 1871, the revolutions of 1905 and 1917) and not from the military. In the case of Portugal, it is the opposite: almost all transformative movements are exclusively military, with a single exception (1910) where the military are predominant, but we find a significant component of armed civilians in the movement.

The Portuguese originality in this field requires the development of theories adapted to this reality, different from those applicable to other societies. Trying to apply the concepts about the role of the military developed for the great powers to Portugal, as most authors do, yields poor results. It is like measuring potatoes using liters as the unit of measurement. History is, more than any other field of knowledge, the domain of diversity, where general patterns can be distinguished. However, it is always necessary to understand that each case is original and unique.

A second point to emphasize is the impossibility of understanding reality through a single level approach. In the case of Portugal, to understand the role of the military

in society, it is necessary to conduct a multifaceted analysis. It is necessary to take into account Portugal's integration in the international system, its particular connection to the Atlantic, the role of the colonies and the Empire in contemporary society, how new techniques reach society as well as the role of a large state fueled by external revenues, the corporate values that shape a society ruled by a gigantic state, a political system that functions based on clientelism and which is characterized more by factions than parties, with none of this being official or contemplated in the Constitution.

The arrival of liberal values to Portugal at the beginning of the 19th century is the starting point of this process, but its effect can only be understood if we connect it to the loss of Portugal's relative power in the international system and its consequences, particularly the fact that Portugal ceased to dominate the technologies of the industrial revolution, which have marked the transformation of society in Europe since 1780. It is certain that, even before, dynasty changes had always been violent (1383, 1580, 1640), marked by both internal and external wars. However, these were dynasty changes and not changes of regimes or values. The regime remained the same (absolute monarchy), but the reigning dynasty changed. The rules and patterns we will identify only apply to the contemporary period, especially since it has a very particular understanding of what the military are, as citizens in arms.

The entry in the contemporary period

The internal role of the military in recent Portuguese society is directly related to how Portugal entered the Contemporary Age. The transition from the Old Regime of the 18th century to the liberal and urban structures of the 19th century is traumatic and difficult. It is a process that takes place in the context of the French invasions, the most destructive wars that Portugal has ever experienced in its entire history, which is evident in the fact that this was one of the few periods in which the absolute population decreases. The invasions lead to the departure of the Court to Brazil (1807), the installation of the English in high-ranking military positions, the complete alteration of traditional economical circuits, and a drastic change in the Armed Forces. All this is paired with a substantial decline in Portugal's relative power in the international system, within the framework of the establishment of a unipolar system of English hegemony, which would be formalized in the Congress of Vienna (1815).

The decline in Portugal's relative power is reflected in numerous factors. The most important fact is the opening of Brazilian ports to ships from all countries, a measure the Court had to accept upon arriving in Rio de Janeiro, as England would not allow the continuation of trading between Brazil and Portugal while it was occupied by the French. The opening of the ports led to the end of Portugal's role as a trade hub for Brazilian products, with the establishment of dozens of English trading houses in Brazilian cities and the encouragement of the independence of this large colony.

The end of the trading monopoly with Brazil is irreversible and enshrined in the 1810 treaties with England, at a time when Junot no longer occupies Portugal, but the country depends on military support from its ally. In these treaties, London guarantees national Independence and the continuation of the House of Bragança on the throne, and in return, receives extensive commercial privileges in Brazil, where its goods have advantages even over Portuguese ones. At the time, it was difficult to reach a different agreement, as without British military and financial aid, it would have been impossible to fight the invaders. The opening of Brazilian ports signified a shift in the economic model on which the Old Regime in Portugal was based, leading to a reversal of important structural factors in the national economy. Until 1807, the revenue from Brazilian products was the main income for the Royal Treasury, with a consistently positive trade balance. After 1807, the Royal Treasury fell into crisis and became dependent on loans from England, while the trade balance turned consistently negative.

To understand the importance of this, it is enough to mention that trade with Brazil in 1800 represented about 10% of Atlantic trade and passed through Lisbon by legal requirement; after 1808, trade with Brazil reached Europe via London, with only a small part passing through Lisbon (which came to represent less than 2% of the Atlantic trade). For a Court that relied primarily on customs revenue, this was a fundamental change and a massive decline in relative power. Furthermore, the change in trade routes hastened Brazil's independence (1822), and after that date, few Brazilian products arrived in Europe via Lisbon. It was the price Portugal paid to maintain its independence in the face of the French invasions.

A factor reflecting the decline in national relative power is the Navy's loss of capacity to control the ocean. The Court moves to Brazil, accompanied by 15,000 individuals, including nearly the entire nobility, senior military hierarchy, high administration officials, and renowned scholars and academics and it takes a fortune of roughly 200 million *cruzados* (Portuguese currency at the time) which is equivalent to about 4 years of national exports. The delegation includes the personnel who are part of vital institutions for the Navy, such as the Royal Academy of Naval Guards and the top technicians from the Arsenal, the *Cordoaria* (institution that was dedicated to the manufacturing of ship material) and the naval administration. Everything is transported by a vast fleet of over 40 commercial ships, escorted by 8 ships of the line and as many frigates, corvettes, and brigs. It is almost the entire navy and merchant fleet that departs to Brazil, carrying the best men from the main institutions supporting naval power. In Portugal remain only the ships that cannot sail, either due to a lack of crew or because they are in poor conditions. After arriving in Rio, this high-sea fleet loses its traditional functions. Ships of the line are considered an unnecessary luxury and, to save money, are disarmed and remain anchored for many years in *Ilha das Cobras*.

The reason why the Court accepted the disarmament of the ships of the line is simple to understand: it was no longer necessary to defend the monopoly of Brazilian trade, which was legally extinguished, and the vital naval functions in the ongoing war in Europe were ensured by the Royal Navy, which had many ships available after the victory at Trafalgar and did not require Portuguese naval support. A navy was still needed in Brazil to support the wars in Guiana and Rio de la Plata, but a coastal action fleet was sufficient, making it unnecessary to maintain the expensive ships of the line. The Court's limited funds are used to reorganize the Army in Brazil, as it is the vital element for the ambitious ventures in South America. The Navy is neglected and peacefully decays.

While this was happening, Portugal was occupied by Junot (1807/1808) and subsequently had to face other French invasions. The defense of European Portugal against the invader became primarily a financial concern of England. It was England that ensured the freedom and control of the seas in European waters, financed the rearmament of the national army (through national debt), and commanded it in the Peninsular War.

Today, with the wisdom provided by time, we can say that if the Court had been more foresighted, it would have known that without a strong Navy it would not be possible to maintain Brazil for long. It was actually not even possible to effectively fight the actions of the privateers from the former Spanish colonies a few years later. These privateers captured dozens of national merchant ships starting in 1814, causing a severe financial crisis. Simply put, the understanding and priorities that prevailed at the time were different.

