

Managing Diversity in the Portuguese Empire¹

Francisco Bethencourt²

Abstract

The production of diversity and its transformation into hierarchy and social inequality in the Portuguese Empire are at the core of this essay. Conversion of local populations and slaves to Catholicism was the main strategy used by the Portuguese Empire to create allegiance and reduce diversity. Recognition and integration of indigenous institutions into the imperial political system meant indirect rule at local level and the acceptance of some degree of institutional hybridism with different normative layers. However, slave trade, slavery and classification of populations with discrimination and exclusion of indigenous people constantly produced inequality, while colonial violence and the assertion of Portuguese rule changed local dynamics of power.

Keywords

Management, Diversity, Imperialism, Colonialism, Universalism, Violence, Racism, Hierarchy, Inequality, Slavery, Trade, Religion, Normativity, Hybridism, Rule, State

Resumo

A produção da diversidade e a sua transformação em hierarquia e desigualdade social no Império português estão no centro deste ensaio. A conversão de populações locais e escravos ao Catolicismo foi a principal estratégia usada pelo Império Português para criar lealdade e reduzir diversidade. O reconhecimento e a integração de instituições indígenas no sistema político imperial significou governo indireto a nível local e aceitação de um grau de hibridismo institucional com diferentes camadas normativas. No entanto, o tráfico de escravos, a escravidão e a classificação das populações com discriminação e exclusão de indígenas produziram constantemente desigualdades, enquanto a violência colonial e a afirmação do domínio português alterou as dinâmicas locais de poder.

Palavras-chave

Gestão, Diversidade, Imperialismo, Colonialismo, Universalismo, Violência, Racismo, Hierarquia, Desigualdade, Escravatura, Comércio, Religião, Normativa, Hibridismo, Norma, Estado

¹ The research I did for the project *Rise and Fall of the New Christian Trading Elite, 1496-1773*, supported by the Leverhulme Trust (2017-2019), influenced the argument I develop here. I thank Cátia Antunes for her sharp comments to the original version of this essay.

² King's College London, United Kingdom. *E-Mail*: francisco.bethencourt@kcl.ac.uk

Diversity is at the core of every empire. Diversity of people, food, commodities, beliefs, and ways of doing and thinking, is integral to the accumulation of territories resulting from imperial drive. The logic of conquest and submission produces ethnic and social inequality, while diversity feeds the economy of empires due to extended access to strategically valuable products and labour. In many cases, as with the late Eastern Roman Empire or with the Habsburg Empire of Charles V, political pageants have displayed representatives of peoples from distant areas to symbolise the universalism of empire. However, universalism would bring with it inevitable tensions between the centrifugal forces of growing inequality, which threaten secession, and centripetal forces that promote a reduction in diversity and increase in uniformity. Behind the material and symbolic construction of empires, we find colonial violence: commodification of people resulted from the act of enslavement, the slave trade and slave labour; while punishment and massacres for subjugation imposed a legacy of trauma among survivors (Mbembe 2017). This essay will focus on social diversity, although racial constructions and economic dimensions will be included into the picture. It will address two issues that have guided my research: diversity not as given but as produced; and diversity as related to, and transformed into, hierarchy and inequality.

The development of the Portuguese empire was based on trade. There was no political project of expansion other than the initial drive to invade North Africa, which started with the conquest of Ceuta in 1415 and was followed by a series of military expeditions directly launched or sponsored by the King. North Africa was seen as an extension of the Christian re-conquest of Iberia, firmly controlled by the royal family, who delegated the management of the conquered ports to noblemen in their immediate circle. The expansion to the Atlantic and then to Asia, although defined by the direct involvement of the king, who reserved some monopolies of trade while guaranteeing protection costs, was pushed by significant emigration. From 1415 to 1800, out of a population that rose from one to three million, around 1.5 million Portuguese emigrated overseas, the vast majority to the Americas (Godinho 1991). This was the highest rate of emigration from the centre of a European empire until 1800.

Portuguese emigration overseas was responsible for the development of settlements in different parts of the world, settlements generally built close to existing local communities, or in some cases on previously uninhabited islands, as in the Atlantic (Madeira, Azores, Cape Verde, São Tomé). In Asia, the conquest of strategic hubs, such as Goa, Malacca and Hormuz, created the backbone of the fragmentary *Estado da Índia*, while in other cases trade

and diplomacy contributed to the acceptance of fortified structures by local powers. The Portuguese presence in different ports of the Persian Gulf, the Bay of Bengal, Southeast Asia, and Eastern Asia resulted from merchants' initiative, defining what George Winius called the shadow empire (Winius 1971). The same trading initiative justified the Portuguese presence in West, Central West and Southern Africa; with a few exceptions, the state arrived late and did not manage to have a clear hand in hybrid structures, other than the main trading ports, such as Luanda, until the end of the nineteenth century. The Portuguese presence in Brazil resulted from the same bottom up process, although the division of the territory into domains occurred through the awarding of land by the king to seigniorial lords, the so-called donataries-captaincies, whose governance coexisted with that of a central government created in Bahia in 1549. This practice continued well into the eighteenth century.

