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SPECIAL ISSUE

IDENTITIES IN THE LUSOPHONE WORLD



SPECIAL ISSUE EDITORS

ROBERT A. KENEDY
YORK UNIVERSITY

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Given the broad historical and analytical coverage of Portuguese Caribbean communities and their long-run history, in *PSR* vol. 28, no. 2, and given the April 2021 volcanic and geomorphological events on the Island of St Vincent (also affecting The Grenadines and with eruptive ash fallout as far the Bahamas and other Caribbean locations), the *PSR* dedicates this issue – with the permission and agreement of the Issue Editors – to the rank-and-file people of St Vincent and The Grenadines (the south-east Windward Islands zone of the Lesser Antilles), and to the people of all Caribbean islands affected in various ways by the volcanic activity and its consequences.

ABSTRACTS

Queen Leonor of Viseu, Corporate Kingship and the Centralization of Pious Institutions in Early Modern Portugal (1479-1521) (*Susannah Ferreira*)

Between December 1496 and October 1497, King Manuel I (1495-1521) issued legislation that both expelled all non-Christians from Portugal and impeded the emigration of the majority of Sephardic Jews. In consequence, tens of thousands of Jews – many of whom had recently migrated from Spain-- were forcibly converted to Christianity. The sudden suppression of Judaism triggered an immediate social crisis where thousands of Jewish families were separated from one another and deprived of their traditional networks of social assistance. This article examines the aftermath of this mass conversion and the strategies by which the Portuguese crown sought to integrate and assimilate the New Christians. These strategies included: the creation of *misericórdias* to dispense charity, the regulation of burials and the creation of centralized hospitals to manage orphans and displaced persons as well as legislation that prohibited marriage between New Christians. Historians have given scant attention to the experiences of New Christians in the four decades leading up to the establishment of the Inquisition. Part of the reason for this omission is attributable to the difficulty of identifying former Jews in the historical record. With baptism, their Jewish names and indications of their legal and fiscal status disappeared. However, records in the royal chancery point to some of the lived experiences of Portuguese New Christians in the early sixteenth century. In addition, this article draws on *regimentos*, writs and correspondence to examine how the Portuguese crown attempted to integrate and assimilate New Christians into mainstream society.

Historical Perspectives of the Portuguese in the Caribbean (*Joanne Collins-Gonsalves*)

This paper is an historical analysis of the Portuguese from Madeira, the Azores and Cape Verde Islands in the English-official Caribbean territories of Guyana, St. Vincent, Trinidad, Bermuda, St. Kitts, Grenada and Antigua from the nineteenth century. Grounded in the nineteenth century, this research includes contemporary references and builds on the existing scholarship on the Portuguese in the Caribbean. The paper is presented thematically with a focus on arrivals across the Caribbean, entrepreneurship, inter-country communication and travel, culture, religion, country statistics and historical gastronomical references. Lusophone connections are explored and assessed in a comparative context.

Edições dos manuscritos sobre os descobrimentos como fundamentos da identidade portuguesa oitocentista: o caso da *Crónica de Guiné* (*Alexsandro Menez*)

The present article seeks to show that the 1841 first edition of Gomes Eanes Zurara's *Crónica da Guiné* manuscript played a fundamental role in terms of asserting in European diplomatic circles the relevance and pan-European primacy of Portuguese oceanic voyages. The published manuscript was leveraged to justify the priority of Portuguese contacts with overseas territories within a tense European context characterized by increasing interest in various regions of Africa. The study supports the hypothesis that the first edition of the *Crónica de Guiné* served not only as one of the core signifiers of Portuguese identity within the country as such, through pinpointing a past shared by all Portuguese, but also outside the country, through prompting European powers to acknowledge a link between the modern Portuguese nationality and the

historical primacy of specific fifteenth- and sixteenth-century maritime voyages and discoveries.

A Statue of Guilt: Memory as a Painful Reminder in Caderno de Memórias Coloniais (Notebook of Colonial Memories) by Isabela Figueiredo (Ricardo Rato Rodrigues)

In the book *Caderno de Memórias Coloniais* (2010), Isabela Figueiredo writes about her memories of her early life in Mozambique. Born in Lourenço Marques (currently Maputo), she spent her first 13 years in Africa, living as a colonial subject of the Portuguese Empire. Like many others, due to the independence of Mozambique, she had to move to Portugal in 1975, leaving behind a complex identity, one full of pain and guilt. The book is an exploration of those memories, often painful and violent, permeated by the guilt of a white colonial, (unwitting) participant of brutal colonialism. This article explores how Figueiredo's biographical experiences have informed her writing and the formation of her "schizophrenic" identity, and how her work contributes to the better understanding of the issue of identity for displaced persons. The article also explores the process of formation of a personal (and collective) identity and how these are articulated in/by memory and postmemory (Hirsch). It focuses on the issues of identity formation in terms of the collective Portuguese post-colonial memory and on its particular and critical view which challenges nostalgia with its sharp and vivid language. Crucially, this paper also aims to assess the literary importance of Figueiredo's book in terms of not only its contribution to Portuguese post-colonial debate, but specifically, its value as a feminine perspective in what is mostly a male dominated topic in the specific case of the Portuguese literary sphere.

The Use of Languages as Tool to (re)Create Social and National Identities over Three Generations in Mozambique from 1975 to Modern Times (Xénia Venusta de Carvalho)

The relationship between language(s) and identities are described by three generations of Mozambicans, in Southern Africa, from 1975 to modern times. How are languages used to (re)create national and social identities in post-colonial Mozambique? Portuguese, the former colonial language, continues to be an identity marker of social and political dominant position in society, particularly in urban settings, giving access to political power and modernity, reinforcing race stereotypes. Conversely, national languages represent social and political resistance described by the 18 life histories collected over three generations, alongside with ethnographic fieldwork done in southern Mozambique. The three generations are divided within a specific historic and ideological setting (i.e., socialism, democracy, and neoliberalism). The periods are based upon the notion of generation understood as a space and time of identity and political construction, in which biography and history meet. In addition, a gender approach is also described with different identity outcomes and strategies.

Portuguese-Canadians as "Dark-Whites": Dynamics of Social Class, Ethnicity, and Racialization through Historical and Critical Analysis (Esra Ari)

This article explores the question of "whiteness" among Portuguese-Canadians. Portuguese-Canadians who immigrated mostly from Portugal, sometimes its former colonies such as Brazil, are automatically lumped under the "white" category because they have a European background. However, this article argues that whiteness is beyond an objective criterion such as the origin country of people. First, this article uses a historical and critical approach to provide

a background for the discussion of this study topic. It argues that even before Portugal's colonial empire collapsed, during the first half of the eighteenth century, the whiteness of Portuguese was questionable in the English-speaking world. Second, drawing from twenty interviews with Portuguese-Canadians in Toronto, this article argues that the cultural background and low socio-economic positions of Portuguese give shade to their whiteness. Overall, this paper will argue that whiteness of the Portuguese is not solely related to their skin color and their European origin. Any discussion on whiteness or lack of whiteness of the Portuguese is related as much to their socio-economic position and cultural background because hegemonic whiteness refers to "white-skinned," middle-class, Anglo-Saxon, Protestant and English speakers (Murguía and Forman, 2003). Accordingly, this paper prefers to use Harney's (1990) term, "dark-white," to address Portuguese living in the English-speaking world instead of "white" for the latter is not sufficiently nuanced. The claim here is that social class and culture can confer social color, which can, in turn, determine social standing. The theories and concepts guiding this work are racialization, whiteness studies, immigration, and capitalism and development.

Language of Non-belonging: Linguaging Race and Portuguese-speaking Youth Subjectivities in a Toronto High School (*David A. Pereira*)

Formal education plays a key role in consolidating national identity based on unified culture(s) and linguistic capacity that offer a path to national belonging. Portuguese-speaking students' (PSS) experiences in schools reveal a non-belonging in formal education. The paper draws on data from a 16-month ethnography in a Toronto high school with a large PSS population and uses raciolinguistics to understand the disciplinary practices targeting PSS and (re)producing a linguistically mediated non-belonging in education. PSS adapt several language strategies. Some resist the practices of surveillance and discipline. Others avoid speaking Portuguese altogether at school. These adaptive responses are not available to all PSS equally for reasons that gesture to race, class, and language. Participants' experiences reflect painful emotions that impact the social and cultural integration of some PSS at school. Critical language awareness offers potential strategies to raise understanding and empathy among school personnel for students' responses to language disciplining.

Tutoring and Mentoring for the Educational Success of Portuguese-Canadians and Latin-Canadians Through Community-Based Lived Experience (*Robert A. Kenedy*)

This article utilizes Brofenbrenner's ecological theory and Turner's notion of lived experience to analyze focus group and interview data with 22 *On Your Mark* tutors and mentors. This educational program has been developed by the *Working Women Community Centre (WWCC)* in Toronto to offer Portuguese-Canadian and Latin-Canadian youth and their families after school and weekend tutoring. The analysis of the data suggests that tutoring and mentoring builds community and promotes student success through the tutor's dedication to helping to mentor and guide students and work with their parents. Their proactive tutoring and mentoring efforts highlight the program strengths and efficacy. The data also reveals how *OYM* tutors find their volunteer work to be very rewarding in terms of helping students who struggle and making an impact that contributes to their specific ethnic and wider community of new Canadians who often cannot afford costly private tutoring. They report wanting to help students who struggle and make their experience better through supporting them pedagogically, personally, and socially. While tutoring is the main activity, mentoring also occurs in terms of form-

ing a long-term relationship to nurture academic success, promoting social growth through instilling confidence, encouraging post-secondary aspirations, and mentoring through being a sympatric listener.

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Identities in the Lusophone World

Introduction: Special Volume of the *Portuguese Studies Review*

Robert A. Kenedy
York University

Fernando Nunes
Mount Saint Vincent University

ON 5 MAY 2020, THE *United Nations Scientific and Cultural Organization* (UNESCO) celebrated the first *World Portuguese Language Day*.¹ In her message in recognition of this day, Ms. Audrey Azoulay, UNESCO's Director-General, referred to the Lusophone world as "a melting pot of myriad cultures enriched by each other's variety."² Indeed, the Lusophone world today includes people from numerous origins, long-standing native populations, located in disparate countries and regions, as well as multiple and diverse migrant diasporas, all linked together by a common historical and linguistic heritage.

