

A freeborn Azorean who chronicled Portugal's contemporary politics

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The historian José Medeiros Ferreira, who left us this year at the age of 72, will be remembered as one of the most remarkable figures of the “1962 generation,” as one of the chief architects of the pro-European reorientation of post-revolutionary Portugal, as well as someone who intervened in the academic and public debates of his country with a spirit of unflinching rationalism.

Raised in Ponta Delgada, Medeiros Ferreira (b. 1942) was a Philosophy student at the Faculty of Letters when he joined the student struggles that in 1962 defied the Estado Novo regime in a series of memorable protests. He proved to be a courageous and charismatic spokesman of the students' movement, succeeding Jorge Sampaio (the future leader of the Socialist Party and later President of the Republic) as the Secretary of the Inter-Association Conference. This notoriety, however, came at a price. In November of that same year, he was detained by the secret police, PIDE, and held in isolation in the Aljube jail for a short period. Having joined the Democratic Opposition lists for the 1965 elections, he would once again be punished by Salazar's regime—this time, he was expelled from all Portuguese universities for a period of three years. Medeiros Ferreira later claimed that this suspension was a kind of blessing in disguise, since it encouraged him to look for a new life in a free and democratic society. In 1968, the prospect of having to fulfill his military service in Africa, fighting a war to which he was opposed, persuaded him that the time had come to leave Portugal. With the encouragement of other oppositionist friends, he settled in Switzerland and managed to secure the status of a political refugee, as well as gaining a university fellowship.² Four years later, he graduated from the Faculty of Economics and Social Sciences of Geneva University (1972) in History, and he was immediately offered a teaching position. The cosmopolitan traditions of the city, as well as the accessibility of several archives, were important stimuli for his engagement in the study

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² For his Swiss experience, see Victor Pereira's article in Medeiros Ferreira's *festscrift*, “O exílio português na Suíça.” In Maria Inácia Rezola and Pedro Aires Oliveira (eds.), *O Longo Curso. Estudos em Homenagem a José Medeiros Ferreira*, Lisbon: Tinta-da-China, 2010: 305-330, as well as António Barreto et al., *Pátria Utópica. O Grupo de Genebra Revisitado*, Lisbon: Bizâncio, 2011.

of International History, a field that had been undergoing a significant methodological renovation since the 1950s. With a relatively light teaching burden, he was able to carry out some research related to the topic of his planned PhD dissertation—a history of the League of Nations in the interwar period—but events in Portugal soon led him to change his plans. On April 25, 1974, the Armed Forces Movement (MFA in the Portuguese acronym) deposed Marcelo Caetano’s regime and created the conditions for the restoration of democratic freedoms in Portugal. Interestingly (and he never missed an opportunity to remind everyone of his prescience), Medeiros Ferreira had already anticipated the demise of the dictatorship in a remarkably accurate way in April 1973, when the paper that he presented to the 3rd Democratic Opposition Congress in Aveiro (“Da Necessidade de um Plano para a Nação”) postulated that the armed forces, given their “inter-classist” and “national” characteristics, were the only institution capable of acting as the catalyst of a decisive political change in Portugal.³ His paper (or “thesis”) also laid out the fundamental steps needed to solve the nation’s basic impasses—“democratization,” “development,” “decolonization,” and “socialization.” The first three of these struck a chord with leading elements from the nascent MFA (whose existence Medeiros Ferreira was unaware of at the time), who were keen to convert them into their slogan “*Democratizar, Descolonizar, Desenvolver.*”

The appeal of the Carnation Revolution proved too strong to be resisted and, along with his family (his wife Maria Emília Brederode dos Santos and their only son Miguel), Medeiros Ferreira decided to make a fresh start in Portugal. His return to the academic world, however, would be postponed for a couple of years. Until it happened, he was actively engaged in the politics of Portugal’s democratic transition, first as a member of the Constituent Assembly, and then as a Secretary of State (1975-76) and then Minister for Foreign Affairs (1976-77). In this latter capacity, he worked closely with Mário Soares on developing the diplomatic strategy that would allow Portugal to put forward its application for full EEC membership in March 1977 (in the latter part of his life, which coincided with the cooling off of Portugal’s “Euro-enthusiasm,” he would confess, in a somewhat ironic tone, that he no longer felt sure if this decision, in which he still took great pride, would be looked upon in such a favorable light in years to come).

