

The Role Played by Joaquim Romero Magalhães in the Creation of the Course of Economic and Social History at the University of Coimbra

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Abstract

This article summarizes the academic career of Joaquim Romero Magalhães (1942-2018) and highlights his role in creating the discipline of Economic and Social History at the University of Coimbra, as well as in Portugal as a whole. Romero Magalhães's historiography forms part of the international discussions that have taken place about the relationship between history and economics and emphasizes the challenging and belated institutionalization of Economic History in the Portuguese academic sphere. Both this lengthy delay and his academic affiliations, in particular the influences he drew from the *Annales* School, help us to understand both how he perceived history and how he sought to write it. The article also includes a description of the process followed in the creation of the discipline of Economic History at the Faculty of Economics of the University of Coimbra and explains the scientific and educational understanding that Romero Magalhães assigned to economic and social history.

Keywords

Portugal; History; Economics; Historiography; University of Coimbra; Romero Magalhães

Resumo

Este artigo sintetiza o percurso académico de Joaquim Romero Magalhães (1942-2018) e coloca em evidência o seu papel na criação da História Económica e Social na Universidade de Coimbra e em Portugal. O artigo enquadra a historiografia de Romero Magalhães nos debates internacionais sobre as relações entre História e Economia e salienta a difícil e tardia institucionalização da História Económica no espaço académico português. Esse retardamento e as filiações académicas de Romero Magalhães, particularmente as influências que recebeu da Escola dos *Annales*, ajudam a perceber o modo como entendia a História e como a procurou escrever. A criação da História Económica na Faculdade de Economia da Universidade de Coimbra e o entendimento científico e formativo que Romero Magalhães atribuiu à História Económica e Social completam o artigo.

Palavras-chave

Portugal; História; Economia; Historiografia; Universidade de Coimbra; Romero Magalhães

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Joaquim Romero Magalhães (1942-2018) was a leading Portuguese historian who was also very well-known abroad. He gained his expertise in early modern history and played an important role in the institutionalization of the discipline of Economic and Social History in Portugal at the Faculty of Economics of the University of Coimbra (FEUC), where he taught from 1973 to 2012.²

Born in Loulé, in the Algarve, he was the son of a high-school teacher—who was also a writer—and a piano teacher from the Faro School of Music. Upon completing high school, he pursued his studies at the University of Coimbra in 1959. In the following year, he decided to abandon his pursuit of a law degree and study history, a path that he shared with several other prominent Portuguese historians. Although his time as a university student was marked by a period of national cultural stagnation, he helped to break down Salazar's oppressive regime and gave his support to the burgeoning opposition movements. In 1963, Romero Magalhães was a member of a student fraternity called *Prakistão* and president of the University of Coimbra Student Theatre Group, and, in 1964, he was President of the Coimbra Academic Association. Studying at a small-minded and inward-looking university, he sought to expand horizons in the cultural life of the academy and amid the student movement.

He defended his graduate degree at the Faculty of Arts of the University of Coimbra, in 1967, submitting a bold thesis on economic and social history, a kind of historical chorography about a peripheral region in the sixteenth-century Portuguese maritime expansion, namely the Algarve. The book was published in 1970 by Edições Cosmos and caused quite a stir in the apathetic world of Portuguese historiography, which, at that time, had only just begun to address the subject of economic and social history.

After a very short stint as a secondary school teacher, he began his teaching career at the Faculty of Economics of the University of Coimbra (FEUC) in 1973. Before then, from 1967 to 1970, he was drafted into the army and served in Africa during the most intense period of the Portuguese colonial war. He completed his PhD in 1984 with a dissertation that he submitted to FEUC entitled *O Algarve Económico, 1600-1773*, supervised by Vitorino Magalhães Godinho, which rapidly came to be considered a remarkable essay in Portuguese historiography and was later published by Editorial Estampa in 1988. A historian of the *Annales* School, Magalhães Godinho faced dictatorial powers and

² I have based these short bibliographical notes on both my own notes from the time when I socialized with Joaquim Romero Magalhães at FEUC and on information graciously provided by the family as well as on the biographical overview by Maria Eugénia Mata and Nuno Valério, included in the volume of essays in tribute to Romero Magalhães: "Joaquim Romero Magalhães", in A. Garrido, L. Freire Costa and L. M. Duarte (eds.), *Economia, Instituições e Império*, Coimbra, Almedina, 2012, pp. 13-19.

ensorship and revolutionized Portuguese historiography. Godinho challenged the imperial historicism of the *Estado Novo* and saw in Romero Magalhães his principal disciple in the context of the cultural and scientific backwardness surrounding Portuguese universities.