Ms. Azoulay also went on to affirm that a language is "... more than a simple means of communication. It is a way of seeing and of feeling ... a vast repository of symbols and experiences, a kaleidoscope of dreams and creative wonderlands."³ Through these words, she recognized that there are important elements—some common, but most unique to each people's experience

¹"World Portuguese Language Day," Documents, United Nations Scientific and Cultural Organization, Accessed 14 March 2021, <https://en.unesco.org/commemorations/portuguese-language-day/2020>

²UNESCO, "Message from Ms. Audrey Azoulay, Director-General of UNESCO, on the occasion of World Portuguese Language Day," (United Nations Scientific and Cultural Organization, 5 May 2020, Document Code DG/ME/ID/2020/22), https://unesdoc.unesco.org/ark:/48223/pf0000373355_eng.locale=en



—which structure and shape the wide diversity that is found within the populations of this collective Lusophone heritage. These elements are related to regional historical experiences, as well as local realities, connected to economic activities, education, religion, and citizenship. Meanwhile, in the case of migrant and transnational populations, their diversity is also influenced by the policies, practices, and experiences in the regions of settlement, all of which dictate patterns of integration, multiculturalism, interculturalism and inclusion. It is in recognition and celebration of the importance of this diversity, as well as in attempts to understand its complexity, that this Special Issue was first conceived.

This Special Issue explores historical and contemporary identities in the Lusophone world and examines how these have been, and are, currently influenced by economic, educational, cultural, linguistic, religious, colonial, postcolonial, pre- and post-migratory realities. It begins with a historical assessment of the conversion process and forced belonging of Portuguese New Christians in Portugal during the late 1400s and early 1500s. This is followed by articles examining the Portuguese diaspora and identities in the Caribbean and Portuguese national identity based in the nineteenth century that were rooted in past exploration and colonization. The themes of colonialism are further explored in an analysis of colonial and post-colonial identities in Mozambique. The volume then concludes with articles dealing with the contemporary Lusophone diaspora in Canada in relation to “whiteness,” language, racism, and education in a multicultural context.

The themes of identity, belonging, and religion are evident in Ferreira’s historical examination of New Christians in Portugal. This article draws on *regimentos*, writs, and correspondence to examine how the Portuguese Crown attempted to integrate and assimilate New Christians into mainstream society. Ferreira considers the consequences of the legislation that was passed by King Manuel I (1495-1521), which both expelled all non-Christians from Portugal and also impeded the emigration of the majority of Sephardic Jews. The outcome was that tens of thousands of Jews, including those who had recently migrated from Spain, were forcibly converted to Christianity. Ferreira examines how the mass conversion of Jews and suppression of Judaism resulted in the separation of thousands of Jewish famil-

³UNESCO, “Message from Ms. Audrey Azoulay, Director-General of UNESCO, on the occasion of World Portuguese Language Day,” 5 May 2020.

ies, who were deprived of their traditional networks of social assistance. Her examination explores the strategies that were used by the Portuguese Crown to integrate and assimilate the New Christians, such as the creation of *Misericordias* to dispense charity, the regulation of burials, the creation of centralized hospitals to manage orphans and displaced persons, as well as legislation that prohibited marriage between New Christians.

Collins-Gonsalves' historical analysis explores the presence from the 1830s onwards of the Portuguese from Madeira, the Azores, and Cape Verde Islands in the British Caribbean territories of Guyana, St. Vincent, Trinidad, Bermuda, St. Kitts, Grenada, and Antigua. Her research builds on the existing scholarship on the Portuguese in the Caribbean, thematically focusing on arrivals across the Caribbean, entrepreneurship, inter-country communication and travel, culture, religion, country statistics and historical gastronomical references. These connections are explored and assessed in a comparative context, adding to the research on the nineteenth-century Lusophone influence in the British Caribbean.

Menez utilizes nineteenth century Portuguese and French accounts to describe how Zurara's fifteenth-century *Chronicles* of the Portuguese discoveries in Africa, (thought to be lost, but ultimately found in Paris in the nineteenth century) were used by the Portuguese to prove their right of first claim to overseas (African) discoveries, against other European powers. Menez also argues how these were used to cement the identity of the Portuguese nation, during that century. Arguably, this had the effect of rejuvenating Portuguese nationalism, as well as the importance of the Portuguese in the European international scene.

The article by Rato Rodrigues explores how Figueiredo's biographical experiences of colonial and post-colonial Mozambique informs her *biographical* writing and the process forming of a personal and collective identity based on articulating a memory, postmemory, and schizophrenic post-colonial identity as a displaced person. He argues how postmemory and schizoid identity create a problematic identitary formation in terms of the collective Portuguese post-colonial memory and on its particular and critical view which challenges nostalgia with its sharp and vivid language. This article also assesses the literary importance of Figueiredo's book, in terms its contribution to Portuguese post-colonial debate and as a feminine perspect-

ive in what is mostly a male-dominated area in the Portuguese literary sphere.

Carvalho analyses the relationship between languages and identities, as a social and political tool before and after independence in Mozambique, as described by three generations of 18 Mozambican students. Each generation recounts their stories in the historic and ideological settings of socialism (1975-1986), democracy (1986-2005) and neoliberalism (2005-present). The three periods are based on how the generations understand their biography, history, politics, identity, and gender approaches in relation to the way languages are used to (re)create national and social identities in post-colonial Mozambique, as a marker of social and political dominant position, and a way of giving access to political power.

Based on twenty interviews with Portuguese-Canadians in Toronto, Ari argues that the cultural background and low socio-economic positions of the Portuguese in Canada influence their whiteness. She uses Harney's (1990) term, "dark-white," which she attributed to the Portuguese living in the English-speaking world. Ari argues that social class and culture confers social colour to Portuguese-Canadians; a distinction that is based on racialization, immigration, capitalism, and development. Specifically, she argues that the notions of whiteness or lack of whiteness amongst the Portuguese in Canada are related to their socio-economic position and cultural background, because hegemonic whiteness is normally attributed mainly to "white-skinned," middle-class, Anglo-Saxon, Protestant and English speakers.

Pereira draws on data from a sixteen-month ethnography in a Toronto high school with a large population of Portuguese-speaking students (PSS), to argue that PSS' experience a non-belonging in formal education. He begins his work by establishing that formal education plays a key role in consolidating national identity based on unified culture(s) and a linguistic capacity that offer a path to national belonging. His research then goes on to use raciolinguistics, in order to understand the disciplinary practices targeting PSS and (re)producing a linguistically mediated non-belonging in education. Pereira argues that PSS adapt several language strategies which include resisting the practices of surveillance and discipline or not speaking Portuguese at school. These adaptive responses are not available to all PSS equally for reasons such as race, class, and language. His findings suggest that participants' experiences reflect painful emotions that impact the social and cul-

tural integration of some PSS at school. He points to critical language awareness offering potential strategies to increase understanding and empathy among school personnel for students' responses to language disciplining.

Finally, Kenedy's article utilizes Brofenbrenner's ecological theory and Turner's notion of lived experience to analyse focus group and interview data with 22 *On Your Mark* tutors. This Toronto-based educational program was developed by the *Working Women Community Centre (WWCC)* to offer Portuguese-Canadian and Latin-Canadian youth after school and weekend tutoring. The data suggests that tutoring and mentoring builds community and promotes student success through the tutor's dedication to helping to mentor and guide students and work with their parents. Their proactive tutoring and mentoring efforts highlight the program strengths and efficacy and reveals how OYM tutors find their volunteer work to be very rewarding in terms of helping students. Tutors report wanting to help students who struggle and make their experience better through supporting them pedagogically, personally, and socially. While tutoring is the main activity, mentoring also occurs in terms of forming a long-term relationship to nurture academic success, promoting social growth through instilling confidence, encouraging post-secondary aspirations, and mentoring through being a sympathetic listener.

Overall, this volume examines how Lusophone identities are synergistically related with local, regional and transnational historical experiences, colonial, and postcolonial diasporic factors and political realities, related to economic activities, education, religion, settlement, and citizenship. In this way, this Special Issue provides a glimmer of the richness and diversity of experiences, which this globalized, Portuguese-speaking *melting pot* has contributed to a common Lusophone heritage.

Robert A. Kenedy, Guest Co-Editor

Fernando Nunes, Guest Co-Editor

Queen Leonor of Viseu, Corporate Kingship and the Centralization of Pious Institutions in Early Modern Portugal (1479-1521)

Susannah Ferreira
University of Guelph

IN 1575, FR. BERNARDO DE MADRE DE DEUS described in elaborate detail, the first statutes, or ‘compromisso,’ of the *misericórdia* of Lisbon. Like many manuscripts of late medieval Portugal, the codex has long since disappeared: perhaps a casualty of the Lisbon earthquake or even a calculated purge. In his depiction of the treasure, Madre de Deus illustrated its sumptuous binding of blue velvet, adorned with silver ornaments. Allegedly composed by Fr. Miguel de Contreiras, the *compromisso* bore on one side, four signatures: those of Manuel I, his consort, the king mother, and the dowager queen, Leonor of Viseu (1458-1525).¹ Given the basic facts of Manuel I’s first two marriages and his movements, the document must have been signed long before it was notarized by Duarte Borges on 25 September 1500.² The signatures also evidence a strategic use of the concept of corporate monarchy—deployed by the Portuguese crown as it centralized charity and almsgiving at the turn of the sixteenth century.

The details surrounding the foundation of the Portuguese charity, the Santa Casa da Misericórdia, have been the subject of historical debate for the better part of a century. Such attention is perhaps commensurate with the size and influence of the modern-day institution. As a Catholic association

¹Fr. Bernardino Madre de Deus, *Santíssima Ordem da Trindade* (1575), in Victor Ribeiro, *A Santa Casa da Misericórdia de Lisboa: Subsídios por a sua história* (Lisbon: Academia Real das Ciências, 1902), 49.

²One signature: ‘La Reina’ could only have been Isabel of Asturias who died in childbirth on 23 August 1498. Manuel I did not marry Maria of Aragon until 30 October 1500.



predicated on the works of mercy set out in the Book of Matthew, the question of its origins has been approached as a debate over who should receive the credit. Scholars have alternately named Leonor of Viseu, Manuel I and an obscure Trinitarian friar, Fr. Miguel de Contreiras as founders of the Santa Casa da Misericórdia. The importance of the origin story and its implications for Portuguese national identity, have fuelled allegations by scholars that the figure of Contreiras was wholly invented by Fr. Bernardo de Madre de Deus who thereby hoped to enhance the prestige of the Trinitarian Order.³ While indeed, no documentary evidence of Contreiras has survived, such a charge seems extreme, since in 1575 Madre de Deus was writing about a famous figure who would still have existed in living memory. It seems far more likely that the foundational role of Contreiras was merely exaggerated.