From the 8 ships of the line that sailed to Brazil in 1807, only one returned to Portugal in poor conditions. The others decay anchored in Rio de Janeiro. The Navy, which had 14 ships of the line in 1807 only had two by 1820. Thus, Portugal's capacity to exert oceanic naval power disappeared, never to return. The Navy, which did not lose a single ship of the line in combat, was annihilated as if a massive battle had dragged it to the bottom of the ocean.

The third factor illustrating the loss of national power is the independence of Brazil, which is part of the process of the dissolution of the Ibero-American empires, hastened by the destruction of the central apparatus of the Iberian kingdoms (Portugal and Spain). The independence of Brazil was a logical consequence of the opening of its ports, but King John VI managed to counter the natural trend by approving, in 1815, the status of "United Kingdoms", whereby Brazil ceased to formally be a colony, and the Court remained in Rio de Janeiro. Given the circumstances at the time, this was the only way to maintain the connection with the great South American empire.

For the Portuguese on the mainland, who felt the loss of the country's role as hub for Brazilian products, the perspective was different. To them, Portugal seemed like a "colony of its colony", governed by a regency that appeared dominated by the English,

with the capital of the “united kingdoms” in Rio de Janeiro, where the Court remained after 1814. To aggravate the situation, public finances were in a disastrous state, maritime trade suffered from the actions of South American privateers, and the long-promised fundamental reforms were not progressing. All this was happening after wars that involved the extensive mobilization of the population based on a new nationalist speech and the creation of an Army with a renewed officer corps, trained by the English and coming from different social backgrounds than the previous one.

The combined result was the revolution of 1820, an orderly military coup without resistance, primarily motivated by wounded patriotic pride. Its main immediate objectives were the return of the Court and the expulsion of the English from the military high command, along with the medium-term goal of restoring Brazil to at least political and administrative subordination.

The revolution accelerated developments in the relations with Brazil. The Courts, driven by the best patriotic spirit, dismantled the political elements of moderation in Brazil created by King John VI, without having the strength to enforce a return to dependence. Brazil, which had been formally a “united kingdom” since 1815, was once again treated as a colony, precipitating its independence. When an attempt was made to hastily assemble a fleet to subdue the insurgents in Rio, it became clear that naval power could not be improvised, and the Navy, neglected since 1807, could not form a significant force. All that could be mustered was a small fleet of four ships, without a single ship of the line. Forces of this size were insufficient to prevent the Brazilian fleet from dominating the seas, which was commanded by experienced and inspired British officers. The small Portuguese fleet achieved nothing and was humiliated by the Brazilian authorities, who magnanimously allowed it to return to Lisbon when they could have sunk it.

Another essential factor in the decline of national relative power was the loss of the ability to keep up with progress and technical innovation, at a time it was evolving at an unusually rapid pace due to the Industrial Revolution. It is enough to remember that before 1807, Portugal manufactured all the weaponry it needed using local technicians, instruments and raw materials. The ships of line, were, for example, the most complex “weapons systems” humanity knew in 1807, and the 14 that Portugal had were domestically manufactured – the hull, the armament, and the rigging. They were equivalent to the ships of the line of any great power, although they were not as large as the biggest ones. This gave the image of a power that was in step with technical progress and had an autonomous capacity to develop and project military force on an intercontinental scale until 1807. Then, everything disappeared in a matter of days.

The first steam engine, for instance, only arrived in Portugal in 1820 – imported from England, of course. It was not until the mid-19th century that an internal capacity to produce rudimentary steam engines was developed. This represented a delay of over

50 years in relation to the 1st Industrial Revolution, at a time when innovation was accelerating.

Overall, we have the image of a traumatic and turbulent transition into the contemporary era as the kingdom lost much of its relative power. Before 1807, Portugal was a second-tier power, controlling roughly 10% of the Atlantic trade and about 8% of the general oceanic trade. It had a vast and healthy empire in the Americas, manufactured the most complex weapons systems, maintained a fleet of 14 ships of the line, and had an army of 50,000 first-rate soldiers across various continents. After 1807, Portugal became a third-tier power, without a high-seas fleet and technologically stalled. The difference is enormous and was intensely lived by the Portuguese of the time, especially because the transition was accompanied by a terrible war.

It is often said that England won the Napoleonic Wars with its own pounds and the deaths of others. In the case of the Peninsula, this statement is especially true. Despite the English army operating primarily in this region, civilian casualties far exceeded British military losses. This was an inevitable result of the scorched-earth policy and relentless warfare, with extensive mobilization of irregular forces. More than 10% of the population was armed in 1811, as in addition to the 50,000 first-rate soldiers, there were over 200,000 militias and ordinances. This represented the most significant military effort in the nation's 8 centuries of history.

This explains why the keyword for the entire 19th century in Portugal is the cry of "Regeneration". It expresses the desire to return to a past that, although recent, belonged to an international system that had vanished and would not return. In 1820, we have the first regeneration; the civil war of 1828-1833 is presented by the liberals as the second; the *setembristas* (term given to the political wing of the liberal movement that is further to the left) justify the revolution of 1836 as the third; the pronouncement of 1851 would be the fourth; the republicans present themselves as the "regenerators" of the nation from 1870 onwards, especially after the 1890 ultimatum. It is the pursuit of a glorious past through "regeneration", and the fact that this term is repeatedly invoked clearly shows that it is never truly achieved.

Another characteristic of the transition that is of particular interest to us is the change in the attitude of the military. Before 1807, the Armed Forces were that of the typical Old Regime, with an officer corps primarily drawn from the nobility and subordinated to political power. After 1807, the change was swift. The officer corps was largely renewed, with hundreds of members coming from urban sectors that had distinguished themselves in the national uprising against the invaders. These new officers were trained and framed by British officers in schools controlled by England, and that naturally employed their methods. This process mainly affected the Army, as London did not interfere with the Navy, which was left decaying in Brazil.

This fact explains why the Army became the driving force behind the establishment of liberalism, while the Navy essentially remained loyal to the political power without notable sympathies for the liberal cause. When the civil war broke out in 1828, the Army was divided, but the Navy remained loyal to King Miguel. It is worth noting that in the initial phase of the war, the highest-ranking naval officer on the liberal side was a second lieutenant, and the only ship to switch sides to D. Pedro was a small schooner. Even this vessel was later brought back to the *miguelista* side by its crew when its commander went ashore in Gibraltar to pay respects to the British authorities. The liberals had to improvise the naval squadron that ultimately secured their victory using ships obtained from England, France, Brazil, and the Azores, armed with credits from the London financial market and primarily crewed by British officers, naturally commanded by an English Admiral, the notable Charles Napier.

The difference in attitude and behavior between the new and the old Army is immense. Previously, there was total subordination to the Court and to political power. After 1808 and up to the present day, all the important changes in political structures or regimes in Portugal originated from the Armed Forces. What we aim to examine is the process and mechanisms through which the military exercised this function in Portugal and the reasons behind it.