Romero Magalhães took his examination for tenure as a full professor at FEUC in 1993, submitting a bold report for the creation of a master's degree in the History of Europe, an academic route he had begun to follow when Portugal joined the European Economic Community in 1986. He became a Full Professor in 1994 and retired in 2012.

History and Economics

History had already achieved a broad institutional expression and become established as a state science in the late nineteenth century, even in Portugal, a peripheral country on the European stage. Through its connections with economics and sociology (which were originally limited to law schools), and benefitting from a broad critical approach, history paved the way for the development of unprecedented epistemological combinations (Pereira, 2010: 27-28).

As with other scientific revolutions, the interdisciplinary affirmation of History found its main vehicle in economic and social history. In this strengthening process, however, it had to produce arguments that could help it compete with other sciences and to fight for institutional recognition in order to guarantee its individual status. In the famous *Combats pour l'Histoire* (1952) and the incisive *Apologie pour l'Histoire ou métier d'historien* (1949), Lucien Febvre and March Bloch, respectively, had already begun to lay the foundations for economic and social history. The founders of the *Annales* movement spearheaded this renewal by countering the intentions of Simiand and Durkheim, who sought to unite the social sciences based on the sociology model, something that Romero Magalhães seems never to have forgotten in the way he taught economic history at the University of Coimbra.

In an unprecedented intellectual revolution, History became associated with the *Annales* movement, responding to problems by combining geographic and material bases with the categories of social analysis inspired by Durkheim's work (Curto, 2013: 27). Despite reciprocal gaps, economic history made impressive progress after the Second World War in England, France, and Sweden. In other countries, such as Portugal, progress was slow and sometimes peculiar. As Hobsbawm noted, in general "the study of economic

mechanisms was divorced from that of the social and other factors which condition the behavior of the agents who comprise such mechanisms” (Hobsbawm, 1998: 118).

This reformist movement and the affirmation of economic and social history were also due to the efforts of economists and some of their theories. Joseph A. Schumpeter’s views on the relationship between economics and history are well-known and particularly charismatic, especially when he called for an understanding of the interdependence of social phenomena and warned that, in essence, the object of economics is to study the nature of the “historic process” itself. According to the Austrian economist, whose analysis Romero Magalhães endorsed, development is not only an economic phenomenon but also a structural civilizational process, since it involves multiple dimensions. Schumpeter flattered historians and went so far as to argue that most of the errors made in economic analysis were due to a lack of historical knowledge rather than to any weaknesses in “economic science” itself (Schumpeter, 1996).

The reflections and claims made by John Hicks (1904-1989), who advocated that “historical time” is an essential category in economic analysis, were no less sensitive to the incorporation of the historical perspective and of historians’ working methods into “Economics.” In one of his most challenging books, *A Theory of Economic History* (1969), Hicks proposed an analytical balance between general and specific phenomena. In this essay, often quoted by Romero Magalhães, the British economist defended a balance between regularities and occasional facts, a combination that was designed to achieve an integrating perspective on human activities (Hicks, 1969).

Critical opinions voiced by several authors have recently come to the fore to question the view of neoclassical economics and to prompt economists to return to history, since mainstream economics tends to exclude social and political factors from economic analyses. These promptings call for the deep rooting of the economy in institutions in general and in political power in particular, an approach that the *Annales* historians had already incorporated into their interdisciplinary and globalizing method. This critical view of the Economy in its purest form intuitively endorsed by Romero Magalhães, rejects the reductionist and imperial concept of economic science.

Invoking Karl Polanyi’s economic anthropology and other original references, Pierre Bourdieu was one of those who fared better in renouncing an economic thought that was purged of historical or ethnological references. According to the French sociologist, Economics is rather “the paradoxical product of a long collective history,

endlessly reproduced in individual histories, which can be fully accounted for only by historical analysis” (Bourdieu, 2000: 15-18).