The leading part played by Leonor of Viseu in the realm of public assistance seems to have equally been distorted. Although it is clear that the dowager queen had a sure hand in the creation of the *misericórdias*, as well as other pious institutions around Portugal, the scope of her involvement has generally been characterized as that of an independent agent, rather than an appendage of the corporate monarchy.⁴ The distortion is partly attributable to a strand of women's history that prefers the political contributions of women made in their 'own right', rather than in collaboration with male relatives. But partly, as this article will argue, the depiction of Leonor of Viseu as an independent benefactor was part of a careful image cultivated by the crown to smooth the path as it centralized of charitable institutions. Though touted in terms of social betterment, the consolidation of hospitals in Lisbon and the creation of the *misericórdias* were interrelated and self-serving actions which had the potential to incur resistance. The dowager

³For a detailed overview of the historiography, see Isabel dos Guimarães Sá, "Memórias, mitos e historiografia Portuguesas," in *Portugaliae Monumenta Misericordium*, vol. 10 (Lisbon: União das Misericórdias Portuguesas, 2017), 451-500.

⁴Fernando de Silva Correia, *Origens e Formação das Misericórdias Portuguesas*, 2nd ed. (Lisbon: Livros Horizonte, 1999), 447-51; Ivo Carneiro de Sousa, *Da descoberta da misericórdia a fundação das Misericórdias (1498-1525)* (Porto: Granito, 1999) and *A Rainha D. Leonor*, (Lisbon: Calouste Gulbenkian, 2002); Ana Rodrigues Oliveira, "Leonor de Lencastre (1458-1525) A Princesa Perfeitíssima," in *Rainhas medievais de Portugal* (Lisbon: A Esfera dos Livros, 2010), 521-554.

queen's stylized involvement exemplifies the political role that royal women could play in corporate monarchies.

Historian Theresa Earenfight has described the corporate nature of monarchy as rule exercised through a dynasty, that blended domestic and political functions—although, as she has claimed, “not necessarily in equal parts.”⁵ In her portrait of Maria of Castile, who served as the lieutenant-general of Aragon during the reign of her husband, Alfonso V (1416-1458), Earenfight illustrated in detail how the monarchy was not merely understood as the body of the king, but of the royal family working as a whole.⁶ Her definition went beyond the distinction between female power as informal influence and male authority as legitimated power. Kings used their spouses to help them rule effectively, drawing on their dynastic loyalty and their gender norms. Other historians have highlighted the ways in which how consorts took on an intercessory and diplomatic role to aid in rule.⁷

Queen consorts, additionally, had long exercised informal influence in the domain of charity and charitable institutions. Diana Webb has shown how in Italian city states in the thirteenth century, the Virgin Mary came to play a key role in civic ceremonies related to confraternities which depicted her as a queen in majesty: the Madonna della Misericordia.⁸ In early fourteenth century Portugal, an astute and politically active dowager queen, known as the Rainha Santa Isabel (1271-1336), came to embody this allusion between queenship and charity.⁹ During her lifetime the Rainha Santa Isabel was a known patron of the Trinitarian Order and frequently distributed alms to the poor. Two centuries later, crown historians and diplomats were

⁵Theresa Earenfight, *Queenship in Medieval Europe* (New York: Palgrave Macmillan, 2013), 25.

⁶Theresa Earenfight, *The King's Other Body: María of Castile and the Crown of Aragon* (Philadelphia: University of Pennsylvania Press, 2010).

⁷See for example the essays in Elena Woodacre, ed., *Queenship in the Mediterranean: Negotiating the Role of the Queen in the Medieval and Early Modern Eras* (New York: Palgrave Macmillan, 2013).

⁸Diana Webb, “Queens and Patrons,” *Queenship in Medieval Europe*, ed. Anne J. Duggan (Woodbridge: Boydell Press, 1997), 205-22.

⁹For recent biographical works on St. Isabel of Aragon see Helena Maria Ribeiro Almeida da Costa Toipa, *Rainha Santa Isabel: fontes para o seu estudo* (Coimbra: Imprensa da Universidade de Coimbra, 2020); Ana Rodrigues Oliveira, “Isabel de Aragão (1270–1336). A Rainha Santa,” in *Rainhas medievais de Portugal* (Lisbon: A Esfera dos Livros, 2010), 151-211.

able to build on these associations to frame Leonor of Viseu's own political involvement in the centralization of charitable institutions. As José Pedro Paiva has recently indicated, the political power of the imagery of 'the Virgem da Misericórdia', was well understood in late fifteenth century Portugal.¹⁰

The weight of the historical writing on the Santa Casa da Misericórdia, has shaped its research. As a successful charitable organization that has survived into the present day, it is unsurprising that its first modern historians were closely affiliated with it. Victor Ribeiro was an archivist for the Santa Casa da Misericórdia of Lisbon; Fernando da Silva Correia was the director of the Hospital of Caldas da Rainha, the hospital-spa founded by Leonor of Viseu in 1485.¹¹ The institutional approach taken by them, and other historians of their generation, looked back into the past in order to trace the long term evolution of the Santa Casa da Misericórdia over centuries.¹² While such a broad focus highlights continuities, it nonetheless downplays the fast pace of historical change that swept through the first half of the sixteenth century. In this time frame, the Portuguese crown awoke to a sudden financial windfall from the spice trade and grappled with a rapidly shifting and hardening attitude towards New Christians.¹³ As it began to emerge as a mature organization in the 1540s, the Santa Casa da Misericórdia, occupied an historical landscape that was very different from that which spawned the first *misericórdia* in Lisbon in 1498.

One of the casualties of the institutional approach has been to the interconnectedness of pious institutions in the early sixteenth century. Prior to

¹⁰José Pedro Paiva, "Introdução," *Portugaliae Monumenta Misericordiarum*, vol. 2, ed. José Pedro Paiva et al. (Lisbon: União das Misericórdias Portuguesas, 2017), 12.

¹¹Guimarães Sá, "Memória, mitos e historiografia," 452-55.

¹²Other examples of this institutional approach include Costa Goodolphim, *As Misericórdias* (Lisbon: Imprensa Nacional, 1897); Artur de Magalhães Basto, *História da Santa Casa da Misericórdia do Porto*, 2 vols. (Porto: Santa Casa da Misericórdia, 1934).

¹³The degree of religious intolerance in late fifteenth century Portugal is a subject of disagreement among historians. Francisco Bethencourt describes widespread tensions between Old and New Christians from the point of the conversions. Francisco Bethencourt, *Racisms. From the Crusades to the Twentieth Century* (Princeton: Princeton University Press, 2013). Stuart Schwartz has pointed to a surprising amount of sympathy for non-Christians early sixteenth century Portugal. See Stuart Schwartz, *All That can be Saved: Religious Tolerance and Salvation in the Iberian Atlantic World* (New Haven: Yale University Press, 2008).

the mid-sixteenth century, a period when many early modern administrative bureaucracies began to reach maturity, these institutions were less compartmentalized and more personal. Connections between hospitals and confraternities were seldom spelled out in ordinances and *regimentos* but can instead be found among people: that is, in their personal relationships, their political affinities and in plural appointments.¹⁴ Women, who were largely excluded from holding office, and who generally exercised power informally, are invisible in historical works that focus on formal appointments and written statutes. Their political contributions, couched in the gendered images of spontaneous charity and emotional intercessions, thus go unrecognized.

The second casualty of the institutional approach to the hospitals and *misericórdias* has been a meaningful consideration of motives. The spiritual obligation to give and to receive charity was, no doubt, a serious one for aristocratic elites. But charity was, in the Middle Ages, carried out as a personal act. The chronicler Damião de Góis relayed how on his deathbed, king João II left funds to pay for the dowries of forty-one orphans and to pay the ransoms of forty-one captives.¹⁵ But there are no passages which recount discussions among the king and his councillors of how they might best alleviate poverty or contribute to the commonweal. And while, over the long term, the centralization of hospitals and *misericórdias* may have improved society as a whole—at the turn of the sixteenth century, poor relief was not yet conceived of in this way by the state.¹⁶ Still, the cumulative impact of siloed analyses of hospitals and *misericórdias* imparts a tacit assumption that these were created and consolidated to relieve poverty rather than for the initial self-serving aim of the crown: to gain control over almsgiving and bequests.

¹⁴A fascinating example is illustrated in an article by David Grummitt which demonstrated hitherto undocumented connections between Henry VII's chamber and the English exchequer that were formed by the cross-appointment of two clerks who then funnelled money between the two departments. See David Grummitt, "Henry VII, Chamber Finance and the New Monarchy: Some New Evidence," *Historical Research* 179 (1999): 229-243.

¹⁵Damião de Góis, *Crónica de D. Manuel*, vol. I (Coimbra: Universidade de Coimbra, 1949), cap. I, p. 6.

¹⁶Paul Slack, *From Reformation to Improvement: Public Welfare in Early Modern England* (Oxford: Oxford University Press, 1999), 5-28.