Continuity and rupture in contemporary national political structures

In the Contemporary Era, Portugal experienced five regime changes, all promoted by the military. Four of these were clear because they involved a change in the Constitution, while the other (1851) maintained the constitutional framework, but included a revision accompanied by a change in values and the functioning of the political system. Of these changes, three led to a new political stability relatively quickly (1851, 1926, and 1974), while the other two (1820, 1910) opened a prolonged period of instability, with formal or latent civil wars. Four of these changes represented a modernization of democratic institutions; only one installed a dictatorship (1926).

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In 1820, Portugal experienced its “liberal revolution”, an official name that is somewhat inaccurate because it was actually a military coup. The movement began in Porto when its regiments took to the streets, assembled in an orderly manner at the Santo Ovídio Square, and listened to speeches from their Colonels, who called for the “constitution” and the return of the Court from Brazil. The military also proposed a third measure: the departure of the English officers who continued to dominate the higher ranks of the Army. Afterwards, the regiments returned to their barracks in the same orderly manner, and the “revolution” was over. A *Junta* was formed in Porto, prominently

featuring the Colonels and leading merchants who were discontent with the end of the trade monopoly with Brazil.

The Regency of the Kingdom in Lisbon (the Court was in Brazil) did not even consider resisting the Porto movement, as it knew the program was popular among the Army's officer corps. Indeed, sometime later, the regiments in the capital assembled in Rossio, listened to proclamations from their commanders, and created an alternative *Junta* to that of Porto. From then on, the only remaining issue was the fusion of the two *Juntas*, especially since the Court in Brazil expressed support for the movement and agreed with the Constitution and returning to Lisbon.

The "liberal revolution" was a peaceful and bloodless military pronouncement with a vague program that was popular among the high military hierarchy and merchants. The major problem arose when the Constituent Courts began to legislate and approve disastrous measures that pushed Brazil toward independence. The new regime attempted to respond militarily but lacked the strength, and England soon made it clear that it would not support a war against an independent Brazil.

This fueled the growth of the absolutist party organized around D. Miguel more than anything else, and sparked the beginning of a long civil war, which would continue with smaller civil wars between moderate and radical liberal until the mid-19th century. All these events were marked by military interventions from European powers, carried out either by England alone or by the "Quadruple Alliance" (England, France, Spain, and moderate Portuguese liberals), resulting in 30 unstable and bloody years that constituted the first phase of the Constitutional Monarchy.

The Portuguese economy stagnated due to the end of the Old Regime's economic model, without a real alternative for a population clamoring for "Regeneration".

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In 1851, the military movement of the "Regeneration" broke out in response. It emerged in the aftermath of the *Maria da Fonte* civil war, which began as an insurrection of peasants, continued as a civil war, and ended with European Armies intervening (once again) in Portugal, all arbitrated by London, as usual. At its forefront was Marshal Saldanha, one of the most prestigious military leaders of the moderate liberals, with widespread support from the Army. The movement was driven by the idea that political reform was necessary to achieve stability and economical growth. One of the great ideological inspirations of the movement was Alexandre Herculano, who emphasized the association between political stability and development. According to the movement's inspirers, reform to the political system was essential, and only the Armed Forces could accomplish this.

The Constitutional Letter is amended, but more importantly, a new political system defined by different values is created. Two major centrist parties emerge, which alternate in power. This alternation was not driven so much by elections, but by the “moderating power” of the monarch. The monarch would dissolve the chambers and appoint a government in which he could trust and would organize elections whenever he considered the government to be “worn out”. Since elections were always won by the party in power throughout the Constitutional Monarchy, without a single exception, it was the monarch who effectively decided on the timing of the alternation between the two centrist parties.

Changes brought by the Regeneration initiated one of Portugal’s most significant periods of economic growth, which lasted for four decades (1851-1891). This new economic model was based on political liberalism, the export of a handful of non-industrial products as well as the in the work of emigrants. There was no industrial launch similar to other European states, but the industry did grow, with the promise of greater development once the colonial markets were established. This economic model, known as *Fontismo* (named after Fontes Pereira de Melo), was one of the rare periods when Portugal approached the economic average of Europe, based on political stability, a relatively liberal market, and an explosion of emigration, mainly to Brazil. Interestingly, the promise of a “new Brazil in Africa”, which characterized the entire period of the *Fontismo*, was ironically fulfilled with the discovery of a “new Brazil” in... Brazil.

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The third major change led by the military took place from 1890 onwards, following the crisis of the British Ultimatum of that year (11 of January). It was the most complex and atypical of all movements, spanning twenty years until the republican revolution.

We cannot delve into its complexity here. However, we do need some clues. In very simple terms, the multifaceted crisis of 1890/91 led to the end of the *Fontismo* economic model, due mainly to factors related to the international economic system. The market became heavily protected to develop the industry, which was also oriented towards the intended market in the colonies. The movements of 1891, including a military revolt, brought political instability back to Portugal, leading to the resurgence of military uprisings and, above all, the growth of the Portuguese Republican Party in its nationalist and anti-British form.

The response comes from King Carlos, supported by most of the Army’s officer corps, the so-called “Africanists”, who were involved in more than two hundred sovereignty campaigns in Africa and Asia. King Carlos was inspired by Oliveira Martins’ theories on the need to reform the political system, creating new types of monarchist parties (mass parties, according to Max Weber) that would reclaim control of the urban streets

(Lisbon and Porto) for the monarchists. We will not follow the long process of attempted political reform from the top and from within.

Thrice, King Carlos formed governments that relied not on the chambers but on the monarch's confidence, supported by the Africanist officers. Thrice he was forced to back down, with the last attempt ending in regicide, resulting in the deaths of the king and the crown prince, who supported his father's ideas. The young King Manuel II ascended to the throne, choosing a policy of conciliation under the strong influence of the queen mother. This marks the end of the monarchy!

Between 1908 and 1910, the meticulous work of King Carlos was undone, and the opportunity of reforming the monarchical political system from within was lost. During this period, Africanist officers were removed from the most important military units, especially those in Lisbon. Simultaneously, negligence and tolerance allowed the Portuguese Republican Party (PRP) to create its own private Army, the armed civilian group known as the *Carbonária*, which aimed to violently overthrow the monarchy. In October 1910, the *Carbonária*, through the words of Machado Santos, boasted of having 40,000 civilians (an exaggeration), mainly in Lisbon. The PRP was preparing for a revolution that was supposed to originate from the Armed Forces, although it did not have the support from most of the officer corps (with some influence in the Navy, but almost no support among Army officers).