Expansion is always the result of push factors, practice of violence and local conditions of resistance. Structural economic and social conditions in Portugal created the push factors for permanent emigration, which fluctuated over time according to war and political environment. Exploration of possibilities of relocation to other continents followed the first drive to North Africa. In Africa and Asia, settled societies with a tradition of war and metal weaponry managed on the whole to keep the Portuguese and other Europeans at bay during most part of the early modern period. In the New World, the diffusion of lethal diseases among populations without immunity complemented the violence of war; it is estimated that more than 80% of the pre-Colombian population died in this way (Newson 2005). Successive wars to secure enclaves and their hinterland brought early colonial violence to Africa. The goal was to guarantee a permanent source of slaves, and increased demand had an impact on the traditional internal slave trade in Africa. With the transport of 12.5 million slaves to the Americas from the early sixteenth century to the mid-nineteenth century, demographic stagnation was the result of Portuguese and European presence (Eltis 2001). In Asia, the main impact of the Portuguese presence was temporary control of maritime trade in the sixteenth century, followed by an effort, shared later by Dutch and English traders, to monopolise markets and obtain privileged access to spices.

The creation of colonial societies from scratch in the Americas, with continuous tightening of the European control of land and a massive import of African slaves over the early modern period, defined new social hierarchies. The contrast between free and slave people became structural, while manumission in the Portuguese (and Spanish) empire contributed to create a buffer between the two categories, a buffer that was fed by constant miscegenation between Iberians, indigenous and Africans (Klein & Luna 2010). Most

indigenous populations remained relatively marginalised in the case of Brazil, while in Spanish America the tradition of settled populations allowed a certain level of integration with discrimination in the lower ranks of colonial society. The situation in Asia was much more complex, due to the prevalence of settled societies. European enclaves resulted from conquest followed by negotiation with established local settlements over which a layer of colonial rule was superimposed. In the Portuguese case, the way Goa was reshaped as a Catholic city was not replicated in other cities simply because the conquerors did not wield sufficient power (Xavier 2008). Co-existence between different ethnicities and religions under colonial rule became the norm outside the main centres, while indirect rule at local level was common practice. Interaction between colonisers and colonised took place at all levels (Xavier and Silva 2016). It is important to understand how the Portuguese empire was developed and kept together, but also how colonial violence shaped normative pluralism in different contexts.

Although the Portuguese empire started in North Africa as a failed extension of the re-conquest in Iberia, the subsequent expansion to sub-Saharan Africa, Asia and the Americas was based on the creation of enclaves and small territories in different parts of the world with significant distances from each other (Thomaz 1994). These discontinuous territories were kept together by permanent contact between merchants and their correspondents, horizontal transfer and adaptation of common institutions, assimilation and hybridisation of local institutions. The empire evolved over time and space: from the 1530s to the 1730s, coastal land between Bombay and Damaon was acquired through military pressure and negotiation; between the 1590s and the 1630s most part of Sri Lanka was brought under Portuguese control; in Brazil, territories were increasingly integrated following the discovery of gold in the hinterland at the end of the seventeenth century; but the conquest of the hinterland in Angola and Mozambique was only triggered by the colonialist scramble for Africa in the late nineteenth century. In the seventeenth century, colonial conflict between Portuguese and Dutch ended up with Portuguese losses in the Indian Ocean and resistance in the Atlantic, reflecting different realities in the organisation of and emigration to, the two areas, while indigenous military capacity kept the Portuguese in Africa and Asia in check. Thus, during the early modern period, the Portuguese empire may be defined by variable geometry with losses in one area compensated by gains in others (Bethencourt & Chaudhuri 1998-1999). This capacity of resistance and transfer required a flexible set of institutions on the ground, but also some common level of interests and policies.

This bottom up approach requires clarification of two contrasting components: participation by the indigenous population; and the role of the state. Portuguese emigration was overwhelmingly male, particularly to India and Africa, but also to Brazil. New Christians of Jewish origin, forced to convert to Catholicism in Iberia, were forbidden to emigrate in some periods; but they had an important presence in all parts of the empire from the end of the fifteenth century to the early eighteenth century. The involvement of indigenous populations was obvious from the earliest period, with local alliances and extensive miscegenation, the latter explicitly transformed into local policy to provide the Portuguese presence with roots, as exemplified by the ordinances of Afonso de Albuquerque, governor of the *Estado da Índia*, in the face of opposition from other noblemen and the opinion of King Manuel. The policy of purity of blood extended from Portugal in the last decades of the sixteenth century onto the empire, meant the exclusion of New Christians and people of mixed race from municipal councils and *misericórdias* (confraternities sponsored by the king), but was on the whole a construction that was only weakly reflected in daily life. The Portuguese king ended up accepting mixed race people in these Portuguese institutions of the Atlantic, although the fiction of blood purity persisted in the Portuguese settlements in Asia. The involvement of Christianised local people as vassals of the king defined the Portuguese empire in some surprising ways, as we will see later.

The second clarification concerns the crucial notion of the state. Part of Portuguese historiography about the early modern period accepts a vision of the state as weak, while at the same time considering it (implicitly) as the central government (Hespanha 1993). This is a reduced vision of the state as detached from society. The critique to the traditional historiography, which had projected onto the past a centralised vision of the state, has therefore been incomplete. I envisage the Portuguese early modern state neither as weak, nor as central or centralized. A reflection about the state based both on renaissance texts and modern developments is crucial. Giovanni Botero's notion of the state as a firm dominion over territory and people is an essential starting point, although modern notions of a monopoly of violence, mechanisms of conflict control, and interdependence among social groups help us to understand the early modern state (Botero 2009; Weber 1979; Luhmann 1979; Elias 2010). In my view, central institutions, including different levels of government, courts (civil and religious), houses of trade, customs, militias, the army (in its modalities of varied duration), the Church, municipal councils, guilds, colleges and confraternities all contributed to, and constituted part of, the early modern state (Bethencourt 2021). This

structural view takes account of the interests of individuals and groups, since their agencies influenced and contributed to developing and shaping the state.