Pious institutions and Manueline reforms

The amalgamation of the hospitals of Lisbon and the regulation of other pious institutions, such as confraternities, hostels and chantries, was a move that stretched back to the early fifteenth century and aimed to regulate almsgiving and bequests. On the surface, charitable donations seemed to benefit the crown only indirectly and historian Maria de Lurdes Rosa has emphasized the spiritual rewards gained by the crown. She has indicated that the reform of the *morgadios e capelas* cannot be seen as a form of administrative modernization, since the creation of these entails and chantries themselves were an archaic mechanism by which testators could avoid taxation.¹⁷ However the centralization of pious institutions benefited the crown, not by modernizing customary practices, but by allowing crown officials to better monitor existing forms of testamentary provisions and bequests. By the fifteenth century, there were, for example, laws restricting the endowment of lands to religious institutions and there were circumstances in law in which the property of testators was to revert to the crown.¹⁸ Equally, complex conditions would later surround the property of New Christian youths whose parents had forfeited lands by refusing to convert to Christianity during the forced conversions of 1497.¹⁹ However, in order to profit from escheats, the crown had to be aware that endowments were owed to it and it also had to enforce regulations. With so many small hospitals, chapels and chantries spread throughout the kingdom, such enforcement was near-impossible. To help collect what was owed to it, 1470, King Afonso V (1438-1481) first issued the *Regimento dos Hospitais and Albergarias* in Évora that allowed crown agents to inspect the assets of hospitals and inns, to ensure that they were operating in compliance with their benefactors' instructions and that they had paid the crown its dues.²⁰ In 1479, the amalgamation of the hospitals in Lisbon was decreed by a papal bull issued by Pope Sixtus IV.²¹ The fact that these bulls were confirmed by both Innocent VIII in 1485 and Alexander VI

¹⁷Maria Lurdes Rosa, "O Estado Manuelino: a reforma de capelas, hospitais, albergarias e confrarias," in *O Tempo de Vasco da Gama*, ed. Diogo Ramada Curto (Lisbon: Difel, 1998), 206.

¹⁸Ordenações Afonsinas, liv. 2, tits. XIV-XV, pp. 174-183.

¹⁹Susannah Humble Ferreira, "Manueline Marriages: Marriage, Wardship and the Assimilation of Cristãos Novos 1497-1507," *Sixteenth Century Journal* 51 (2) (2020): 332-33.

²⁰Abreu, *Political and Social Dynamics of Poverty*, 31.

in 1492, suggests that amalgamation did not occur, in a meaningful way, before the creation of the Hospital of Todos of Santos.²²

The amalgamation of hospitals also helped the crown to benefit from almsgiving. Not all alms went to the poor, and those given for ‘pious uses’ could easily be diverted toward projects of great interest to the crown. Such projects might include the construction of sumptuous buildings that beautified towns and projected wealth and power. Alms could equally be used for the patronage of influential clerics. And they were often raised to ransom captives who had been taken prisoner in the Portuguese campaigns in Morocco. In the case of the *concelho* of Arruda, near Óbidos, alms collected for the purpose of ransoming captives were redirected toward public works and the repair of the water supply.²³

The crown’s attempt to regulate almsgiving and bequests needs to be viewed in the context of its financial circumstances at the end of the fifteenth century and not in the context of its fabulous wealth later gained through the spice trade. By the end of his reign, in 1521, Manuel I had been able to make magnanimous contributions to the *misericórdias* at a rate of a million réis annually to provide for poor orphans and he made a further annual gift of 500,000 réis to be put toward other good works.²⁴ But earlier, in the beginning of his reign, the king’s financial footing had been far less secure and it took him many years to pay down the household tallies and war debts accrued by his predecessors.²⁵ What is more, the two major political actions undertaken in 1496: to restore the House of Bragança and to force the conversion of Portugal’s Jews, had serious financial consequences. Both actions required the crown to make substantial payments to Portuguese elites in order to compensate them for lost revenues.²⁶

²¹“Bula Ex debito sollicitudinis, do papa Sisto IV,” *Portugaliae Monumenta Misericordiarum*, vol. 2, no. 22, pp. 52-53.

²²Laurinda Abreu, *The Political and Social Dynamics of Poverty, Poor Relief and Health Care in Early-Modern Portugal* (New York: Routledge, 2016), 31-2.

²³IANTT, Chancelaria de D. Manuel I, liv. 32, fol. 1

²⁴Góis, *Crónica de D. Manuel*, vol. 4, cap. 85.

²⁵IANTT, Chancelarias de D. Manuel, liv. 17, fols. 39, 59^v, 75, 97.

²⁶Susannah Humble Ferreira, *The Crown, the Court and the Casa da Índia* (Leiden & Boston: Brill, 2015), 71-78.

It was in this uncertain financial climate that many reform projects were undertaken by the Portuguese crown. In their essence, most of these projects aimed to increase crown revenues by refining systems of audit and collection. The extent of these reforms has been treated at length elsewhere and does not need much elaboration, except to say that Manuel I asserted masculine regal authority in all areas associated with traditional kingship: justice, taxation, noble patronage and relations with the episcopacy.²⁷ And to a certain extent, the amalgamation and regulation of pious institutions such as hospitals and confraternities was an integral part of this extensive process.²⁸ In order for the Portuguese crown to raise funds through the regulation of almsgiving and bequests, however, donors and testators had to continue making gifts. And it is the voluntary nature of charitable giving therefore, that sets it apart from obligatory taxation. It is for this reason that the Portuguese crown encouraged donations to hospitals and *misericórdias* by emphasizing the piety of good works. It did so by drawing on the corporate nature of monarchy and harnessing the efforts of Leonor of Viseu.

Born in 1458, Leonor of Viseu had been well trained in the art of female aristocratic piety. Her mother, the Infanta D. Beatriz, had instituted the convent of Nossa Senhora da Conceição in Beja which came to house numerous noble women who were closely affiliated with the royal court.²⁹ Later in her life, Leonor of Viseu would establish the convent of Madre de Deus in Lisbon, that cultivated strong connections with the Florentine merchant communities in Lisbon and formed ties with the famous convent of La Murate in Florence. Correspondence, art, precious objects and, ostensibly, political influence were transmitted between the two religious houses.³⁰ In 1485, when she took steps to establish the hospital of Santa

²⁷João Paulo Oliveira e Costa, *D. Manuel I* (Lisbon: Círculo de Leitores, 2005), 128-39; João José Alves Dias et al. "A Conjuntura," in *Portugal do Renascimento à crise dinástica* (Lisbon: Presença, 1998), 714-6

²⁸Maria de Lurdes Rosa, "O Estado Manuelino: a reforma de capelas, hospitais, albergarias e confrarias," in *O Tempo da Vasco da Gama*, ed. Diogo Ramada Curto (Lisbon: Difel, 1998), 206.

²⁹An example is Justa Rodrigues Pereira, see Caetano de Sousa, *História Genealógica da Casa Real Portuguesa*, vol. II, 33-36.

³⁰Kate Lowe, "Rainha D. Leonor of Portugal's Patronage of Florence in the Renaissance and Cultural Exchange," in *Cultural Links between Portugal and Italy in the Renaissance*, ed. Kate Lowe (Oxford: Oxford University Press, 2000), 226-48.

Maria del Pópulo at the hot springs near Óbidos, she was twenty-seven years old and a seasoned politician, having already once served as regent of Portugal.

The creation and consolidation of hospitals required the assent of the Pope because it interfered with spiritual matters relating to the endowment of chantries. And the shortest avenue to obtaining this assent was through the Portuguese cardinal, Jorge da Costa (ca. 1406-1508). But João II was not on best terms with the cardinal, having quarrelled with him in 1481.³¹ Because hospitals fell within the realm of charity, a sanctioned sphere of activity for noble women, Leonor of Viseu took the reins.³² Her first major project was the creation, in 1485, of the Hospital of Santa Maria del Pópulo at the thermal springs outside of Óbidos, a town associated with Portuguese queens. Later, in 1496, her close relationship with Cardinal da Costa helped her to secure a bull granting plenary indulgences to all those who contributed to the building of the hospital.³³ Although the creation of the hospital was seen as a gesture of poor relief, Santa Maria del Pópulo was probably more of a spa than a charitable institution. Certainly, it was far from the urban areas of Lisbon or Porto where the poor might be expected to congregate. Nonetheless, her patronage of the hospital helped to secure her credibility as the public face of poor relief. And over the course of the reign of her husband's reign she increased her involvement with the poor, intervening personally when authorities in several municipalities complained of vagrants who slept on public porches.³⁴

The collaboration of Leonor of Viseu and Cardinal Jorge da Costa, in the creation of the hospital of Santa Maria del Pópulo and in the formation of the *misericórdia* of Lisbon, was more than a friendship between a young queen and an aged cardinal. It was a political relationship between the queen, as an arm of the corporate monarchy, and the cardinal who was both a dignitary of the Sacred College and the Archbishop of Lisbon. Appointed to the cardinalate in 1476, Jorge da Costa had left for Rome in late 1479. Al-

³¹D. S. Chambers, "What Made a Renaissance Cardinal Respectable? The Case of Cardinal Costa of Portugal," *Renaissance Studies* 12 (1) (1998): 89.

³²Carneiro de Sousa, *Da Descoberta da Misericórdia*, 94-96.

³³*Portugaliae Monumenta Misericordiarum*, vol. 2, no. 25, p. 56.

³⁴Carneiro de Sousa, *Da Descoberta da Misericórdia*, 43-44.

though he never returned to Portugal, he served as Archbishop of Lisbon from 1464 until 1500. His surviving correspondence indicates that he continued to serve Portuguese interests effectively while in Rome and though technically an absentee prelate, there is no evidence to suggest that he neglected the archdiocese. To do so would run contrary to his source of power as a cardinal, which was his ability to broker relations between elites in Portugal and Rome.³⁵ In the tumultuous reign of Pope Alexander VI (1492-1503), when the amalgamation of hospitals and the creation of the *misericórdias* occurred, Cardinal da Costa rose in influence. Instability and attempts to oust the pope, launched by the fiery preacher Girolamo Savonarola and others, resulted in Cardinal da Costa being entrusted to take on a greater role in the papal government.³⁶ His correspondence with Leonor of Viseu, which continued up until the end of his life in 1508, is evidence of his enduring interest in both the amalgamation of the hospitals and the creation of *misericórdias*, which were modelled along Italian lines.³⁷

In 1492, forty-three hospitals were consolidated into the Hospital of Todos os Santos. Although a palatial edifice constructed in the lavish style of Manueline architecture would eventually dominate the eastern side of the Rossio square, the early changes were organizational. A papal bull was necessary to channel led into the hands of a single overseer or provedor.³⁸ The individual placed in charge was a canon of the cathedral of Lisbon, Estevão Martins, who in terms of ecclesiastical hierarchy would have answered to Cardinal da Costa. Soon after the accession of Manuel I to the throne, Martins was also named as a member of an important commission, the *juízo das capelas*, that set out to investigate chantries and inspect bequests and endowments made to pious institutions throughout Portugal in order to see if they complied with regulations.³⁹

³⁵D. S. Chambers, "What Made a Renaissance Cardinal Respectable," 90.