It is from this original situation that the revolution of the October 5, 1910 emerges. It is the only one of the five movements examined that deserves the definition of a "revolution", mixing armed civilians from the *Carbonária* with a small handful of military units. The revolution was planned solely for Lisbon, where it was expected that most military units of the Army and the Navy would join, repeating what had happened in the "revolution of 1820". None of this occurred. The main naval units in Lisbon indeed joined the republicans, though without the support of the military high command. On the contrary, only two Army units partially joined, totaling about two dozen officers, a minuscule part of the officer corps.

At the decisive moment (the morning of October 4), the main republican military concentration was at Lisbon's Roundabout, with a mere 200 soldiers, commanded by a Navy Officer – Machado Santos – and 9 sergeants (without a single Army officer). The republican revolution seemed defeated, but the control of Lisbon's streets by the armed civilians of the *Carbonária* and the extreme incompetence of the monarchical General Staff, paired with the apathy of the young King Manuel II, led to the unexpected republican victory. On the morning of October 5, the Republic was proclaimed in Lisbon, at a time when the main leaders of the Portuguese Republican Party (PRP) were fleeing in a hurry and the chief military leader of the revolt (Admiral Reis) had committed suicide, believing the movement to be defeated.

It is the most abnormal movement of all five. It is the only one that is not almost exclusively military, incorporating significant civilian participation (from the *Carbonária*), and it is violent and bloody. It does not reflect the ideals of most of the Army's officer corps or even the Navy's. The monarchy falls because its main defenders (the Africanist officers) are discouraged after 1908 and no longer control key positions in military units due to King Manuel's policy of conciliation. Additionally, the monarchical General Staff is incapable of understanding a street fight where armed civilians dominate and makes a series of major tactical errors, greatly facilitating the republican victory.

This reality creates an unstable and violent First Republic (1910/1926), where the regime does not trust the officers of the Armed Forces, promotes indiscipline within military units, and places corporals and sergeants in positions of "supervision" over the officers, while supporting the existence of armed civilian groups that grow significantly after 1910 and persist until 1926.

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The fourth movement is the May 28, 1926, which should be defined as a military coup rather than a "revolution", which is the official denomination ("national revolution"). It is the only one of the five movements examined that is anti-democratic and that aimed at establishing a nationalist dictatorial system and not reforming democracy – the regime emerging from this movement is officially called a "military dictatorship", and was followed by the "*Estado Novo*", from 1933 onwards.

The May 28th movement is a peaceful march of Army units into Lisbon (the Navy remains passive, with few units joining before victory), with no military or civil resistance. The organizers of the May 28th are most of the Army officers, traumatized since 1910 and shocked by the tragic experience of forced belligerence in World War I (WWI). The main organizer of the May 28th is Sinel de Cordes, with Garcia Rosado as the main discreet inspirer, both key names of the Portuguese Expeditionary Corps (PEC) General Staff in France during WWI. Gomes da Costa, the official leader of the May 28th movement (though not the real one), also comes from the PEC. Almost all the officers involved in the movement have served in the PEC in France and established connections there, which they maintained between 1918 and 1926 through dozens of conspiracies, some of which go public, most remain hidden.

In a sense, the May 28th movement is the revenge of the officer corps against all the insults and attacks on their principles since 1910. It is also a movement that fits into the shift of Southern Europe toward nationalist dictatorial regimes between 1926 and 1939, following the rise of fascism in Italy, all of which are inspired by the experience in WWI. The Sidonio Pais political regime in Portugal (1917) was a pioniring experience.

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The fifth and final transition is the April 25, 1974, an exclusively military movement. It is commonly referred to as a “revolution”, but it was actually a coup d’état, with minimal resistance and very little bloodshed. This movement ensured the transition to a Western type of modern mass democracy, leading to Portugal’s adhesion to the European integration movement and a return to the NATO spirit.

The promoter of the April 25th movement is a massive Army (200,000 men) that had been engaged in a three-front war in Africa for 13 years. However, the roots of the movement can be traced back to the military movement of 1958/1961, when the Army, led by the Minister of Defense (General Botelho Moniz), attempted to force the liberalization of the regime and prevent the start of the wars in Africa – an event known as the 1961 *Abrilada*.

The evolution of the Army’s mentality from 1961 to 1974 is similar to that of other nations involved in prolonged insurgent wars, such as France in the Algerian War, the USA in Vietnam, or the USSR in Afghanistan. In all these cases, the Armed Forces initially entered the conflict motivated, believing it would be short, but as the war dragged on with no end in sight, they became critical of the reasons that led to the conflict. However, only in the case of Portugal did this sentiment lead to an exclusively military coup that overthrew the Government.

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Each of these five transitions corresponds to different social structures, mentalities and behaviors. In 1820, we witness the beginning of the end of the compartmentalized and hierarchical society of the Old Regime, a process that had been underway and would continue for many years, never fully completing in all aspects. In 1850, we see the emergence of a mature liberal society typical of the 19th century, which would promote economic development in Portugal. In 1890, we see the transition to the “Portuguese industrial revolution”, with the development of a relatively modest, highly protected industry and, above all, the growth of urban areas, especially in Lisbon. In 1926, we have a situation typical of Southern Europe, where the transition from the elitist liberal democracies of the 19th century to the mass democracies of the 20th century is not easy and leads to the establishment of dictatorial regimes in several states, some of them fascist, others only nationalistic. In 1974, we have the transition to a democratic and post-industrial society, open to the outside world.

We can conclude that the military has played an essential role in regime changes more specifically, four of the five regime changes were initiated by military coups, while

the other one (1890/1910) involved a mixed movement of military and armed civilians, the only one that can be classified as a “revolution”.

Unlike in Northern Europe, Portuguese society does not experience political change through a gradual process of adaptation to evolving realities. When national political structures become misaligned with the surrounding reality, which inevitably happens over time, they fail to evolve and adapt on their own. At best, they are characterized for having superficial reforms, mere changes in name rather than substance, as seen with the “*primavera marcelista*” or the failed reforms of King Carlos. The result is the “*relâmpago num céu azul*” – the violent overthrow of obsolete institutions through a movement led by the military.

Common characteristics

The five previously mentioned movements have common characteristics:

1) These movements are almost exclusively military, with the conscious and deliberate exclusion of civilians. For instance, during the April 25, 1974 coup, no civilians were involved in the preparation, and the main clandestine political parties were only informed at the last moment that a coup was going to take place. The exception is the 1910 movement, made by the PRP.

2) They gather the near totality of the Armed Forces, sometimes through a broad prior conspiracy that sets up an orchestrated network of complicity (as in the cases of the May 28, 1926, and April 25, 1974), and other times through the mere example of a few military units, to which others adhere in an overwhelming domino effect (as seen in the 1820 revolution and the 1851 Regeneration). Again, the exception is the 1910 movement.