This essay explores the relationship between institutionalised, bottom-up state building and the miscegenated societies it brought into being. In other words, it looks at how economic diversity stimulated expansion and contributed to the creation and reproduction of an empire; and at the ways in which political, social, ethnic (or racial) diversity constituted a threat to that empire. What were the mechanisms put in place to manage these contradictory forces of diversity? We shall proceed through three main areas of inquiry: trade, politics and religion.

Trade

The Atlantic islands (Madeira, Azores, Cape Verde and São Tomé) played an important role as a stepping stone to the colonial system, with territorial concessions by the king that led to further concessions and the creation of a hierarchy of land ownership over time. The introduction of sugar cane to Madeira was very successful in the last decades of the fifteenth and early decades of the sixteenth century, and was followed by its introduction to the island of São Tomé in the Gulf of Guinea and later to Brazil (Schwartz 1985). The plantation system developed in the Mediterranean became the new Atlantic model of land cultivated by intensive enslaved labour, with that labour traded from Africa to the Americas. The traditional system of seigniorial domains coexisted with large plantations but also with smaller-scale production of pastel (a dye plant), cereals and cattle breeding in Azores, sugar and then wine production in Madeira, ports of call in Cape Verde, Madeira and Azores which supported navigation. These economies were permeated by slavery and embedded in intercontinental trade from the very beginning.

The episode of Vasco da Gama's arrival in South Asia in 1498 with commodities unsuitable for the local market is well known. It reveals poor information-gathering prior to the first maritime expedition that circumnavigated Africa to reach the Asian markets. This embarrassing mistake was fast corrected: the Portuguese understood that nothing less than precious metals would allow them to buy spices and other commodities coveted in Europe, particularly textiles, tapestries, and precious stones, later porcelain, furniture, and sealing-wax. Purchases made with silver from Central Europe were followed by purchases with silver from the New World, while gold from West Africa also played a role in this vast process of exchange (Godinho 1981-1983). The Portuguese presence in Mina since 1482, and in Seville

and Spanish America since 1492, had much to do with access to precious metals, although this commodity did not monopolise a diversified trade and local investment.

The early commercial blunder in Calicut motivated the gathering of better intelligence: in 1515, Tomé Pires and Duarte Barbosa, independently, wrote important surveys of the commodities and markets around the Indian Ocean. They were also interested in political regimes and religious allegiances, since trade had always been dependent on local conditions and legal frameworks. Although these two agents were members of King Manuel's bureaucracy in Asia, they benefitted from the growing presence of Portuguese in Asian interregional trade, as well as foreign merchants travelling with or investing in the *carreira da Índia*, who simultaneously provided and required better information. In the 1510s, the Portuguese reached China; in the early 1540s they were already trading with Japan; in the 1550s they obtained authorisation for a settlement in Macau. In the meantime, there was a permanent flow of Portuguese attracted by other possibilities outside the formal empire in the Bay of Bengal, Southeast Asia, and the Persian Gulf. Small communities developed, making different arrangements with local authorities and benefiting from the relatively open trade practices of the main ports. Commercial opportunities were enhanced by temporary partnerships with local traders, who also offered access to capital. Parsi bankers played a significant role in the activities of Portuguese, and later Dutch and English traders.

The Portuguese aim of sourcing a wide range of commodities from around the world created a diversity of matrimonial alliances, due to the very low rate of female emigration. Having a claim of Portuguese descent became a form of distinction in distant environment. Such a lineage served as an identifier among loose communities with common interests that could benefit from some kind of association with, and protection by, longer established communities and polities. Mobilisation of other communities of Portuguese descent in case of local reverses of fortune became a strategy that might ensure increased physical security and economic predictability. Local institutions, such as the *misericórdias*, operated inside and outside the Portuguese empire to execute wills, recover investment, and guarantee funerals. These confraternities could extend their activities to finance the needs of local and inter-regional government, such as the viceroy of the *Estado da Índia* in Goa, or the captains of forts and ships (Sá 1997).

Maritime long-distance trade was supported by royal trading posts in Africa and in Asia, as well as central institutions in Lisbon responsible for contracts on the buying and selling of spices, warehousing and distribution of commodities, or the resolution of trade conflicts. The *carreira da Índia*, the fleet annually sent on a voyage from Lisbon to South Asia,

was organised by the *Casa da Índia*, which was controlled by the government; but the whole operation was based on private contracts for ship building, ship renting, and freights. Royal monopolies were relatively limited, based on concessions of specific commodities under private contract, such as brazil-wood, from which a dye highly appreciated in Europe was derived, and which gave the name to the colony, pepper from South Asia from 1506 to 1570, or slave trade in the Atlantic. The Portuguese king reserved for himself the right to export silver and copper, and he extended his privilege of trade in Chinese silk to some of his subjects in specific periods. He also controlled the concession of travel privileges for Asian routes. However, the majority of Asian commodities were not under royal monopoly, as a degree of trade became accepted as a supplement to wages for everyone from the viceroy to sailors on Portuguese ships. Many traders benefitted from royal contracts due to the common practice of subcontract. This system meant that virtually all Portuguese emigrants and their relatives could be legally involved in trade, contrary to what occurred with the Dutch East India Company (VOC), in which personal gain outside labour contracts was firmly excluded (Antunes and Gommans 2015).