The Long Road Followed by Economic History in Portugal

The institutionalization of economic history in Portugal was a slow affair, marked by specificities that were typical of the country’s semi-peripheral or intermediate status (Wallerstein, 1984). Despite the prospects opened up by historians who rejected the historicism cultivated by the *Estado Novo’s* teaching and propagandistic policies, economic history was late in beginning to make its appearance.

Due to the longevity of Salazar’s regime and the government’s constraints on social sciences, economic history emerged and established itself as a discipline that was separate from other realities. As a result of the ideological stifling of the Portuguese university and the stigma linked to the Marxist connotations of the words “economic” and “social,” historical research and the teaching of history only progressed as part of a historiographical counter-culture. It is no coincidence that until the revolution of April 25, 1974, most of the historians who succeeded in renewing Portuguese historiography did so outside the system. They were high-school teachers, publicists, and intellectuals, partly influenced by Marxism and, in some cases, by the structuralist and globalist influence of the *Annales* movement (Magalhães, 2009: 14-16).

Despite these signs of a rapprochement with economic and social history, the discipline began its life in Portugal outside the academic sphere and away from the formal context of higher education. The Faculties of Letters of Lisbon, Coimbra, and Porto, created under the scope of the positivist reformism of the First Republic, were slow in developing an interest in economic history. For a long time, research and teaching were based on the publication of documents and on a belief in an eminently archive-based erudition, creating a gap that was difficult to bridge in view of the international historiographical vanguards (Magalhães, 2009: 10-11).

Ways of Writing History: A Historiographical Profile

Romero Magalhães combined historical erudition with an almost literary style and a scathing sense of irony. He regarded history as a writing craft that was centered on explanation, but he refused to surrender to its rhetorical embellishments. He was always of

the opinion that research based on the study of documents and other historical sources compelled the historian to develop an archive-based ethics and to use these traces of the past in a two-pronged view of the instrument of evidence and the imaginary horizon: firstly, the publication of sources, and, secondly, their study and analysis.

Romero Magalhães was influenced by the great French historiographers of the *Annales* School, mindful of the concepts and methodological resources of various social sciences but averse to sociologisms, and he did not believe in a poetic approach to the archives. He did, however, regard both the archives themselves and the archivist as mediating agents between the historian and the state (Granger, 2013: 110-11), hence his concern with the Library of the Faculty of Economics of the University of Coimbra (where he was a teacher of librarianship) containing an extensive bibliographical collection on economic and social history—on History, in general—thanks to his commitment and vision.

As a bibliophile and a humanistic historian, he imagined historiographical problems and developed research ideas based on the reading of old booklets, leaflets, travel writings, speeches, memoirs, and other printed documents. This daily practice, not only for research purposes, but also for the preparation of his classes in economic history and other subjects, formed the basis of his working method.

As a research historian, he combined his mastery of the archives with an enormous analytical intuition about the contexts of human action and the predicament of historical processes. Attentive to the nature of spaces, he easily combined Braudel's *longue durée* with other time-concepts and scales in order to explain the relationship between the action and the *milieu*. Romero Magalhães's historiography shows various traits that he inherited from Braudel, but one of them is particularly striking: time is also geographical while history includes multiple intertwined temporalities and requires the researcher to look for the dialectics of globality—sets and subsets. He used his narrative imagination to breathe life into those contexts interwoven with human and institutional action.

“World temptation” (Granger, 2013: 181-96), or the utopia of devising a history of the empire's spaces and powers, mindful of the ties, encounters, and trading links that existed between them, is evident in several works by Romero Magalhães, even though the author never actually called it “global history.” Following the publication of *Os Descobrimentos e a Economia Mundial* (1963-1971), by V. Magalhães Godinho, and the history essays by António Sérgio—as well as the work by Jaime Cortesão, whom he greatly appreciated—Romero Magalhães strove to determine why Portuguese society in the

modern period was commodified so early, while nonetheless being far removed from the vanguard of modernization.