3) They do not encounter significant resistance from any important sector of the Portuguese society, whether civilian or military. This means they are coups with very few to no casualties (the only victims of the four mentioned coups were the two killed on April 25, 1974, during the assault on the PIDE headquarters, an initiative not started by the military). This does not mean that all society supports these movements. On the contrary, social sectors related to the elites of the overthrown regime usually remain in a hostile and distrustful expectation, without assuming active and significant resistance. A good example is the attitude of the titled nobility and the high church hierarchy towards the revolution of 1820: they do not resist but also do not support it, waiting to know the position the Court in Rio will adopt. Another example is the attitude of the unions and the republican party towards the May 28, 1926 coup: they do not resist but remain in a fearful, distrustful and passive attitude, beginning to conspire shortly thereafter to return to the past regime. Once again, the exception is 1910, the only movement that can be defined as a “revolution” and the only moderately bloody one.

4) These movements take the form of a march from the provinces to the capital. The revolution of 1820 starts in Porto, with military units gradually and slowly advancing towards Lisbon. The same pattern is seen with the 1851 Regeneration, which first gains the support of the Porto garrison. The May 28, 1926 coup begins in Braga, with widespread support from provincial units, and concludes with a convergent march on the capital. The April 25, 1974 coup originates from various locations but takes the form of a convergent assault on the central power institutions in Lisbon, from units coming from the southern margin of the Tagus River, Santarém and Mafra, for example, while others converge on Porto. It is as if the deep country rises from its places of origin and, with an overwhelming force, destroys the institutions and the functioning of the capital, which no longer adapt to the current needs and are incapable of reforming themselves, and does this with an irresistible blow. The exception is 1910, a movement that almost exclusively starts from Greater Lisbon, with the clear intention of isolating the capital in a military manner, to prevent a “contagion” from the provinces.

5) These movements are driven by a diffuse ideological cement, where the only common thread is the idea of the nation in danger, requiring extraordinary intervention to find the means to be reborn. In 1820, it was the idea that Portugal had become a “colony of its colony”, that the Court needed to return to Lisbon, and that the British must be expelled from the Armed Forces. In 1851, it was the notion that the country needed to “regenerate” after decades of civil wars and internal struggles, requiring a complete overhaul of the political apparatus. In 1890, it was a surge of wounded patriotism following the humiliation of the ultimatum, and subsequently, the rush to effectively occupy the empire, seen as a way to assert the nation on the international stage. In 1926, it was the need to end instability and the control of the despised Democratic Party (democratic only in name). Finally, in 1974, it was the need to find a political solution to the prolonged wars with no end in sight and to bring Portugal closer to Western European institutions.

In each of these cases, there may be, and there usually is, a small, ideologically, coherent political group that initiates the movement but knows it cannot carry it out alone. Therefore, the concern of this group is to create a broad support front with a vague and encompassing ideology where patriotic and modernization motivations are essential. For example, the Synedrium in 1820 or the small group organized around General Sinel de Cordes preparing the May 28, 1926 coup, which did not want to appear as the clear leader of the movement, going so far as to bring in General Gomes da Costa at the last minute to lead it. The April 25th Captain’s movement is another excellent example: a small core of operatives that needed to bring in Generals to officially lead the coup, even though they were not involved in the preparation.

6) These movements, although ideologically and politically vague and diffuse, share the common trait of the main incentive for the military being a sense of patriotism, meaning the idea that the Homeland is in danger and needs to be “regenerated” through

an exceptional movement of “national salvation” (evident in the chosen names such as “*Junta de Salvação Nacional*”, created as the official center of power by the April 25th movement.

7) The movements generally originate from the intermediate levels of the hierarchy, or at least that is where they find their most enthusiastic supporters among the younger generations of officers. Behind the 1820 movement are the Colonels of the Porto garrison. Behind the Africanists are the young Lieutenants and Captains who gained experience in the empire’s campaigns. The ones behind the May 28th movement are the enthusiastic Lieutenants who were Sidónio’s cadets. The ones behind the April 25th movement are the captains, who have the highest rank with direct operational responsibilities in the African wars. The only movement led by a Marshal of the Army (Saldanha) is the 1851 movement, but even then, its support comes from intermediate officers who participated in the previous internal wars. Thus, we see movements that ultimately involve the entirety of the Armed Forces but originate and find the greatest enthusiasm in the intermediate operational levels. These are the ranks that have recently undergone wars and campaigns that changed their mindset.

8) The movements are generally preceded by a series of failed “rehearsals”. These have a specific ideological foundation, which prevents them from achieving widespread support. These rehearsals largely serve to show the movement’s leaders that a broader unit is needed, which implies setting aside political party banners. It is also observed that the failed rehearsals typically originate from the capital, while the more extensive uprisings emerge from the provinces. In 1820, there was the conspiracy of 1817. In 1851, shortly before, there was the complex movement of the *Patuleia* civil war, which very possibly would have ended with the victory of the *Juntas* if not for foreign intervention. In 1926, there were numerous coups preceding the May 28th movement, notably the two in 1925, respectively to the right and left of the ruling party. Even in the case of the April 25th movement there was the failed start in Caldas da Rainha, in March.

9) In all cases, these movements are preceded by significant conflicts that involved an abnormally intense engagement of the Armed Forces and their profound reorganization. The establishment of liberalism in 1820 is preceded by the Napoleonic Wars, which created a type of Armed Forces vastly different from those before 1807. For the Regeneration, there was the civil war of *Maria da Fonte* and *Patuleia*, adding to a long succession of wars and coups since 1828. The movements of 1890/1910 were inspired by sovereignty campaigns. The May 28th coup was carried out by the Armed Forces that were remodeled and had their pride wounded from their involvement in WWI. Finally, the April 25th movement was carried out by the Armed Forces that were engaged in the intense and three-front African wars since 1961.

There is no doubt that these conflicts are decisive in motivating the military, as they convince many that the political power is outdated and incapable of self-reform, and

the regime needed to be overthrown to “save the nation”. It is notable that the officers who enthusiastically support political movements are those who experienced the most intense combat fronts in previous wars: in 1820, it were the officers engaged in the Anglo-Portuguese Army campaigns; in the case of the Africanists, it were the officers from the Mozambique campaigns during Mouzinho’s time; in the May 28th case, it were the officers who served in Flanders, like Sinel de Cordes and Gomes da Costa; in the April 25th case, it were the officers who served in Guinea (more than half the officers who signed the documents of the Captain’s movement had fought in Guinea during General’s Spínola’s period, despite it being the smallest theater of operations).

10) These movements are preceded by the failed attempts of the previous regime of reforming itself. For instance, King John VI had long promised the convening of the Courts, and a commission had been studying the reform of land charters and other essential aspects for many years. Costa Cabral vainly attempted to implement political and financial reforms not far from what Fontes Pereira de Melo would later achieve. King Carlos directly led the reform attempt, supported by the Africanists. The republic carried out significant financial reforms in its final years. Marcelo Caetano finally labeled his policy as “renewal in continuity”, although Sá Carneiro soon called it “blocked liberalization”. All these examples are attempts at reform by the more lucid elements of the previous regime, who understood that things could not continue as they were but failed to create the dynamics for real change.