In the Atlantic, trade was organised in a more liberal way: there was no equivalent to the *carreira da Índia* until the mid-seventeenth century, when the state sponsored the *Companhia do Comércio do Brasil*, which involved the creation of a convoy system. However, this did not last long after the expulsion of the Dutch from northern Brazil in 1654 (Costa 2002). Chartered Companies only entered the Portuguese Atlantic again in the 1750s, when the companies of *Grão Pará e Maranhão* and *Pernambuco e Paraíba* were established (Carreira 1983). However, the transport system was, in general, in private hands. The slave trade was the subject of royal contract during the Iberian Union of Crowns (1580-1640), both as regarded the trade from Africa (Portuguese *contrato*) and for the import of slaves into Spanish America (Spanish *asiento de negros*). Participants in the *contrato* and the *asiento* were often the same people or were part of the same network. Nevertheless, subcontracting and licensing within the *contrato* and the *asiento* involved a significant number of merchants (Alencastro 2018). One of the main commodities from Brazil in the early modern period, sugar, which involved a significant group of landowners and merchants, often with aligned interests, was never under royal monopoly. The tobacco trade and taxation became regulated by royal contract, but production was free of state intervention. In this case, trade, transformation and distribution involved a significant number of subcontractors and local agents (Luxán 2014). Gold was also privately produced and subject to the normal taxation of 20%, plus 1%

for protection costs, with the king imposing royal protection and legal obligations, but exploration and trade being left in private hands.

The impact of trade on diversity is significant, since the colonial pact guaranteed compartmentalised economic interests between regions while the centre (Portugal) maintained for itself the privileges of import and re-export into European markets. The system started to breakdown in the last decades of the seventeenth century, which saw a transfer of plants from South and Southeast Asia into northern Brazil, while the *Carreira da Índia* began calling at Brazilian ports on the way back to Lisbon under pretext of naval repairs (Lapa 1968). Direct trade also developed between the different regions of the empire with the dissemination of plants and investment in new plantations, a development later responsible for the cotton boom in northern Brazil. This bypassing of the centrality of Lisbon reflected shifts in relations of economic power, the emergence of new markets and an increased importance for Brazil, partly fuelled by the gold rush in the eighteenth century (Alexandre 1993).

These developments in trade underpinned a relative flexibility in the Portuguese model of empire, a flexibility that allowed migration and local investment to shift from one region to the other. Defeat by the Dutch in the East reflected the weaker human resources available to the seventeenth century *Estado da Índia*, while victory in the Atlantic resulted from massive emigration. There was thus an organic component of the empire derived from shared interests among the colonists. It is true that the Dutch left a divide between property owners and traders in Recife; but this was healed in time through marriage alliances between creditors and debtors (Mello 1995). The big divide, as we will see later, was between colonists and slaves, while indigenous people in Asia and Africa, co-opted through marriage, played a crucial role as mediators with local societies.

Foreign traders complete this picture. Indigenous agents saw the opportunities opened up by the Portuguese empire locally, and went into partnerships with, and/or lent money to Portuguese traders, in many cases intervening directly in contracts with the state, mainly in the seventeenth and eighteenth century *Estado da Índia*. Contracts for the rent on tobacco in Goa were generally taken by non-Christian indigenous merchants, who showed their financial importance in a period of relative withdrawal of Portuguese traders, who were more interested in investment in precious stones. Tax farming was another area in which indigenous traders invested, making them simultaneously subjects of the King and enforcers of the empire. Diversity here resulted in further links with local society, even if religious

policy in Goa—, which only changed during the government of the Marquis of Pombal (1750-77)—did not favour full integration of non-Christian traders.

Agents from other European countries were theoretically excluded from the Portuguese empire, but they participated in the first commercial expeditions to South Asia, were party to contracts for the royal trade on pepper, and offered their ships for freights, as happened with the Dutch in the Atlantic and the English in the Indian Ocean as the *carreira da Índia* began to decline. Dutch, German, Italian and then English ships largely controlled trade between Portuguese ports and northern Europe or the Mediterranean. Foreign merchants benefited from special privileges accorded in Lisbon to attract capital and guarantee distribution of overseas products in the European markets. Some of them also managed to travel to the Portuguese colonies either as merchants or as assistants to dignitaries, as in the case of Jan Huygen van Linschoten, who was an assistant to the archbishop of Goa, Vicente da Fonseca (1583-1586). While many worked as associate members of commercial firms in Italy, Germany, Netherlands, France or England, but left once they had fulfilled their contracts, others created their own firms and ended up marrying into Portuguese commercial families (Labourdette 1988; Shaw, 1998; Alessandrini 2012, Poettering 2018). The importance of foreign traders grew in time with the exclusion of New Christians: for example, Dutch firms became involved in contracts for trading tobacco and diamonds from Brazil (Miranda 2019; Vanneste 2015).

To sum up, trade produced connections across continents and benefits for many people, but also sharp inequality, represented by the trans-Atlantic slave trade, in which the Portuguese were responsible for the transport of circa five million slaves from the 1440s to the 1860s, and the creation of a slave-based society in Brazil, sustained by structural colonial violence. Portuguese merchants in the colonies could obtain a high social status; but there was a significant range of statuses, from financier to shopkeeper and pedlar. Indigenous investors and merchants played an important role in the seventeenth- and eighteenth-century *Estado da Índia*, although exclusionary religious rules in Goa encouraged migration until a reversal of these policies was imposed by Pombal in mid-eighteenth century. In Africa, indigenous and mixed-race lineages of slave traders played a crucial role in the infamous trade from the hinterland to the coast, while in Brazil street sellers were largely composed of slaves and freed people. The fact that virtually all Portuguese colonists could be involved in trade created a dynamic of shared interests that allowed a certain level of relations between different social groups, particularly landowners and merchants, although poor colonists could lead a life of strict social dependency close to indentured status. Finally, trade created

conditions for the exchange of information and knowledge alongside commodities, the dissemination of plants and shifts of investments from one region to the other.