³⁶Marco Pellegrini, "A Turning-point in the History of the Factional System in the Sacred College: The Power of Pope and Cardinals in the Age of Alexander VI," in *Court and Politics in Papal Rome (1492-1700)*, ed. Gianvittorio Signorotto (Cambridge: Cambridge University Press, 2002), 8-15.

³⁷Lowe, "Rainha D. Leonor of Portugal's Patronage of Florence," 230.

³⁸"Bula Ex debito sollicitudinis, do papa Sisto IV," *Portugaliae Monumenta Misericordiarum*, vol. 2, no. 22, pp. 51-3.

³⁹Abreu, *Political and Social Dynamics of Poverty, Poor Relief and Health Care*, 31-32.

The partnership of the crown and church, fostered by the relationship of Leonor of Viseu and Cardinal Jorge da Costa, facilitated the consolidation of hospitals and eventually allowed *misericórdias* to gain a monopoly throughout Portugal. By 1521, all the small hospitals around the kingdom, not already subsumed by central hospitals, were given to the *misericórdias*.⁴⁰ The *misericórdia* of Lisbon quickly became a template and between 1499 and 1500 Manuel I sent letters to other town councils ordering them to form new confraternities on the model of Lisbon. These *misericórdias* gradually accrued a monopoly on charitable activities such as driving corpses to their burial.⁴¹ As other monopolies were gradually extended to the *misericórdias*, the cooperation of the episcopacy became important. For example, the Bishop of Coimbra, D. Jorge de Almeida, authorized *mamposteiros* to collect alms for the ‘recently established’ *misericórdia* of Coimbra on Sundays and conceded forty days of indulgence to those who contributed to it.⁴² Such assistance was required in a period when, according to the *provedor* of the *misericórdia* of Beja, competition among confraternities was intense.⁴³

Conversion of the Jews

Although the amalgamation of hospitals was conceived of long before the sudden expulsion of the Jews from Spain and the forced conversion of the Jews and Muslims in Portugal, these events had a profound impact on reform of pious institutions. Within months of the Alhambra decree, promulgated by the Catholic Kings, Ferdinand of Aragon and Isabel of Castile on 31 March 1492, tens of thousands of Jewish refugees spilled across the border. All who crossed into Portugal legally were required to pay a hefty head tax. Although most Jews were supposed to make their way to the ports and arrange transport out of Portugal, an amorphous group of six hundred families, was permitted to stay.⁴⁴ The numerous Jewish refugees who arrived in Lisbon undoubtedly congregated in the synagogues of the city to organize

⁴⁰Guimarães Sá, *Quando Rico faz Pobre*, 59.

⁴¹Penteado, “Confrarias,” 462.

⁴²*Portugaliae Monumenta Misericordiarum*, 3: 36.

⁴³IANTT, *Corpo Cronológico*, parte II, maço 3, no. 40.

⁴⁴François Soyer, *The Persecution of the Jews and Muslims of Portugal: King Manuel and the End of Religious Tolerance (1496-7)* (Leiden & Boston: Brill, 2007), 101-10.

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well as hospitals in Coimbra, Leiria and elsewhere. Many of the hospitals that she established, including that of Santa Clara da Coimbra, had chaplains that performed the sacraments for the poor.⁸⁰ Her patronage of the Trinitarian convent of Lisbon led to the expansion of the convent between 1274 and 1325 and the construction of its main church: the Igreja da Santíssima Trindade, in which she dedicated a chapel to Nossa Senhora de Conceição.⁸¹ St. Isabel of Aragon's backing of the Trinitarian Order included the support and protection which she gave to the *Redemptor dos Cativos* a Trinitarian friar named Estevão Soeiro who served as her confessor.⁸²

The crown's use of historical allusion as a means to promote the work of Leonor of Viseu was subtle, but common in a period where History invited the juxtaposition of the past and present. The chronicle of Afonso Henriques, published by Duarte Galvão in 1505, told of the exploits of Portugal's first king during the Reconquista in order to call up Manuel I' campaigns in Morocco. Not surprisingly, the origins of the stories about the miracles of St. Isabel of Aragon are murky. But it is apparent that they surfaced in earnest during the reign of Manuel I. In 1499, the manuscript of the anonymous *Crônicas dos Sete Primeiros Reis de Portugal* contained a full chapter on the miracles allegedly performed by Isabel of Aragon.⁸³ A separate tract held in the Biblioteca Nacional de Portugal, entitled "Vida e milagres da rainha Santa Izabel molher del rey Dom Dinis deste nome o primeiro rei de Portugal", and possibly authored by Duarte Galvão, dates to the early sixteenth century.⁸⁴ It can be no coincidence that in 1516, just as Leonor of Viseu published the *compromisso* of the *misericórdia* of Lisbon, Manuel I sent emissaries to Pope Leo X to have Isabel of Aragon beatified.⁸⁵ The public recognition of Isabel of Aragon, of her good works, drew attention to the charity and patronage of Leonor of Viseu.

⁸⁰Caetano da Sousa, *História Genealógica da Casa Real Portuguesa*, I: 136.

⁸¹Drumond Braga, *Entre a Cristandade e o Islão*, 155.

⁸²Gustavo de Matos Sequeira, *O Carmo e a Trindade, subsídios para a história de Lisboa*, vol. I, (Lisbon: Câmara Municipal de Lisboa, 1939), II-13.

⁸³*Crônicas dos Sete Primeiros Reis de Portugal*, ed. Carlos da Silva Tarouca (Lisbon: Academia Portuguesa da História, 2009), vol. 2, cap. IV, pp. 15-17.

⁸⁴BNL cod. 378, "Vida e milagres da Rainha Santa Izabel molher del Rey Dom Dinis deste nome o primeiro rei de Portugal,"s. d.

⁸⁵Caetano de Sousa, *História genealógica da casa real portuguesa*, I: 140.

Portuguese subjects in the early sixteenth century could draw other connections between the two women. Like Leonor of Viseu, Isabel of Aragon had been politically active as a queen dowager and had notably appeared as a peace maker in a dispute between her son Afonso IV, and Alfonso XI of Castile. She had lobbied the pope to have the feast day of Nossa Senhora da Conceição recognized and celebrated in Portugal on 8 December. Not surprisingly, this dogmatic title of the Virgin Mary was chosen for the main church of the *misericórdia* of Lisbon, Igreja de Nossa Senhora da Conceição, when it was completed in 1517. And additionally, there is the alleged role of Fr. Miguel de Contreiras in the foundation of the *misericórdias*. The absence of direct evidence that can be used to support or deny the friar's existence makes it difficult to weigh in on the matter. But the fact that Isabel of Aragon had a close connection to her own Trinitarian confessor suggests that Leonor of Viseu might well have enlisted the support of a Trinitarian friar to promote the *misericórdias*, if she had had such a confessor on hand.

Conclusion

Leonor of Viseu's placement, at the helm of the *misericórdia* of Lisbon, circumscribes the scope of political action open to medieval queens, and further evidences the crown's use of corporate monarchy as it centralized charity and almsgiving in Portugal. The extent to which the dowager queen can be credited for founding the Santa Casa da Misericórdia is an historical 'red herring'. As an experienced politician, apprised of the legal constraints and financial pressures that faced the crown during the reigns of her husband and brother, she developed her connections and honed her image to pursue their collective goals. Her depiction as an agent of mercy or '*misericórdia*', moved by the suffering of the poor, was cultivated by the crown to obfuscate its encroachment into the sphere of private charity.

The emphasis of the historiography on hospitals and *misericórdias* has, to date, focused on their provision of poor relief. But the consolidation of hospitals in Lisbon into the Hospital dos Todos os Santos and the creation of the *misericórdia* of Lisbon were interrelated actions that were motivated by the desire of the crown to better monitor the income of pious institutions and collect the revenues that were owed to it in the form of escheats. The regulation of alms and their collection by central *mamposteiros* allowed the crown

to channel money into projects of royal importance. Such projects undoubtedly included opulent buildings, such as the Igreja da Nossa Senhora de Conceição and the Hospital dos Todos os Santos, that loomed in the central squares of Lisbon. Built in the Manueline style of architecture, they were undoubtedly emblazoned with the symbols that conveyed royal power. Ostensibly, alms paid for the ransom of prisoners captured in Manuel I's campaigns in Morocco would have thus underwritten some of the costs of military resurgence in the region. The means by which the Portuguese crown appropriated revenue from pious institutions elucidates the extent of the Manueline reforms and the process of centralization, in a period of rapid historical change. The deep involvement of Leonor of Viseu in this consolidation of resources illustrates how the association of queenship and charity could be used for political advantage.

The most controversial action taken in the reign was undoubtedly the forced conversion of the Jews in 1497. Unlike the outright expulsion of the Sephardim from Aragon-Castile in 1492, the General Conversion of 1497 required the coercion and co-option of the Jews themselves. To this end, the *misericórdia* of Lisbon played a vital role, not only in the provision of charity and assistance to former Jews who had been impoverished and displaced, but by pressing them to assimilate. As the daughters of the Catholic monarchs who had founded the Spanish Inquisition, Manuel I's first two consorts were wholly unsuited to become chief patrons of the *misericórdias*. By way of contrast, Leonor of Viseu had ties to various Jewish communities and was closely connected to the syndicate of Lisbon merchants. And as Leonor of Viseu positioned herself as the chief proponent of the *misericórdia* of Lisbon, Manuel I could distance himself from the New Christian population, thereby retaining an aura of orthodox Catholicism.

The role that Leonor of Viseu performed in the consolidation of pious institutions tells us much about the political role that aristocratic women could, and did, play in premodern Europe. Normative ideology, which disapproved of the political participation of women and which barred them from public office, equally led to their under-representation in narrative histories. The participation of noble and royal women in governance has been painted with a gendered brush: women performed acts of charity, of intercession, and appeared as supplicants to religious authorities on behalf of their male relatives. It is evident that Leonor of Viseu was complicit in cul-

tivating her image as a patron of charitable institutions and sought to encourage almsgiving by establishing herself as a pious example. While self-promotion would be considered vanity, the crown was able to elevate the figure of Leonor of Viseu through the celebration of Isabel of Aragon and in so doing, lobbied the papacy for her beatification. It remains that the history of noble women in the premodern period may benefit from a shift in the longitudinal histories of religious houses and pious institutions, to short-term analyses that focus on individuals and their connections. The diplomatic activity of women like Leonor of Viseu may have appeared spiritual, personal, and informal, but it was nonetheless deeply political.