11) These movements are preceded by somewhat insistent appeals from significant segments of society so that the Armed Forces lead the change, though typically not from most society. Instead, these appeals come from sectors experiencing rapid development and that are the first to feel the obstacles caused by outdated political structures and economic models. In 1820, protests originated from various sources, but mainly from merchants in major cities hindered by the end of the Brazil trade monopoly, and intellectuals like Almeida Garrett, who blamed the “*britanos nevoeiros*” (shady British) for the nation’s decline. In 1851, the clamor against the Cabrais administration was strong, coming from the same sectors behind the *Juntas* movement, and included voices of prominent intellectuals like Alexandre Herculano. In 1890, demands for strong and authoritative governments came from those interested in quickly building the Empire and that were alarmed by the growth of radical movements inspired by Oliveira Martins’ theories and the literary speech of the “*vencidos da vida*” (defeated by life).

By 1926, widespread calls against the Republic and for military intervention were well-expressed in major newspapers like *Século* and *Diário de Notícias*. Finally, the reception of General Spínola’s book *Portugal e o Futuro*, which barely concealed an invitation for the Armed Forces to act, was very telling of society’s general sentiment during the lead-up to the April 25th revolution. The fact that the book’s publication was permitted also indicated the level of disintegration within the *Estado Novo*. Typically, the most effective

appeals did not come from the traditional opposition but from those who had recently supported the regime and suddenly distanced themselves, believing violent action was necessary for renewal. In all cases, a patriotic language was prevalent, with messages about the “nation in danger” and the need for regeneration.

12) These movements are generally preceded by an economic crisis or shock originating from external factors. In 1820, the significant blow is the French invasions and the opening of Brazilian ports. This blow was immediately aggravated in the previous years by a financial crisis. By 1851, there was also a severe financial crisis with a breakdown in payments to the military. The crisis of 1890 was directly triggered by difficulties in exports, aggravated by the financial collapse of the Brazilian emigration and the failure of the London Baring Brothers, which was the traditional creditor of Portugal. In 1926, there was the economic and financial shock due to the previous year’s appreciation of the Portuguese coin, leading to an economic crisis and rising unemployment in the fragile national industry. Even in 1974, we can detect the impacts of the first oil shock of 1973 in Europe, which was immediately translated into difficulties for large Portuguese projects such as Sines, as well as a drop in emigration revenues and tourism.

Notably, all these crises led to an increase in the negative balance of trade and a decline in compensatory financial flows from abroad. In other words, all these crises caused significant difficulties in payment balance and led to a need of reviewing previous financial relations with the exterior.

Needless to say, these crises also resulted in greater internal discontent across various sectors of Portuguese society. Economic and financial crises are a fundamental factor in reversing the support certain sectors had previously given to the former regime, as it becomes incapable of ensuring traditional balances. The sudden shift in support from sectors previously aligned with the former situation typically creates the conditions for a successful movement. It is important to note that, in Portugal, one of the primary economic functions of the state is to distribute public revenues among its clienteles. Therefore, when revenues decrease permanently, the support from these clienteles becomes dubious, and they clamor for “modernization”, which means a return to the financial support of public revenues that had broken down. This is a unique characteristic of Portugal.

13) A final common characteristic is that these movements are accompanied by corporate demands from the military, which help to persuade the hesitant to join and broaden the range activists. For example, in 1820 or 1851, the state had not paid the military for many months; in 1926, there were complaints about career blockages, the degradation of salary levels and the deterioration of military equipment and facilities; in 1974, the famous decree allowing the promotion of sergeants and soldiers under contract to officers played an essential role in launching the captain’s movement. It should be clear that the primary motivation of the military is not the corporate demands;

however, these demands are important in helping to form the broad range of support that enables the coups.

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In summary, we find a wide range of common characteristics in the movements that trigger major changes in Portugal. The historical situations, ideologies, mentalities, people, and specific organizations are very different. One can rightfully say that there is little in common between the *Sinédrio*, the Sinel de Cordes – Raul Esteves group or the captains' movement, just to cite a few examples. But, beyond this apparent anarchy without any connection link, this tangle of passions, debates, and insults, there is a similar guiding thread. Many will undoubtedly be surprised and even offended to hear that personalities as different as Manuel Fernandes Tomás, Fontes Pereira de Melo, Oliveira Martins, and Oliveira Salazar have more in common than what they have different. The truth is that both Salazar and Oliveira Martins or Fontes Pereira de Melo fulfill very similar roles and they even do it from the same institutions (the Ministry of Finance), with language and ideology adapted to the sentiments and mentality of their time. However, the guiding thread transcends the fog of appearances and ideologies, which serve more to justify and mobilize contemporaries than to understand the real forces of change. It is the precise role of History to see beyond this fog of ideologies and circumstances, without getting entangled in the complexity and infinite diversity of facts. Politics is necessarily ideological; History must explain why certain ideologies are suited to the context at specific moments and not others.

The 13 common characteristics do not apply entirely to all 5 identified movements. All 13 characteristics are possible to identify in three out of the five movements (1820, 1926 and 1974). In the Regeneration movement, only 11 of the 13 characteristics (85%) are found. Finally, the case of 1890-1910 emerges as the least patterned, with only 7 of the 13 common characteristics (54%) detected. This discrepancy is understandable because the movement of the Africanists was not formed against the established power, as was the case with the other movements, but rather to support the head of that power (the King) in his attempt at profound reform, overcoming the immense resistance that primarily came from within the existing regime, mainly from the traditional parties.

I recall that in social sciences, it is not necessary for a rule or pattern to be confirmed in 100% of the cases for it to be considered valid; an abnormal repetition is sufficient. When we see that out of the 13 identified characteristics, they are present in 100% of the cases in 3 out of 5 instances and in more than 50% of the cases in the remaining two, I believe we can undoubtedly speak of a rule or pattern (never a "law").

Another characteristic worth noting, also as a rule or pattern and not as a mandatory law, is the rhythm of these movements. They usually occur approximately 40 years apart

(corresponding to a generation of active life) and about 12 to 13 after the start of an intense war in which the military is fully involved.

The military and innovation

The obvious question that arises is of trying to understand the reasons behind this very particular action of the military in Portugal, to the extent that it can be said their main function in contemporary Portuguese society has been to ensure the modernization of political structures, through the violent destruction of those that were outdated and incapable of reform.