Politics

The diversity of populations in the Portuguese empire was basically managed by the conversion of indigenous peoples to Christianity. This issue will be more fully discussed in the following section on religion, since it implied both persuasion of, and constraints on, populations living in the Portuguese territories, even if in many cases local allegiances proved strongest. A policy of forced conversion for all slaves affected millions of people transported across the Atlantic to Iberian America. The reduction of diversity through conversion defined the specificity of the Iberian empires before the northern European expansion; the latter's Protestantism required that believers had direct access to the Bible and superficial conversion without (or with very little) religious education was not an option.

This policy of conversion was a response to papal endorsement of the Iberian expansion, but it also had the purpose of obtaining alliances with indigenous peoples and solidarity for the Portuguese presence. This policy carried with it obligations that had significant consequences: all Catholics within territories controlled by the Portuguese were considered subjects or vassals of the king (vassal was first a landlord but the two nouns became synonym in time: Bluteau 1721, VIII 372), while non-Catholic populations had to comply to Portuguese rules without the rights accorded to recognised vassals. Many converts were promoted to the municipal elite through marriage, assuming Portuguese descent as the main aspect of their identity; but this integration was never straightforward, due to the rules of purity of blood. Regional differences emerged; the assumption of Portuguese descent in the Indian Ocean contrasted with the open acceptance of mixed race people in the Atlantic.

The status of all Christians as vassals of the king—with the ambiguous exception of foreign European traders, who might either be placed under strict rules or enjoy a privileged status in Portugal—, constituted a significant tool for the reduction of diversity. Rules of purity of blood applied both to indigenous and to mixed-race people concerning access to priesthood, religious and military orders, although there were exceptions (Figueiroa-Rego 2011). Fictions of pure descent developed in Asia, but also in Brazil, in a process similar to that occurring in Iberia itself. Daily negotiation of status defined precarious identities all over the empire. Unstable identities and a degree of negotiable outcomes of blood enquiries allowed a certain, albeit fragile, sense of allegiance and loyalty. Even if the empire opened up

alternative behavioural paths at all levels of society, enforcing institutions, particularly the Inquisition, imposed harsh control in some important hubs. The continuous movement of Portuguese towards areas outside the formal empire in West Africa and Asia reveals the limits to political and religious control enabled by colonial institutions.

Slaves, generally defined as property, represented a surprisingly complex group: as Christians they had access to confraternities, they could use their status to plead against violent treatment by owners, they could mobilise funds to negotiate emancipation, and even appeal to the king concerning instances of extreme unfairness or abuse. The fact is that the king complied on numerous occasions, responding positively to the requests for help against ill treatment made by slaves and manumitted people. Such acts of grace, as they were called, were pronounced *ad hominem*, individually, case by case (Russell-Wood 2000). They did not change the system of slavery, similar to that of the English, Dutch or Spanish systems in the Atlantic; but they allowed a certain degree of direct relationship between the king and individual slaves. In these cases, the humanity of the slave was recognised.

Royal grace was a minor issue in a colonial society organized through the plantation system, as in the case of Brazil, where the major part of the population consisted of slaves. White colonists were a minority who needed to use mixed-race people as social mediators. The relative openness of the King to accepting appeals by slaves was matched by the significant number of manumissions granted by plantation and *engenho* owners in Brazil. These manumissions privileged illegitimate children born to enslaved women, and women over men; they built a "buffer" between white colonists and enslaved Black population, socially promoting mixed-race groups. Manumission in the Portuguese empire was significantly more important than in the other European empires; it contrasted with the English empire in North America, in which manumission was virtually impossible during the eighteenth century.

Portuguese Kings tried to assert their position through concessions of land in the uninhabited Atlantic islands but also in Brazil, ignoring the semi-sedentary indigenous groups there. They appointed captains to take control of forts conquered in North Africa (mostly abandoned in 1542-1550 after defeat), captains and pilots for ships and fleets (an arrangement often ignored but important due to the number of people involved), viceroys or governors for the *Estado da Índia* and Brazil, and judges for the court of appeal (*Relação*) in Goa and Bahia. Appointments were privileges bestowed by the king to create a system (and economy) of service that reinforced ties of loyalty. The royal assertion of power as the vortex of a relatively loose system was exercised through appointments, rather than by the

permanent management of decision making, although instructions were issued and inspections implemented. Consultations to the royal councils in Lisbon (or in Madrid during the period of the Iberian Union of Crowns) were regular, although their efficiency was questionable. The King could intervene on personal appeals from all levels of the administration or even respond to vassals with local grievances.

The issue here is not only the different levels of royal appointments, which entailed a certain level of loyalty and homogenization of procedures, but also the creation of an imperial elite that moved from one colony to another, carrying with it knowledge, experience, procedures and cultural frameworks (Souza 2006). Other institutions, however, significantly shaped daily life. Municipalities and confraternities were rightly considered by Charles Boxer as the two pillars of the Portuguese empire (Boxer 1965). These forms of representation of local elites revealed different social configurations according to location. Municipalities had an enormous political power, from Goa to Macau (where the municipal council acted autonomously until the royal appointment of a captain in the 1620s), or from Luanda to Salvador da Bahia, defining local policies and even negotiating alliances with neighbouring polities. Confraternities integrated specific social and professional groups, including slaves and manumitted, although the particular case of the *misericórdias* served as a means for integration and dual representation (of noblemen and plebeians). These bodies acquired an enormous financial capacity due to donations, the management of investment, and the execution of wills, which often involved the transfer of capital between different parts of the empire.