His re-immersion in historical research was to take place in the late 1970s, after leaving the government, following political and personal differences with Soares. He accepted an invitation from A. H. de Oliveira Marques to join the History Department of

³ José Medeiros Ferreira, “Da Necessidade de um Plano para a Nação”. In *III Congresso Republicano da Oposição Democrática*, Tese, 8ª secção, Lisbon: Seara Nova, 1974: 11-22.

the recently founded Faculty of Social Sciences and Humanities of Lisbon's New University, from which he retired in 2008 (although with some "sabbatical leaves" every once in a while, due to his spells as both a European and national member of parliament). He was also able to benefit from an invitation by Mário Pinto, of the Catholic University, to embark on a study of the April 25 revolution, the result of which would be his *Ensaio Histórico sobre a Revolução do 25 de Abril: o período pré-constitucional* (1983), one of the first scholarly analyses of the political struggles of the period to be written by a Portuguese historian. This became the bedrock for his contribution to José Mattoso's *História de Portugal*, the volume *Portugal em Transe*, published in 1994. There we can find some of the distinct features of Medeiros Ferreira's historical approach. No longer influenced by the kind of "soft-Marxist" analysis that had been the hallmark of his first writings (in journals like *Polémica*, published in Switzerland with other fellow exiles, such as António Barreto, Ana Benavente, Carlos de Almeida, Eurico de Figueiredo, and others), he now favored a more institutionalist and elitist reading of the social and political processes. The MFA and the political parties, as well as other actors supported by such bodies as the Church or the Masonry, were presented as the fundamental protagonists of the revolution's critical phase, quickly filling the void created by the sudden collapse of the dictatorship. His perspective was clearly a top-down one, with nearly all the landmark events and decisions being shaped by those institutional actors, leaving little room for "grass-roots" activity. In *Portugal em Transe* he expanded the scope of his account, both in chronological terms (1974 to c. 1986) and in terms of the themes he chose to dissect—the social and economic aspects of the revolution, the setting up of the new autonomous regimes in the archipelagos of the Azores and Madeira, the emergence of a strong municipal system, the role of the Church, as well as a brief reference to collective behaviors and mentalities. Important sections were also devoted to the decolonization process (the rationale of which he attributed to the will of "European Portugal" to divest itself of its "overseas constraints"), and to the interplay of domestic and international factors in some of the outcomes of the revolution's struggles. With his penchant for aphoristic formulas, he described the balance of power of post-authoritarian Portugal, in terms of social dominance, as "a Republic of revolutionaries between 1974 and 1975, a Republic of politicians between 1976 and 1982, a Republic of businessmen between 1982 and 1990, and a Republic of bankers and journalists from 1990 to the present day."⁴

⁴ José Medeiros Ferreira, *Portugal em Transe*. In *História de Portugal*, José Mattoso (ed.), vol. VIII, Lisbon, Círculo de Leitores/Editorial Estampa, 1994: 277.