In other words: why are the Armed Forces, among all institutions in Portuguese society, called upon to fulfill this very particular mission? The mission itself implies that they modernize and adapt before other institutions. Some might argue that this is due to the fact that the Armed Forces hold the legal monopoly on state violence, meaning they are by definition “armed” (for better or worse), and this can impose solutions on society by force. However, this fact, while essential in operational terms, does not help explain the motivations that drive the military, and particularly the officer corps, to fulfill this function under certain circumstances, nor does it illustrate the mechanisms that lead to the institution’s earlier modernization when compared to others.

Modernization is a vague and imprecise term, even when viewed under historical perspective. I think it is useful to introduce the distinction developed by Schumpeter in the 1930s between invention, innovation and diffusion. Invention refers to the appearance of a new tool or method, which allows the mastery of previously unknown capabilities. Innovation arises as the practical application of this tool or method, which varies according to the fields considered. Diffusion is the repetition and adaptation of the innovation to other cases and circumstances. In this process, the essential phase for Portugal is innovation, and this can be mastered locally, unlike invention, which, generally, arrives from abroad since 1807.

Innovation is directly linked to technology but does not fully coincide with it. It serves as a bridge between technology, which has typically been imported by Portugal in the contemporary period, and the creation of new capabilities through the manipulation of significant aspects such as organization, tactic, doctrines, and strategies of the Armed Forces. It is important to consider that the arrival of significant new technology is only the tip of the iceberg. Innovation is required for it to produce results – adapting to the concrete reality. It is this innovation that creates new capabilities. Over time, we are looking at accumulated effects that can produce a significant change in mentality.

Who could have imagined, for example, that the innocent steam engine used to pump water from mines, which seemed more like a toy and a curiosity in 1780, would be largely responsible for the greatest change in the history of humanity since the invention of

agriculture? And who could have imagined that the first computer, developed in 1943 to help break German ciphers, which looked more like a Christmas tree full of lights and occupied a three-story building, would become so important for all social life? Certainly no one at the time would have believed that it would be the main driving force behind the third great change in the history of humanity, after agriculture and the steam engine.

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All the previously mentioned radical changes in the case of Portugal are preceded and/or accompanied by a broad wave of innovation in the Armed Forces.

In 1820 we witness the broad and sudden transition of the Army from the Old Regime to one of citizen-soldiers with patriotic motivation, sponsored and led by England. In 1851, the Regeneration is preceded by a period of intense internal wars (*Maria da Fonte* and *Patuleia*), accompanied by the arrival of many techniques from the 1st Industrial Revolution, notably the first combat between steamships in Portugal and the widespread use of rifled and percussion cap weapons. In 1890/1910, there is a significant renewal of the Armed Forces driven by an intense pacification campaign, with the arrival of techniques from the 2nd Industrial Revolution, such as steel vessels, repeating rifles (Kropotchev, Nordenfelt), quick-firing artillery with explosive shells, prefabricated pontoons, searchlights, gunboats, modern tropical medicine and others.

In 1926, the movement is preceded by the strong impact of the belligerence in the Great War, particularly in Flanders, where changes in the Armed Forces were once again dictated by England. It is during this time that modern General Staffs, liquid fuel ships, and military aviation arrive in Portugal, just to mention a few. In 1974, the revolution is preceded by two successive shocks: the impact of NATO in the 1950s and the impact of the African wars in the 1960s. Both bring many of the techniques and organizational forms of post-industrial societies to Portuguese society.

We are witnessing waves of innovation, with a strong technological background, that first affect the military due to their involvement in abnormally intense and demanding conflicts. Periods of war (internal or external) are thus an essential element in the entire process, as they bring waves of innovation at all levels to the Armed Forces. This statement is truthful in technical, organizational, operational, tactical, and mentality terms. For example, to understand the strong link between the military and technology one simply has to recall that until well into the 19th century, the largest national manufacturing establishments were military (the Navy and Army arsenals), and engineering in general was dominated by military schools and academies.

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In all the cases considered, to a greater or lesser degree, the change led by the military was preceded by an important conflict that needed the rapid acceptance of a wave of innovation within the Armed Forces, including technical novelties, extensive reorganization, and shifts in mentality.

In several cases, this wave of innovation is totally or partially funded, financed, organized and expedited from abroad. This is evident, for example, with England during the Napoleonic Wars and the First World War, and with the USA during its adhesion to NATO. Additionally, in almost every case, political leaders are unaware of the scale of the changes taking place, and, above all, do not foresee that the mere modernization of military structures entails a complete reorganization and change in mentality. This will eventually create the instrument that brings the regime change years later.

Technical innovation is typically accompanied by a shift in mentalities, which may involve the introduction of new political theories or even ideologies.

King John VI in 1808, for example, only intended to combat the French invaders and, for this purpose, was willing to give England total freedom to reorganize the Army. The Court in Rio de Janeiro had no idea that they were creating the major instrument for the arrival of liberalism in Portugal, nor was this the intention of England. The English, in command of the Armed Forces spread Masonry and liberal ideology among the military and accepted the merit supremacy over birthright (officers were promoted based on their battlefield performance rather than their family origins), completely changing the political reality of Portugal's military.

Afonso Costa's Republican Government, in the same way, only wanted to create an expeditionary force capable of fighting in Flanders, the most challenging front of all, and was very pleased when England offered to finance, transport, train, reorganize and integrate the PEC (Portuguese Expeditionary Corps). How could the First Republic have imagined that it was signing its own death sentence by creating the military force that would overthrow the regime twelve years later?

Neither the governments of Salazar or Marcelo Caetano could have imagined that, along with the jets and NATO radars, the mentality of Western democracies was also arriving, or that with the G-3 rifles and Alouette helicopters of the African wars, a reorganization was taking place that would accelerated the end of the regime.

All these politicians in power were like sorcerer's apprentices, involved in a process they knew how to start but could not foresee how it would end. They did not understand the consequences of their seemingly limited actions, just as some historians still fail to understand today.

Even if the most perceptive politicians could foresee the long-term effects – and it is a fact that Salazar feared the political consequences of contacts with NATO – they

had no real alternative at a time when the country was involved in a conflict without having adequately prepared Armed Forces.

It is indeed possible to detect a similar rhythm or waiting period between the onset of unusually intense conflicts and regime changes. This period is approximately 13 years, noted here as mere pragmatic observation, without implying any rigid or deterministic “law”. Junot entered Portugal in 1807, and the revolution occurred 13 years later, in 1820. In 1851, the *Patuleia* was much more recent but was it only the final point of a long series of wars, pronouncements, coups, and external interventions. The pacification campaigns started with a force in Mozambique (1894/95), and the regicide occurred in 1908, with the fall of the monarchy in 1910. Portugal’s involvement in World War I began as early as 1914, with expeditions to Africa (formal belligerence started in 1916), and the Republic fell 12 years later. The African wars began in 1961, and the *Estado Novo* fell 13 years later.