Municipalities and confraternities played a crucial role in keeping the empire together in the long run. They involved the elites, including promoted mixed-race people, as well as artisans in the larger towns like Salvador da Bahia (Brazil). The balance between rural and urban environments varied from region to region. For example, territorial enlargement in Brazil had increased dramatically with the extraction of gold in the interior by the end of the seventeenth century, and there was a surge in new towns, markets, and communication systems. The development of colonial society made new demands on agricultural crops and cattle breeding, followed by the exploration of northern and southern Brazil, regions that had been traditionally been linked to the Spanish empire through smuggling. Social diversity and social inequality grew accordingly, while the new centrality of Brazil in the colonial system meant that the country was able to absorb centrifugal tensions for most of the eighteenth century.

The situation in the Atlantic islands became relatively stable in the seventeenth and eighteenth century with the ports of call in Madeira and Azores playing a role in the intercontinental transport system, supported by local agricultural outputs. In the South Atlantic, the plantation complex in São Tomé maintained a profitable level of production, drawing on slave labour from Central West Africa, in spite of revolts by slaves suffering from a sense of uprootedness and poor living conditions. The islands of Cape Verde kept their role of ports of call and support for the slave trade from West Africa, and were populated by a growing number of mixed-race people. On the mainland, the Portuguese established close relationship between their settlements and indigenous powers; the diffusion of Luso-African lineages became important inside and outside those settlements and in virtually all the main ports of the Gulf of Guinea (Guarda 2016). The same can be said about Central West Africa, in which the central position of Luanda as the main port for slave trade was maintained by a network of African brokers linked to Luso-Brazilian-African lineages. However, in the last decades of the seventeenth century political interference in the hinterland became more visible, and the “africanisation” of the Portuguese in this area at this time was the consequence of an overwhelming indigenous society surrounding the colonial settlements (Thornton 2020).

The appropriation and adaptation of local legal frameworks was one of the strategies of the empire. Until the First Opium War (1839-42), the ambiguous status of Macau as a tolerated settlement relied on the continuing rule of local law and the autonomy of the Chinese community *vis-à-vis* Portuguese rule. In other settlements outside the formal Portuguese empire, such as Nagasaki (Japan), the local ruler reached an agreement with the Jesuits on the management of the Portuguese community. In the Northern Province (South Asia), one of the few continuous territories secured by the Portuguese, local property rights were modified to favour Portuguese landowners, who were responsible for military recruitment in case of war. In Sri Lanka, in drawing up an inventory of local property (*Tombo*) for most of the island, the Portuguese identified problems of legitimacy and succession without directly confronting traditional local rights. The inventory was used for fiscal purposes, but also as an instrument to impose political loyalty, reshape social hierarchies and obtain the insertion of Portuguese institutions. Particularly complex was the situation of the *prazos* (concession of land) in Zambezi valley, Mozambique, a hybrid system between African and Portuguese norms, in which matrilineal succession for three generations guaranteed a regular Luso-African presence in the region, including in some territories obtained from the chieftaincies of the Monomotapa confederation. In West and Central West Africa, the Luso-

Africans were largely subject to local custom law. Only Brazil can be considered to be shaped, to a certain degree, by Portuguese law, although local arrangements with semi-settled and nomadic indigenous groups, mainly at the very beginning of the colonisation, were later complicated by the creation of indigenous villages by the Jesuits and absorbed by Pombal's legislation after the missionaries' expulsion. However, a slave-based society which used forced labour transported from Africa became difficult to articulate with local indigenous communities. Therefore, an arguably new set of permanent negotiations and mediation ensued to manage the particularities of Brazilian society (Serrão et al 2015).

Diplomacy completes the framing of diversity, since Portuguese authorities tried to obtain advantages from a double policy of combining military threat with commercial and political gains. Several settlements in South Asia were not directly conquered, but were obtained by playing on local divisions and holding out offers of military assistance. Diplomacy targeted weak local rulers, like King Dharmapala Peria Bandara (c. 1541-1597) of Kotte, Sri Lanka, who converted to Christianity and legated his territories to the Portuguese king (Strathern 2007). Such policy was tried in different places in Asia, following up early experiences in Africa, where there had been successive attempts to establish bridges with what is now Senegal and the kingdom of Benin, until the King of Kongo saw an advantage in accepting an alliance with the Portuguese. Christianisation of the king and local elite followed, with the regular presence of Portuguese missionaries at the royal court; and the king was treated initially as equal by the Portuguese king, who sponsored the education of young Kongolese at the university of Coimbra. The establishment of Luanda in 1576 at the periphery of the kingdom of Kongo resulted from this arrangement, although politically, ethnically and culturally Luanda remained mostly African until the late nineteenth century.