Historical Perspectives of the Portuguese in the Caribbean¹

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THE HISTORY OF THE PORTUGUESE from Madeira, the Azores, and Cape Verde Islands in the Caribbean is a field of research that has engaged scholars over the years.² Of the comparative studies on the Portuguese in the

¹I acknowledge with thanks the institutional support received from the Gorsebrook Research Institute for Atlantic Studies, Saint Mary's University, Halifax, Nova Scotia, Canada in the completion of this research. I appreciate the positive feedback of the academics at the Dalhousie University Department of History seminar, where an early version of the paper was first presented in January 2020. I thank the editors Dr. Fernando Nunes and Dr. Robert Kenedy as well as the anonymous reviewers of the *Portuguese Studies Review* for their insightful comments.

²The main references are: Trinidad and Tobago see K. O. Laurence, "Immigration into Trinidad and British Guiana, 1834-1871," PhD diss. (University of Cambridge, 1958), 77-109; K. O. Laurence, *Immigration into the West Indies in the 19th Century* (Barbados: Caribbean Universities Press, 1971); K. O. Laurence, *A Question of Labour: Indentured Immigration into Trinidad and British Guiana, 1875-1917* (Kingston: Ian Randle Publishers, 1994); Jo-Anne S. Ferreira, "The Portuguese Language in Trinidad and Tobago: A Study of Language Shift and Language Death," PhD diss. (University of the West Indies, St. Augustine, 1999); Jo-Anne S. Ferreira, *The Portuguese of Trinidad and Tobago: Portrait of An Ethnic Minority*, revised edition (Kingston, Jamaica: The University of the West Indies Press, 2018); and Fiona Rajkumar, "An Investigation of the Links Between Ethnicity and Economic Prosperity, With Reference to the Chinese, Portuguese and Syrian Communities in Trinidad 1945-1981," PhD diss. (University of the West Indies, St. Augustine, 2007). For Guyana see Mary Noel Menezes, *The Portuguese of Guyana: A Study in Culture and Conflict* (London: M. N. Menezes, 1994); Mary Noel Menezes, *Scenes from the History of the Portuguese in Guyana* (London: M. N. Menezes, 1986); Michael Wagner, "Structural Pluralism and the Portuguese in Nineteenth Century British Guiana: A Study in Historical Geography," PhD diss. (McGill University, 1975); Anna Cabral, "The Rise Of The Portuguese Retailer in 19th Century British Guiana," MA Thesis (Queen's University, 1995); and Joanne Collins-Gonsalves, "The Entrepreneurship of the Portuguese of Georgetown, British Guiana 1840-1940," PhD diss. (University of the West Indies, St. Augustine, 2014). For St. Vincent see Robert Ciski, "The Vincentian Portuguese: A Study in Ethnic Group Adaptation," PhD diss. (University of Massachusetts,



English-official Caribbean territories, K. O. Laurence's 1958 dissertation includes an in-depth historical study of the Portuguese in Trinidad and Guyana (then British Guiana³) for the period 1834-1871.⁴ His subsequent publications included comprehensive research on the evolution of long-term labour contracts in Trinidad and Guyana as well as the entrance of the Portuguese into business, among other areas.⁵ J. S. Ferreira continued this discourse and extended the study to Antigua and St. Vincent (in addition to Trinidad and Guyana) in her comparative study.⁶ Ferreira included significant and new research on cultural assimilation, business ventures and key population statistics up to the 1960s in Trinidad and Tobago. Her work addressed the mitigating factors that led to the departure of Dr. Kalley's followers and their arrival in the Caribbean. This was juxtaposed with the research of M. N. Menezes on Guyana, R. Ciski on St. Vincent and S. Lowes on Antigua among others.⁷ Her paper therefore presents incisive comparative research on the Portuguese in the identified territories in the Caribbean.⁸ M. Newitt in his publication, *Emigration and the Sea: An Alternative History of Portugal and the Portuguese*,⁹ includes a comprehensive segment on the Caribbean and im-

1979); João Adriano Ribeiro, *Madeira's Emigration to St. Vincent's Island in Antilles* (Funchal: Editorial Calcamar, 2006); and Mark de Silva, *An Historical Overview of the Madeiran Portuguese in St. Vincent and the Grenadines*, revised edition (Kingston: M. Da Silva, 2020). For Bermuda see Patricia Mudd, *Portuguese Bermudians: Early History and Reference Guide, 1849-1949* (Louisville, Ky: Historical Research Publishers, 1991); and Anna Faria, "Life on a Shelf: The Silencing and Immobilizing of a People," MA Thesis (Mount Saint Vincent University, 2001). For Antigua, see Susan Lowes, "The Peculiar Class: The Formation, Collapse, and Reformation of the Middle Class in Antigua, West Indies, 1834-1940," PhD diss. (Columbia University, 1994).

³Guyana gained independence in 1966. For this paper, Guyana will be used primarily.

⁴Laurence, "Immigration into Trinidad and British Guiana, 1834-1871," 77-109.

⁵Laurence, *Immigration into the West Indies in the 19th Century*; Laurence, *A Question of Labour: Indentured Immigration into Trinidad and British Guiana, 1875-1917* and K. O. Laurence, "The Evolution of Long-Term Labour Contracts in Trinidad and British Guiana 1834-1863," *The Jamaica Historical Review* 5 (November 1965), *passim*.

⁶Jo-Anne Ferreira, "Madeiran Portuguese Migration to Guyana, St. Vincent, Antigua and Trinidad: A Comparative Overview," *Portuguese Studies Review* 14 (2) (2006/7): 63-85.

⁷Menezes, *The Portuguese of Guyana*; Ciski, "The Vincentian Portuguese"; and Lowes, "The Peculiar Class."

⁸See an extensive study on the Portuguese in Trinidad and Tobago in Ferreira, *The Portuguese of Trinidad and Tobago*.

portant references to writings by Menezes, Laurence, Ferreira, Vieira et al.¹⁰ E. Alpers and M. Ball reviewed the scholarly literature on the Portuguese in the diaspora and included references to the Portuguese in the Caribbean.¹¹

This paper further adds to the discourse on the Portuguese in the Caribbean, in a historical context, from the nineteenth century. In addition to Trinidad, Guyana, St. Vincent, and Antigua, the discussion also includes Grenada, Bermuda, and St. Kitts. This research reviews the Portuguese in all the territories identified and discusses their arrival and settlement, as well as segments on inter-country communication and travel in the Caribbean, religion and cultural references, among other areas. The research is grounded in the nineteenth century and includes contemporary references. The statistics for Bermuda, Guyana, and Trinidad and Tobago, up to 2010, 2011 and 2012 respectively, have also been incorporated into the study.¹²

Introduction

Portuguese from Madeira, the Azores, and Cape Verde Islands ventured to the Caribbean from the mid 1830s primarily to work on the plantations as indentured labourers and other contracted workers. Others fled Madeira in the 1840s to escape religious persecution and later on, even more journeyed to join their relatives and friends in the Caribbean. Prior to this, Portuguese settlement in the Caribbean is noted in the sixteenth century. Sephardim

⁹Malyn Newitt, *Emigration and the Sea: An Alternative History of Portugal and the Portuguese* (Oxford: Oxford University Press, 2015), 169-176.

¹⁰Menezes, *The Portuguese of Guyana*; Laurence, *Immigration into the West Indies in the 19th Century*; Ferreira, "Madeiran Portuguese Migration to Guyana, St. Vincent, Antigua and Trinidad," 63-85; and Alberto Vieira, "Migration from the Portuguese Islands in the Second Half of the Nineteenth Century: The Case of Madeira," in David Higgs, ed., *Portuguese Migration in Global Perspective* (Ontario: The Multicultural History Society of Ontario, 1990), 42-58.

¹¹Edward A. Alpers and Molly Ball, "Portuguese Diasporas: A Survey of the Scholarly Literature," in E. Morier-Genoud and Michel Cahen, eds., *Imperial Migrations: Colonial Communities and Diaspora in the Portuguese World* (London & New York: Palgrave Macmillan, 2012), 50.

¹²This paper relies on both archival and secondary sources as well as interviews with relevant persons. Portuguese women have been instrumental in business, they have led and participated in cultural and religious activities among other aspects. Their contributions over the years have been tremendous and should be treated as a separate study to engender the history of the Portuguese women in the Caribbean. For this reason this paper does not cover this aspect.

Portuguese started arriving in Jamaica after the 1530s.¹³ In other territories in the Caribbean, "... by the 1660s there were Jewish settlements in Cayenne, Surinam (Dutch Guiana), Essequibo (British Guyana (*sic*)), Curaçao, Barbados and other smaller islands."¹⁴ While in Guyana, evidence of the presence of the early Portuguese settlers is visible on the island of Kyk-over-al,¹⁵ the early Dutch settlers found the ruins of a fort which contained an arched gateway which bore the coat of arms of the Kingdom of Portugal.¹⁶ A second account of their presence was circa 1654 when Portuguese Jews ventured from Brazil and set up plantations in the Pomeroun¹⁷ in Guyana.¹⁸ In Trinidad, Eric Williams contended that there were Sephardic Jewish communities from the 1630s,¹⁹ while Anthony de Verteuil dates the first major

¹³Mordechai Arbell, *The Portuguese Jews of Jamaica* (Kingston: Canoe Press, University of the West Indies, 2000), 8.

¹⁴Arbell, *The Portuguese Jews of Jamaica*, 3.

¹⁵Kyk-over-al is an island in the Essequibo river in Guyana at the junction of the Cuyuni and Mazaruni rivers. The name of the island refers to the strategic geographic location, as it signalled the tactical advantage which the fort on this island would represent in the formation and defense of the colony. Historically it was also spelt as Kijk-over-al which means 'see or look over all'. Cecil Clementi, *A Constitutional History of British Guiana* (London: Macmillan, 1937), 14. See also P. M. Netcher, *History of the Colonies: Essequibo, Demerary and Berbice. From the Dutch Establishment, to the Present Day* (Utrecht: Provincial Utrecht Society of Arts and Sciences, 1888), 18-20; Mohammed Shahabuddeen, *Constitutional Development in Guyana 1621-1978* (Georgetown: Guyana Printers Limited, 1978), 24-27; Charles Alexander Harris, Laurens Storm Van's Gravesande and John Abraham Jacob de Villiers, *Storm van's Gravesande: The Rise of British Guiana, Compiled from his Despatches by C. A. Harris and J. A. J. de Villiers*, vol. 1 (London: The Hakluyt Society, 1911), 10-27; and Bram Hoo-rnhout, *Borderless Empire. Dutch Guiana in the Atlantic World, 1750-1800* (Athens, GA: Georgia University Press, 2020), 6.