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In summary:

a) Invention ceased to be predominantly controlled by Portugal since the 19th century, becoming imported.

b) The major waves of innovation in contemporary times tend to reach Portugal through the military, in a process aimed solely at enhancing their effectiveness in a current campaign or war.

c) The process that demands innovation is Portugal’s involvement in unusually extensive and intense conflicts.

d) Innovation causes a shift in mentality and the diffusion of new theories and ideologies, be it of liberalism or anti-colonialism, initially affecting the officer corps.

e) Thus, the officer corps becomes aware of the country’s stall when compared with the outside world and the inability of the government to create reforms. Consequently, they organize themselves to instigate it by force.

f) When this occurs, significant social sectors encourage the military movement, while the sectors connected with the government are divided and paralyzed, which resulted in the movements facing little to no resistance. People in positions of power leave it almost with a sigh of relief.

g) This process was repeated five times in the last two centuries, and it is this process that explains the unique role of the military in national political life.

h) Portuguese society modernizes political structures through a sharp break with the past, after the failures of gradual reforms and adaptations.

i) Everything is influenced by Portugal's unique connection to the international system as well as a strong relationship with the United Kingdom and the United States, the powers that dominate the Atlantic Ocean.

Reasons of the portuguese originality

The reasons and theories we have pointed out to explain the prominence of the military in regime changes in Portugal are also valid for Southern Europe during the same period. In many states in this region, such as Spain, we also observe a strong military presence, both during the liberal period and in the crises of the first half of the 20th century. The reasons are similar: the military tend to change their mindset faster than other social sectors due to their involvement in high-intensity wars, often with the participation of multiple international forces. However, what happens in Portugal is unique: in no other country are the military always the decisive force in regime changes. The question is simple: what is the reason for this originality?

I believe there are three, each with varying degrees of influence in each specific crisis.

The first reason is that Portugal, more than other Southern European states, is highly dependent on the international system in terms of its economic models. Financial flows from abroad are essential to consolidate state power and benefit those who control it. I am primarily referring to emigrants who came to Portugal since 1850, which was crucial for the distribution of internal revenues through the state. Additionally, other flows are also important: foreign investments, external credits (which are essential to the state most of the time), and re-exports, particularly significant in the case of Brazil but also for African products since 1890. Furthermore, it is worth noting that some of the most important Portuguese exports during these years (Port wine, Madeira wine, cork and canned goods) are closely linked to England or to the USA. In some cases, such as Port and Madeira wines, they also depend on British communities established in Portugal who promote the export of these products to their home markets. For example, Port wine was adopted early on by the Royal Navy, which was the cornerstone of British hegemony worldwide. It was the Royal Navy that spread the fame of Port and Madeira wines around the globe.

The second reason is the particular importance of the African colonies to Portugal during these years (at least from 1850 to 1974). Economically, the African colonies were never fundamental, representing, at most a quarter of external trade and financial flows (even with re-exports). However, from a mentality and political perspective, the African colonies were essential. They were the key that gave credibility to the "Regeneration" project, something crucial in contemporary Portugal. Simply put, the "Regeneration"

consisted of creating a “new Brazil in Africa”, creating and strengthening the 3rd Portuguese Empire, the “African Empire” (the 1st one was the Eastern Empire and the 2nd one the Brazilian Empire).

This reality is particularly important for the military because they were called upon, through hundreds of sovereignty campaigns, to make this dream come true. Furthermore, the dream of the “new Brazil in Africa” required a special relationship with England, as it was the primary source of foreign investment, and its diplomatic support was essential to fend off the various threats to the African Empire. Rarely did a year go by without Portugal requesting London’s intervention to resolve international disputes created by the African colonies, at least until 1961.

Finally, the third and most important reason is the particular connection that Portugal maintained with the powers that dominated the Atlantic in the contemporary era. The first of these powers was England (or the United Kingdom currently), with which Portugal was connected through the “longest alliance in the history of the world”, created during the reign of King Ferdinand in the 14th century. The second power to dominate the Atlantic, since 1941, was the United States, with which Portugal also maintained a special relationship, though with a complicated transition. It was due to this special relationship with the US, for example, that Portugal was the only dictatorship invited to join NATO from its creation in 1949. It is worth noting that England and the US are pioneering examples of modern democracies.

It is not surprising that of the five military interventions in Portugal, four were aimed at reinforcing and modernizing the democratic regime. The exception is the 1926 coup, but even that, though not democratic, received favorable attention from England, which had distanced itself from the First Republic regime since the beginning and had already supported Sidónio Pais’ regime in 1917.

In summary, we can say that the secret of Portugal’s originalities lies in its strong connection to the Atlantic. This is true not only in economic terms but also in financial, political, strategic and in terms of mindset. The military has been the privileged instrument to bring the strength of this Atlantic connection to Portuguese society in the contemporary period.

What about the future?

I must emphasize that this process of change only occurs in the contemporary era and was not the norm before the 19th century. This indicates that it is a historical mechanism, and the fact that it can be detected over the last two centuries does not necessarily mean that it will be repeated in the future.

There actually is set of circumstances that make its repetition doubtful.

Firstly, history is not a mandatory and fatal cycle that repeats itself indefinitely. Each case is unique and follows its own rules.

Secondly, the role of the military in society is being rapidly re-evaluated, which is part of the changing nature of conflicts and forms of violence in Europe and in the world. Currently, the military is called upon to perform new functions, such as engaging in ecological crises or responding to pandemics, all linked to the great ecological crisis on planet Earth.

Nowadays, Portugal has unusually small Armed Forces in terms of numbers. This is undoubtedly a new situation in the contemporary era, which suggests a shift towards involvement in conflicts of a very different nature from those in the past.

Portuguese society is more open to the outside world than ever, to the point where it is becoming questionable whether we can still speak in terms of traditional sovereignty. Nowadays, the impacts of international system developments are strong and direct in an open society advancing towards globalization, where the distinct traits of each particular formation tend to fade, making it uncertain whether national originality will persist. Inventions continue to arrive mainly from abroad, but through channels that primarily direct them to the civilian world rather than the military.

Currently, in a world of increasing interconnections and globalization, it is equally difficult to conceive national evolution with great autonomy in a region such as Western Europe. Military coups and even revolutions were relatively common in Southern Europe from 1820 to 1945, but nowadays they are rare, despite the recent trend towards increasing internal violence in European societies.

I have saved perhaps the most important element for last. In recent years, Portuguese institutions have changed. Their traditional corporatism, their closed nature, their usual inward-facing way of functioning, lack of pursuit of efficiency, absence of competition, and lack of competitiveness and innovation are gradually decreasing, albeit very slowly. This means that, nowadays, more than in the past, there is the possibility for institutions and those in power to reform themselves through their own decisions, in a gradual process led by those in power, as is the rule in advanced democracies. It is not certain that this will happen, because those who are privileged always cling to the structures and logic that benefit them. However, even though this is not certain, the chances of it happening are greater and reduce the need for abrupt and violent change.

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