To sum up, colonial building was very much a bottom up process, in which migration, violence, local alliances, intermarriage and indigenous agency each played a crucial role. Royal policies followed settlement, and European institutions were adapted to overseas realities in competition with local normative configurations, mainly in Africa and Asia. Overstretched and fragmentary territories across four continents were held together through flexible institutions, such as municipalities and confraternities, while governors and captains created a certain level of political and cultural homogenization at the top. Social inequality reached its heights in the Atlantic with slave trade and a colonial society based on slavery created from scratch in Brazil, while social diversity was more significant in Asia, due to previous local complexity and limited Portuguese impact. The importance of Luso-Africans

and Luso-Asians cannot be sufficiently underlined, since they provided bridges and created hybrid structures, including mixed lineages, that perpetuated empire. Managing diversity, from a political point of view, meant local improvisation, adaptation, varying degrees of flexibility, and the light, central hand of the King, who proceeded through appointments, rewards, acts of grace and pardons.

Religion

Christian vassals as compared with non-believers, free people as compared with slaves, and Portuguese descendants taking precedent over indigenous others were the three main, polarised, pairings of political and social status in the empire. Gender division was also pervasive, with differentiated roles assigned to men and women, and different behaviours assigned to men and women in public and private spheres, although the rules of inheritance were relatively equitable among the Portuguese. Homosexual and queer behaviour was penalised but there is evidence of a significant amount of alternative sexual behaviour (Bethencourt 2021a). Claims to aristocratic descent played an important role for those in distant lands to assert distinction; there are well known picturesque episodes of Portuguese detainees in Chinese prisons fighting each other over pretensions to superior birth, which only reinforced local perceptions of these men as barbarians. The traditional opposition between noble clean hands and hands dirtied by manual work was also transferred to the empire, reinforced by the supreme value attached to war, an endeavour supposedly always led by those with clean hands (Carvalho Murteira Jesus 2021). An opposition between legitimate and illegitimate birth resulted from the assertion of marriage as a Christian sacrament during the Middle Ages. Legitimising children out of wedlock was a common practice among kings and nobles, popes, cardinals and bishops, but illegitimacy was still a major source of social divide. The valuing of birth as a structural element in a hierarchical, seigniorial society found its way into colonial society, although false claims there were naturally more widespread than in the metropolis.

The manipulation of religion to assert social and ethnic hierarchy played a major role in medieval Hispania, having been reintroduced in the supposedly homogeneous Christianity of these Iberian kingdoms, following forced conversion of Jews and Muslims and the introduction of the statutes of purity of blood (Figueiroa-Rego 2011). The extension of these statutes to the Iberian empires not only placed descendants of converted Jews and Muslims below self-proclaimed Old Christians, but it also assigned a low status to converted Africans

and Asians. Extensive inter-marriage in the empire among Christian Portuguese and indigenous people did elevate the status of locals as Christians; but their integration into social elites depended on wealth, political negotiation and local conditions, particularly in Asia, to produce faked lineages of pure descent.

Transfer to converted people and their descendants of traditional competition towards Jews and Muslims extended the arbitrary quality of the purity of blood rules. Moriscos were virtually absent from the colonial world, but the participation of New Christians of Jewish descent was visible from the very beginning as traders and as sugar plantation and *engenho* owners in Brazil (Novinsky 2002). These New Christians could become extremely wealthy; but they were placed in a permanently vulnerable position, exposed to denunciation by neighbours and friends. Some of them crossed the barrier of purity of blood through bribery, or through integration into Old Christian lineages by simply assuming a status of pure blood; but new enquiries could disrupt an apparent security of status. The more interesting side of this inherently relational manipulation of prejudices to assert social hierarchies is that black people could claim that they had a higher religious status than New Christians. The argument was simply that they had not refused Jesus Christ: they were just ignorant pagans, open to the revelation.

In practice, indigenous converted to Christianity were not allowed to join religious orders until the second half of the eighteenth century, and this late access occurred only due to the intervention of the government of Pombal. In Japan and China, indigenous people could take the first steps on the road to becoming Jesuits. In India, they could become priests but had their access to religious orders blocked after an initial openness. Those who decided to go to Rome to obtain the position they felt entitled, as happened with the bishop Mateus de Castro in the seventeenth century, were systematically derided and discriminated against by the clergymen of European origin. In Africa, the early promotion of the Christianised Kongolese King Afonso's son Henrique, to the bishopric of Utica, in 1518, was a sole example of such promotion until the twentieth century. In the kingdom of Kongo, indigenous people were ordained as clergymen, but they did not have access to religious orders. In Brazil, clergymen of European origin entirely controlled the structure of the Church (Boxer 1963 Boxer 1978, Paiva 2006).

The integration of Christianised populations in different parts of the Portuguese empire was obtained through confraternities, which played a major role among professional groups, slaves and the manumitted. Local clergymen had an important role as mediators to indigenous communities in South Asia. Missionaries under the royal patronage (Church

patronage was delegated by the pope to the Portuguese king in the areas of expansion) spread Christianity outside the Portuguese empire, mainly in Japan and in China. The success with which Christianity was spread in Japan was probably the cause of the political backlash after the unification of Japan under the rule of Tokugawa Ieyasu in 1603. Successive conflicts were attenuated by diplomatic missions by the Jesuits and the intervention of local *daimyo* (feudal lords), but this did not prevent the final expulsion of the missionaries and the Portuguese in 1639 (Boxer 1993). However, these experiments tested a different level of diversity outside the boundaries of the Portuguese empire. In those environments, beyond the reach of direct political intervention, conversion needed to proceed by persuasion, not constraint, against the background of an alien system of values.