Romero Magalhães's historical analysis never lost sight of the structures, contexts, historical and geographical problems, and other heuristic categories disseminated by the *Annales* School. He never lost his identity as a historian and he studied economics in order to understand society in its seemingly static structures and transformations. When he focused on social history, he appeared not to forget Le Roy Ladurie's warning about the "imperialist nature" of that discipline. This attribute took hold of all aspects of history, since it was closer to other social and human sciences to which it owed numerous analytical tools (Duby et al, 1994: 56).

Romero Magalhães dealt more with the socioeconomic transformation of spaces and people while taking account of the micro-scales and a certain geographical determinism. He focused on the topography of powers without forgetting Marx's premise, whereby an economy is always historically specific (Hobsbawm, 1998: 124). The explanatory descriptions he made about the social organization of a particular *space-time* were chiefly concerned with the way that men produced and distributed the product of their labor. The theoretical and methodological influences of Romero Magalhães's historiography never appeared contradictory with regard to his very own style of writing and thinking for himself.

Many of his works were intended to encourage his students and to open up new horizons. He was the sort of teacher who got involved in research work and never wanted to be a researcher who did not teach, or someone who thought classes were unnecessary for writing better history. The wealth of publications that he left us with—books, chapters in collective books, essays, and more than one hundred papers—are a measure of his fine writing and reflect his historical erudition. Some of his published works on such important topics of early modern history as the municipalities, the Inquisition, and tax laws in the Brazilian empire were collected together in five volumes, which he named *Miunças*, published by Imprensa da Universidade de Coimbra, the last work published posthumously.³

Romero Magalhães was a remarkable historian who wrote with the simplicity of a genius. He was thoroughly familiar with the art of writing, but challenged it intuitively, seeking a logical explanation in sources that would be capable of giving meaning to human action.

³ For a bibliography on Joaquim Romero Magalhães, updated in 2012, see the final section of the collection of memorial tributes: A. Garrido, L. Freire Costa and L. M. Duarte, *op. cit.*, pp. 617-28.

As an academic, he believed in persistent reformism, in using reason, and in democratic decisions. He was emotional, forthright, and always committed to the public cause. He served as chairman of the Executive Council of FEUC between 1985 and 1989, a position that he held once more, between 1991 and 1993. He was also chairman of the Scientific Council of the same Faculty, between 1989 and 1991.

Economic and Social History at FEUC

In the final years of the *Estado Novo*, it was already difficult to stem the tide of the intense movements for the reform of Portuguese historiography, especially in the field of economic and social History, which was the discipline that had most transformed the way of seeing and making history in other countries. The long life of the Portuguese dictatorship did not prevent economic history from being included in the curricula of various universities. This growth was due to the progress of research in that specific area and indirectly to the dynamics of economic growth and European economic cooperation of the country, which stimulated the expansion of the teaching of economics, as well as engineering.

At the height of Marcelo Caetano's government when Schools of Economics were very much in demand and technicians specializing in economic planning and administration were lacking, the Minister Veiga Simão decided to create a Faculty of Economics at the University of Coimbra (Decree-Law Nr. 521 of December 15, 1972). The decision was fully supported by the heads of the Faculty of Law, where political economy had been taught since the nineteenth century. FEUC began its activity in 1973-4, still during the dictatorship period. The economics and business administration courses—attended by two hundred students, and with curricula that closely followed those of ISEG—conferred undergraduate and postgraduate degrees. Joaquim Romero Magalhães was hired and took office on October 4, 1973 (Ferreira, 2003: 111).

The first economic history course in Portugal was included into a degree in economics at the Lisbon School of Economics (now ISEG) in 1972, under the direction of the historian Joel Serrão, several decades later than in various developed countries. One year later, Romero Magalhães was entrusted with the coordination of the discipline of Economic History at FEUC (named *História Económica I e II*). Similarly, in 1972, the chair of Economic History was placed in the hands of the economist Alfredo de Sousa (1931-1994) at the new *Instituto Superior de Ciências do Trabalho e da Empresa* (ISCTE – Higher Institute of Business and Labor Sciences).

Why teach history at a Faculty of Economics? Assuming that economics is not an independent social science—this sensible understanding was more common at the time than it is today—the pedagogical assumptions of that initial course were entirely in keeping with the dynamics of the renewal of historiography that was finally gaining momentum in Portugal.