¹⁶A. R. F. Webber, *Centenary History and Handbook of British Guiana* (Georgetown: "The Argosy" Co., 1931), 7.

¹⁷The Pomeroun extends in Guyana from the Cayuni / Mazaruni in Region 7 to the Atlantic Ocean. See *Gazetteer of Guyana* (Georgetown: Lands and Surveys Department, 2001), 230.

¹⁸James Rodway and Royal Agricultural and Commercial Society of British Guiana, *Handbook of British Guiana* (Georgetown, British Guiana, 1893), 83. The move from Brazil to the Pomeroun, Guyana was as a result of the ongoing strife between the Dutch and the Portuguese in Brazil from the early 1620s. See Mark Meuwese, *Brothers in Arms, Partners in Trade: Dutch-Indigenous Alliances in the Atlantic World, 1595-1674* (Leiden & Boston: Brill, 2012), 32-37.

¹⁹Eric Williams, *The History of the People of Trinidad and Tobago* (Port of Spain: P.N.M. Publishing Co. Ltd., 1962), 20.

Jewish settlement from the late 1700s,²⁰ additionally, in Tobago, there was also a Jewish settlement.²¹

Economically, prior to the end of the period of African enslavement in 1834, British territories in the Caribbean faced challenges in the cultivation and export of staple commodities. In Guyana cotton production received competition from the United States of America which produced larger quantities of cotton at a lower cost.²² West Indian production of cotton went from 16.23% on the British market in 1806 to 0.12% in 1810.²³ In contrast sugar production grew and sugar came to dominate as the major export crop. Between 1814 and 1818 in Guyana, 21,770 hogsheads²⁴ of sugar were produced, and by the period 1829-1833 this had risen to 71,496.²⁵ While production levels were rising, there was a fall in the price of sugar after 1815. Thereafter a series of events affected the profitability of sugar in Guyana and the wider English-official Caribbean territories. In 1825, Mauritius sugar was offered to the British market on equal terms with the British Caribbean sugar. By 1832, West Indian planters, through the publication *The Courier*, were calling for a loan of £10-20 million to planters²⁶ and by 1836, sugar duties were placed on the same footing as those produced in the 'East and West Indies.'²⁷ Therefore the profits exacted from the sugar plantations in the British Caribbean continued to reduce. While changes occurred in the global economy, the emancipation struggle was in its closing stages. Freedom was

²⁰Anthony de Verteuil, *Edward Lanza Joseph and the Jews in Trinidad* (Port of Spain: Litho Press, 2014), 23.

²¹Oppenheim, Samuel, "An Early Jewish Colony, Western Guiana, 1658-1666: and Its Relation to the Jews in Surinam, Cayenne and Tobago," *Publications of the American Jewish Historical Society* 16 (1907): 95-186. See also de Verteuil, *Edward Lanza Joseph and the Jews in Trinidad*. See additional discussions in Newitt, *Emigration and the Sea*, 61-68.

²²Alan H. Adamson, *Sugar Without Slaves: The Political Economy of British Guiana, 1838-1904* (New Haven: Yale University Press, 1972), 25.

²³Adamson, *Sugar Without Slaves*, 25.

²⁴A hogshead is approximately 1,568 lbs. See Keith Mason, "The World an Absentee Planter and His Slaves Made: Sir William Stapleton and His Nevis Sugar Estate, 1722-1740," *Bulletin of the John Rylands Library* 75 (1) (1993): 112.

²⁵Adamson, *Sugar Without Slaves*, 25.

²⁶James Rodway, *History of British Guiana, from the Year 1668 to the Present Time*, vol. 2 (Georgetown, Demerara: J. Thomson, 1893), 287.

²⁷Adamson, *Sugar Without Slaves*, 26.

eventually granted to enslaved Africans in the British territories via the 1833 Emancipation Act, it came into effect a year later and an apprenticeship system was put in place for a period of four years, except in the case of Antigua and Bermuda.²⁸

It was during the period of apprenticeship that the Portuguese from Madeira and the Azores arrived to work on the plantations in anticipation of the impending exit of the formerly enslaved Africans from the plantations. The planters in the English-official Caribbean territories received £20 million in compensation, approximately £200 billion in today's terms, as a result of emancipation and no financial provisions were made for the newly freed Africans.²⁹ Though the planters received compensation, there was still the question of an assured supply of labour. The planters faced the issue of the desertion of the plantations—both during and after apprenticeship, the subsequent shortage of labour and the request for higher wages. The plantocracy sought to pre-empt the anticipated shortage of labour and explored the possibility of acquiring additional labour. Guyana, like Trinidad and Jamaica, had larger unoccupied land masses than some of the other Caribbean territories which the formerly enslaved Africans could occupy away from the plantations. The planters initially sought immigrants from Europe, because it was hoped that they would increase the white population. In the sugar colonies of Dominica, Saint Lucia, St. Vincent, Grenada, Trinidad and Tobago, and Guyana, B. W. Higman noted that in 1830 the average enslaved to white population stood at 17.6 to 1.³⁰

While the planters in the Caribbean were seeking new sources of labour, Madeira was experiencing harsh economic times. Many chose to emigrate due to several mitigating factors which occurred at various intervals

²⁸“Chapter 73, An Act For the Abolition of Slavery Throughout the British Colonies; For Promoting the Industry of the Manumitted Slaves; and For Compensating the Persons Hitherto Entitled to the Services of Such Slaves [28th August 1833] In Great Britain. Parliament, 1833,” *Debates on the Resolutions and Bill for the Abolition of Slavery in the British Colonies: With the Act of Parliament* (London: Maurice and Co., 1834), 928-964; and Lewis, *Growth of the Modern West Indies*, 63.

²⁹See *The London Gazette* 10 July 1835, 19287 (London England: Robert George Clarke 1835), 1335; Beckles, *Britain's Black Debt: Reparations for Caribbean Slavery and Native Genocide*, 144, and Williams *Capitalism and Slavery*, *passim*.

³⁰B. W. Higman, *Slave Populations of the British Caribbean, 1807-1834* (Kingston: The Press University of the West Indies, 1995), 76, 105.

throughout the nineteenth century. Most notably, among these factors were the hardships caused by the Portuguese civil war of 1828–1834,³¹ the 1847 Madeiran potato famine and the grape vine diseases in 1851/1852 and 1870. The 1851/52 crisis was so devastating that by 1854 “an annual wine production of 20 million hectolitres had plummeted to just 600. Only 15 of the 70 British wine-trading companies survived.”³² In the 1850s emigration from the Cape Verde islands coincided with periods of hardship caused by droughts and famine in that territory.³³ The aforementioned disasters were all linked to agriculture and production, however, the exodus of Protestants was religious based. Dr. Robert Reid Kalley moved to Madeira in 1838 and started a Protestant church in the predominantly Roman Catholic island.³⁴ He received hundreds of converts and opened schools and clinics, Norton noted that “the people were delighted and amazed at the benevolence of Dr. Kalley, who sustained the expense of all without any compensation.”³⁵ Despite his service, Kalley faced opposition from the Madeiran authorities and his proselytizing of the Madeirans was not supported by the Roman Catholic Church.³⁶ He was forbidden from practising medicine in Madeira, threatened and was jailed in January 1844 for six months.³⁷ Kalley’s followers were also targeted; they testified that:

³¹See John Driver’s account of the conditions in Madeira in 1834, *Letters from Madeira in 1834* (London: Longman and Co., 1838), xxviii.

³²Rodney Bolt, *Madeira and Porto Santo* (Guilford, Conn.: Globe Pequot Press, 2003), 40.

³³K. David Patterson, “Epidemics, Famines, and Population in the Cape Verde Islands, 1580-1900,” *The International Journal of African Historical Studies* 21 (2) (1988): 291-313.

³⁴Herman Norton, *Record of Facts Concerning the Persecutions at Madeira in 1843 and 1846, The Flight of a Thousand Converts to the West India Islands; and Also, the Sufferings of Those Who Arrived in the United States* (New York: American and Foreign Christian Union, 1857), 12.

³⁵Norton, *Record of Facts Concerning the Persecutions at Madeira*, 13.

³⁶See Norton, *Record of Facts Concerning the Persecutions at Madeira*; Wm M. Blackburn, *The Exiles of Madeira*. (Philadelphia: Presbyterian Bd. of Publns, 1860); Robert R. Kalley, *A Short Statement of Dr. Kalley’s Case: His Expulsion from Madeira, by Outrage in Violation of the Treaty, between Great Britain and Portugal; and the Subsequent Proceedings of the British Government* (London: James Nisbet and Co., 1847); Joyce E. Every-Clayton, “The Legacy of Robert Reid Kalley,” *International Bulletin of Mission Research* 26 (3) (2002): 123-127; and William B. Forsyth, *The Wolf from Scotland: The Story of Robert Reid Kalley: Pioneer Missionary* (Darlington: Evangelical Press, 1988).

³⁷Every-Clayton, “The Legacy,” 124.

We have been driven from our houses and our country have wandered in the mountains, and slept in caves because we read the Word of God, and desired to live according to its precepts, and for no other reason. We were compelled, by the priests and the government in Madeira, to flee away, and leave all our goods, and houses, and lands.³⁸

During the years 1844-1846, Kalley's followers escaped Madeira and sought refuge in other countries including those in the Caribbean and the USA.³⁹ It was these periods of religious crises and agricultural hardship in Madeira, which led thousands to venture to the Caribbean.

Arrival and settlement

Within this segment the arrival of Portuguese to the Caribbean will be examined primarily for the nineteenth century, though Portuguese from Madeira continued to venture to the Caribbean countries into the twentieth century. In Trinidad the first group of Portuguese from Fayal, Azores arrived in July 1834 and these 41 immigrants worked on the sugar plantations.⁴⁰ Ferreira noted that these immigrants "were in fact illegal aliens in the island, secretly contracted by slave ship navigators who were used to plying the Atlantic looking for Africans to enslave."⁴¹ By the end of 1834, a total of 161 men, women and children arrived from the Azores.⁴² In October 1835, a group of laborers from the Azores petitioned the Governor of Trinidad and highlighted their plight as well as the state of their working conditions, they further noted:

That with many others of their countrymen, they were induced by certain evil disposed persons, under false pretences, to quit their native country, Fayal, to become agricultural labourers in this Colony. Of the whole number thus cajoled, one third only are still in existence.⁴³

³⁸Norton, *Record of Facts Concerning the Persecutions at Madeira*, 209.