The assertion of a monopoly on religious activity by the Portuguese and their Italian and Spanish colleagues working under the Portuguese royal patronage puzzled the Congregation of *Propaganda Fide* in Rome, whose first secretary Francesco Ingoli, heavily criticised the Portuguese missionaries for blocking access to indigenous people, and he explicitly criticised them for greed. For example, Ingoli suggested that there were no missions in Madagascar because there was no wealth to be gained there (Ingoli 1999). The work of contemporary writers who were not Portuguese offers different perspectives, with insight into the real dimensions of social conflicts and the dynamics of competition for resources. Such writing often suggests that diversity was not a given, but rather produced through conflict and strategies for the monopolisation of resources. Janus-faced religion was responsible both for an assimilation of, and a division between believers and non-believers, and for a division between those eligible for ecclesiastic careers and those ineligible, thus creating new layers of defining hierarchies and contributing simultaneously to a reduction and an increase in diversity.

Conclusions

Managing supposes executive control or authority, while management is defined by the "application of skill or care in the manipulation, use, treatment, or control of things or persons (...) the administration of an organization or commercial enterprise (...) the use of contrivance, prudence, ingenuity, or deceit or trickery for effecting some purpose" (Short Oxford English Dictionary: 1686). In the English language, management was in use in the late sixteenth century, managing by the early eighteenth century. Such activity is conceived, in general, in top down terms, although the words can be applied to horizontal resolution of

conflicts. Diversity means "the condition or quality of being diverse, different or varied (...) a distinction; a different kind (...) contrariety to what is agreeable, good, or right; perversity, evil, mischief" (Soed, 720). The last meaning is very interesting for our analysis, because it tells us that what is diverse is sometimes perceived as disagreeable, perverse even. But the main risk of using diversity and diverse is that it can imply a given and rooted difference, in other words, that difference is a natural situation. As we have seen, diversity in the Portuguese empire was not innate, but rather produced: and, with it, intersectional scales of inequality arose.

It is the production of diversity that is at stake here and, in many cases, the noun diversity is used to hide the straightforward production of social inequality. The classification and racialisation of the peoples of the world resulted from the European expansion. The transformation of the variety of human beings into races as early as the sixteenth century, as indicated by the title page of Abraham Ortelius, *Theatrum Orbis Terrarum* (1570), became a matrix for the theories of race that developed in the eighteenth and nineteenth century, based on a hierarchy of continents and a corresponding aggregation of types. These theories of race were a sub-product of racism, since they justified the imposition of a hierarchy in the new international ordering of labour that resulted from European expansion and colonial violence. These theories of race were also used, at a local level, to exclude competitors and justify the monopolisation of resources. The Iberian experience contributed to theories of race at two levels: the transfer of the pejorative designation *preto* (negro, sic) from Africans to indigenous peoples of Asia and the New World, a label that automatically designated them as inferior; and discrimination against converted Jews and Muslims through the statutes of purity of blood (Bethencourt 2013). Diversity was thus both reduced and extended, creating a hierarchy between continents, while the introduction of a pure/impure axis in Iberia and the Iberian empires racialized ethnic groups and reinforced social inequality. Colonial violence is the background to theories of race, a material setting that was spread from the beginning of the Portuguese and European expansions in the fifteenth and sixteenth centuries. This violence against other peoples of the world increased significantly during the nineteenth and early twentieth century with the effective occupation of colonies in Africa and Asia and the extraordinary enlargement of the world areas controlled by the Western powers until the resistance of local populations led to the emancipatory movements and the processes of independence.

The dynamics of interdependence among agents and social groups may have reduced inequality of status due to the levelling field of contracts; but the rules of purity of blood

deepened the gap between ethnicities. Evangelisation transformed indigenous peoples and baptised slaves into vassals of the king, which reduced the gap between colonists and colonised, allowing even slaves to appeal to the king; but levels of integration and discrimination depended on permanent local negotiation. Intermarriage in the Portuguese empire also contributed to reduce diversity between ethnicities, although the acceptance of mixed-race people among elites depended on local conditions. Finally, the manipulation of religion to assert purity of blood as a social criterion defined an internal divide in Iberian societies and their empires until the eighteenth century, while the monopolisation of resources by European clergymen and missionaries largely blocked the access to religious orders of evangelised indigenous people.

Religion and legal systems were arguably the two main legacies of the colonial period. A society of mixed-race people emerged in Brazil with all the attendant problems of social inequality that needed to be addressed. Affirmative action has been implemented in the past decades with good results, but there is a long way to go. In Mozambique, the mixed lineages of the Zambezi valley have virtually disappeared in an African environment. In Goa, the number of people able to speak Portuguese was always weak, as the report of Orlando Ribeiro in 1956 attested. In Luanda, by contrast, a resilient mixed-race elite emerged, as Patrick Chabal pointed out; and it is from this group that characters in some Pepetela's novels were drawn (Chabal & Vidal 2007). The consequences of colonialism are still felt today in most part of the globe. Decolonisation is a process that continues long after declarations of independence, and new independent countries struggle to cope with this. Former European colonial powers are not immune to problems in this postcolonial period, since they benefitted from the accumulation of capital produced by the colonies. The integration of immigrants from former colonies is problematic due to persistent racism and discrimination in the labour market; and the restitution of artefacts illegally acquired from colonies by museums and private bodies, and reclaimed by the newly independent countries, is far from being sorted out. Portugal is part of this constantly developing process of self-decolonisation. The problems indicated here must be addressed by Portugal both as a country and as a part of the European Union.

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Received for publication: 18 July 2021

Accepted in revised form: 19 September 2021

Recebido para publicação: 18 de Julho de 2021

Aceite após revisão: 19 de Setembro de 2021