The status of the discipline of economic history in the curricula was not that of a residual subject, nor was it placed in a subordinate condition subordination in the overall plan for the Economics course that had recently been inaugurated in Coimbra. It should be remembered that this was a period of major turbulence in the international economy, with external turmoil being caused by the 1973 oil crisis together with the domestic uprising of the April Revolution and the first experiences of freedom.

The Economic History syllabus designed by Romero Magalhães combined the holistic views of the *Annales* School (Braudel, Ladurie, Meuvret, Morazé, and Vilar) with a few Marxist elements; it also encompassed Schumpeter's and Kondratiev's economic development cycles, and the growth and development approaches of Kuznets and Perroux, as well as some Political Economy considerations drawn from the German Historical School (List and others). The subjects that he taught in the first years covered such important matters as monetary questions and the history of prices (the American Hamilton, the French Labrousse and Simiand, and the essential work by Magalhães Godinho, *Prix et Monnaies au Portugal*). As it was a mandatory annual course for first-year undergraduate students, the subjects spanned the early modern and contemporary periods, without overstepping the boundaries into the "history of the present." Most of the lessons covered the structures and contexts of the relevant period, its economic thought and crises—presented as "cyclical economic fluctuations" of capitalism.

The course did not just explain the relevant theory and the different methodological positions, it also conveyed a subtle educational message to students: nothing is exogenous in economic history. Explaining economic phenomena involves understanding the balance of power, social relations and mental representations, or the "psychology of society," as Keynes referred to all of these ideas (Keynes, 1919, 9). Overburdened with economic theory and the models based on its internal logic—albeit fewer than today—economics students were encouraged to develop an awareness of the historical dimension of economic analysis and to recognize that only history allows for the study of the different forms of economics in its interactions and balances of power. The fundamental assumptions of Romero Magalhães's economic historiography highlighted the

relevance of economic facts throughout history and the need to convince students that economics is universal insofar as the economy affects every aspect of human life.

Establishing a symbolic relationship between history and economics was a challenging utopia that made it necessary to assert the autonomy of historical discourse in the education of future economists. In contrast to the reasoning of *Cliometrics* regarding the heuristic nature of that relationship, Romero Magalhães believed that the teaching of history in an economics course would be all the more useful if it could establish its own autonomy, standing alone and avoiding copying “economic science” (economics). Some of the ways of helping future economists to follow the call of the Marxist economist Pierre Vilar—“thinking historically” (Congost, 1997)—was to offer concepts of time and promote interpretations with historical depth. In the education of economists, History was regarded as an indispensable tool for working in companies and organizations as part of a global social reality.

Following the turmoil of the years immediately after the revolution in Portugal, the teaching of economic history at FEUC was strengthened in the 1976-77 academic year with the introduction of the subject of the economic history of Portugal into the study program for the degree in economics. The first chair of the discipline was occupied by the medievalist A. H. de Oliveira Marques, one of the most prominent Portuguese historians, who had long believed in the importance of economic and social history in university education.⁴ This chair was created at the initiative of Joaquim Romero Magalhães, who, in the meantime, had transferred to the Constituent Assembly and had been sworn in as Secretary of State for Educational Guidance in two governments headed by Mário Soares (1976-1978).

Despite these developments, economic history was definitively established as a discipline in Portugal after the revolution of April 25, 1974. The country’s political democratization and social transformation further encouraged the adoption of economic history, particularly economic and social history, at all the Colleges of Economics and Arts and Humanities. These dynamics soon expanded and were strengthened even further. The launch of the journal *Revista de História Económica e Social* in 1978 and the foundation of the Portuguese Association of Economic and Social History in 1980, both at the initiative of Vitorino Magalhães Godinho supported by a group of young teachers that included Romero Magalhães, were real breakthroughs. It only took a short time for Portugal to have a network of researchers in this field of expertise. The extraordinary open-mindedness of the Portuguese Association of Economic and Social History and its vibrant scientific meetings have been key to the affirmation and internationalization of economic history in Portugal.

⁴ Cf. Jaime Ferreira, “Nos 30 anos da FEUC”, *Notas Económicas*, Junho 2003, pp. 102-34.

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