While, in Braudelian terms, the focus of *Portugal em Transe* might be situated somewhere between the *événement* and the *conjuncture*, his previous work, *O Comportamento Político dos Militares: Forças Armadas e Regimes Políticos em Portugal no Século XX* (1992), based on his doctoral dissertation, offers a long view of the political behavior of the armed forces in the twentieth century. Although his style might appear somewhat dry, it would be misleading to equate this with some sort of positivism—the quest for an approach based on concrete problems is evident in this, as well as in many of his other historical works. The guiding question of this particular inquiry was the nature of the relationship between the military institution and the various political regimes that shaped contemporary Portugal, from the last days of the liberal monarchy to the post-revolutionary democracy of 1976. Among its key insights is the rebuttal of what can be dubbed the myth of an endemic intervention of the armed forces in the nation’s politics, with a bias for authoritarian solutions. The main conclusion of his research was that it would be wrong to look for a long-term “pattern” in the *pronunciamentos* that took place in the twentieth century; against this “essentialist” background, he argued, the historian should make an effort to situate each crisis in its proper political and social context. Based on an ample variety of sources (including many international archives), the book provided a number of original interpretations for some of the key episodes of Portugal’s contemporary politics in which the military were implicated, in particular during the authoritarian regime of Salazar and Caetano. While he cautioned his readers against the perils of “essentialist”/teleological approaches, he put forward the case that, throughout the nineteenth and twentieth centuries, the armed forces had evolved into something that could be described as the guarantor of the state’s continuity and were compelled to intervene against civilian governments not for ideological reasons but whenever they perceived a serious threat to the national interest. For this reason he suggested that the junior officers’ movement that carried out the April 25 revolution should be seen as a “metamorphosis of the military institution,”⁵ the expression of a muted but widespread dissatisfaction in its ranks with the stalemate created by the Estado Novo’s refusal to accept the inevitability of decolonization.

For many readers, however, Medeiros Ferreira’s name will perhaps be mostly associated with the field of international affairs. He was regularly called upon to comment on such matters in the Portuguese media, not only on account of his communication skills (he had a captivating television presence) and vast political experience but also due to his scholarly expertise.

⁵ José Medeiros Ferreira, *O Comportamento Político dos Militares: Forças Armadas e Regimes Políticos em Portugal no Século XX*, Lisbon: Estampa, 1992: 335.

His appetite for international politics can be dated back to his years of exile in Geneva, where he was able to collect data for a short and groundbreaking study on Portugal and the 1919 Paris Peace Conference.⁶ After resuming his academic career in the late 1970s, he conducted an open seminar specially dedicated to the study of foreign policy, which helped to encourage the revival of this subfield. Even though many of his reflections on international and security matters appeared in the mainstream press (he was for many years a regular contributor to *Diário de Notícias*), he soon began to publish research articles in scholarly journals when such academic outlets became more common in Portugal in the 1990s. Some of his pieces concerning the history of Portugal's foreign policy were full of refreshing intuitions and thought-provoking insights, which opened up new perspectives for a younger generation of historians.⁷ Although his intermittent presence in the academic world prevented him from becoming a more active supervisor of postgraduate students, he was nevertheless able to inspire and guide a significant number of dissertations that dealt with original topics related to the history of Portugal's foreign policy. For those of us who had the good fortune of having Medeiros Ferreira as a teacher, it was a sheer pleasure to watch him fighting against the unquestioned assumptions and easy consensuses that still permeated much historical analysis, a critical attitude that is evident in his book *Cinco Regimes em Política Internacional* (2006).

Even though his health had suffered a serious deterioration since 2011, he remained incredibly active and full of plans for the future. His final book, published shortly before his death, *Não Há Mapa Cor-de-Rosa—A História (Mal)Dita da Integração Europeia* (2013), a 164-page essay based on a series of academic lectures delivered after his retirement, is a wonderful summary of his reflections on the history of European integration and of Portugal's role in such a process, as was recognized by many.⁸ His ability to blend historical analysis with shrewd comments on the present condition of the European project was unique among Portuguese intellectuals. We will all miss him very much.

⁶ José Medeiros Ferreira, *Portugal na Conferência da Paz: Paris 1919*, Lisbon, Quetzal, 1992.

⁷ See, for example, "Características históricas da Política Externa Portuguesa entre 1890 e a Entrada na ONU". *Política Internacional*, 6, 1993: 113-156, and "Os Regimes Políticos em Portugal e a Organização Internacional da Europa". *Política Internacional*, 22, 1995: 5-39.

⁸ See Pedro Lains' review, "Para a História da Integração Europeia no Século XX", *Relações Internacionais*, 40, 2013, pp. 217-220.