³⁹Blackburn, *The Exiles of Madeira*, 129.

⁴⁰See Laurence, "Immigration into Trinidad and British Guiana, 1834-1871," 104; and Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

⁴¹Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

⁴²Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

⁴³Petition to the Lieutenant-Governor of Trinidad, 1 October 1836, quoted in Eric Williams, *The History of the People of Trinidad and Tobago* (Port of Spain: P.N.M. Publishing Co. Ltd., 1962), 98; and Studholme Hodgson, *Truths from the West Indies: Including a Sketch of Madeira in 1833* (London: W. Ball, 1838), 222.

From Madeira, a small number of Portuguese ventured to Trinidad in 1834, twenty-eight left on 12 November aboard the ship *Stralbista*; sixteen ex-prisoners aboard the ship *Éweretta* on 23 November 1834, while in February 1835, thirty-two Madeirans ventured to Trinidad on the ship *Portland*.⁴⁴ Eric Williams contended that some persons did arrive from Madeira in 1839, however there are no known statistics of this.⁴⁵ It was not until 1846-1847 that 1,298 Madeirans officially immigrated to Trinidad.⁴⁶ It should be noted that prior to 1846 clandestine immigration may have occurred.⁴⁷

In the early years, the contracts were for three to five years.⁴⁸ Laurence noted that immigration sought to fill the “actual or expected shortage of labour ...”⁴⁹ on the plantations, as foreseen by the planters after the period of apprenticeship ended. However, for the planters, Laurence quite rightly argued that it was also a counteractive strategy to keep the prices of wages down by having the immigrants compete with the formerly enslaved Africans. The first group of Madeirans who ventured to Trinidad under contract, worked on the sugar plantations, while others were employed on coffee and cocoa estates.⁵⁰ After their contract period ended, they undertook new posts as gardeners and domestic servants while others ventured into business.⁵¹

Of the Protestant exiles from Madeira, on 9 May 1846, a group of 219 persons who were followers of Kalley, arrived in Trinidad on the ship *Barque Senator*. Subsequent groups of Protestant Madeirans followed from September to November 1846 and while the definitive number of exiles that fled to Trinidad is unknown, it is estimated that approximately 600-800 Protestant Madeirans had arrived in Trinidad by the late 1840s.⁵² Throughout the nine-

⁴⁴Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

⁴⁵Williams, *The History of the People of Trinidad and Tobago*, 97.

⁴⁶See Laurence, “The Evolution of Long-Term Labour Contracts in Trinidad and British Guiana 1834-1863,” *passim*.

⁴⁷See Vieira, “Migration from the Portuguese Islands in the Second Half of the Nineteenth Century,” *passim*.

⁴⁸Laurence, *Immigration into the West Indies*, 9.

⁴⁹Laurence, *Immigration into the West Indies*, 7.

⁵⁰Laurence, “Immigration into Trinidad and British Guiana,” 86-87 and Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

⁵¹Laurence, “Immigration into Trinidad and British Guiana,” 88-89 and Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

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Portuguese in business

Within each territory focused on in this study, members of the Portuguese community sought to engage in commerce. In Guyana, preparation for leaving the plantations and venturing into shop keeping were at times combined. Mr. Jones, a plantation owner, commented that indentured immigrants on the plantations were opening shops on the estates where they worked.¹⁷⁸ By 1862 James Crosby the Immigration Officer in the colony stated that he regretted that “there is a very great disinclination on the part of the Proprietors and Attorneys of Estates to take Portuguese Immigrants, on account chiefly of their facility in deserting from the Estates on which they may be located.”¹⁷⁹ This was echoed in 1841 by Governor Light, who declared that the Portuguese “were not a profitable race of labourers”¹⁸⁰ because they soon moved off the plantations, depriving the colony of much needed labour and into merchandising entrepreneurial activities.¹⁸¹ Some deserted the plantations while other sought to commute their period of indentureship. They generally started as hucksters, this term in British Guiana referred to itinerant vendors of manufactured goods, often sold from door to door.¹⁸² The Portuguese immigrants then progressed to shop keeping and the ownership of merchant stores, rum shops and larger investments.¹⁸³

The first documented Portuguese shopkeepers in Georgetown were Manuel Taxeira, Joseine Taxeira, John Perreira, and Francis Anthonio.¹⁸⁴ According to the 1841 national census records, these immigrants were all nat-

¹⁷⁸“Minutes of the British Guiana Combined Court,” 27 June 1860, *Colonist* (29 June 1860).

¹⁷⁹Letter from James Crosby to William Walker, enclosed in Governors’ Dispatch, 414, 25 April 1862, NAG.

¹⁸⁰Rodway, *The Story of Georgetown* [1920] (Georgetown: Guyana Heritage Society, 1996 [reprint]), 55.

¹⁸¹See the works of M. N. Menezes, K. O. Laurence, Brian Moore, Michael Wagner and Khalleel Mohamed.

¹⁸²See Wagner, “Structural Pluralism and the Portuguese”, 123 and Glenn Phillips, “The Changing Role of the Merchant Class in the British West Indies 1834-1867,” PhD Thesis (Howard University, 1978), 335.

¹⁸³Rodway and Royal Agricultural and Commercial Society, *Handbook of British Guiana*, 34.

¹⁸⁴See the “1841 Census, Register of the Population of the Wards of the City of Georgetown, No. 10 and 11, Comprising the Districts of Werk en Rust, Freeburg and Charles-Town and New Charles-Town,” AK I 9, NAG.

ives of Madeira. Joseine Taxeira and Francis Anthonio were listed as between the ages of 20-30 years and Manuel Taxeira and John Perreira both between 30 and 40.¹⁸⁵ No further records have been unearthed of these early entrepreneurs. In 1843, the first shipping vessel, the *Zargo* arrived in Demerara from Madeira—a brigantine, it was chartered for \$1,900.00.¹⁸⁶ The main goods imported on this maiden voyage were wine and food of various sorts.¹⁸⁷ Though the Portuguese were advancing in the field of shop keeping, they did not monopolise the field of huckstering, for the period July 1844 to February 1845, of the 800 huckster licenses issued, 324 were to the Portuguese.¹⁸⁸ By 1852, the Portuguese only held 238 of the 618 huckster licenses in Demerara and Essequibo.¹⁸⁹ It was therefore in the areas of shop keeping and merchant stores that they would make their mark.

Having made their riches, some of the Portuguese returned to Madeira and as early as 1843, ninety-one journeyed to their homeland with large sums.¹⁹⁰ This trend continued, in 1850, a ship stopped in Bermuda on its return journey to Madeira from Guyana with several persons who had “acquired considerable wealth in Demerara, and are returning to Madeira to enjoy the fruits of their industry.”¹⁹¹ Within Georgetown, Portuguese businesses continued to grow at a rapid pace. In 1869, 82.6% of the total number of businesses were Portuguese-owned, while in 1876, 70% and in 1878, 73.8%.¹⁹² These successes encouraged other Madeirans to venture to British Guiana to seek their own fortunes. By 1893, the Portuguese owned property valued at \$1,938,370.00 in Georgetown.¹⁹³ This is in comparison to \$4,611,575.00 in property owned by Europeans and Creoles (those persons of African descent and of mixed heritage); \$101,930.00 by East Indians and

¹⁸⁵1841 Census, *Register of the Population of the Wards of the City of George-Town*.

¹⁸⁶*Royal Gazette* (3 October 1843).

¹⁸⁷*Royal Gazette* (3 October 1843).

¹⁸⁸Wagner, “Structural Pluralism and the Portuguese,” 177.

¹⁸⁹See Mohamed, “Planter Patronage,” 45 and Webber, *Centenary History*, 228.

¹⁹⁰Brian L. Moore, “Social and Cultural Complexity in British Guiana, 1850-1891,” PhD Thesis (University of the West Indies, 1970), 143.

¹⁹¹*The Royal Gazette, Bermuda* (14 May 1850), 2.

¹⁹²*The Official Gazettes of British Guiana*, 1869, 1876-78, NAG.

¹⁹³Rodway and Royal Agricultural and Commercial Society, *Handbook of British Guiana*, 21.

\$45,750.00 by the Chinese.¹⁹⁴ In the nineteenth century, there were tensions between the Portuguese and the other inhabitants of the colony. This resulted in the 1856 Angel Gabriel riots and the 1889 Cent Bread riots.¹⁹⁵ Theoretically, Brian Moore contended that the Portuguese were brought as a buffer class. He noted that the “Portuguese labouring population would create an industrious buffer group between the dominant whites and the ex-slaves who would be depended upon to buttress the perpetuation of white supremacy in the colony in the interest of race.”¹⁹⁶ As the Portuguese were not accepted into the white ruling class, their success in business effectively placed them as a buffer within the colonial hierarchy of British Guiana.

As their businesses expanded, business partnerships were formed, in part to facilitate growth. This resulted in the emergence of a variety of business partnerships. Entering into partnerships was so entrenched that by 1898, 72% of Portuguese businesses were engaged in such arrangements.¹⁹⁷ Simultaneously, they diversified their businesses, venturing into the felling of timber, ownership of saw mills, the production of chocolates, rum and the ownership of hotels. The proposed advocacy association for the Portuguese businesses in Guyana suggested in the late 1890s, never came to fruition. As such, no known formal (registered) organisation was established by the Portuguese, which would have sought to further their mutual business interests. Instead, whenever an issue of grave importance emerged, individual Portuguese business owners or a group of merchants would petition the Governor advocating their position, a practice that continued into the twentieth century.¹⁹⁸

¹⁹⁴Rodway, *Handbook of British Guiana*, 21.

¹⁹⁵Moore, “Social and Cultural Complexity in British Guiana, 1850-1891”, 154. See also the “Report of the Commission Appointed to Assess Claims for Losses Sustained During the Riots in the City of Georgetown in March 1889”, *Minutes of the Court of Policy of British Guiana*, 10 August 1889, ABI 4791889, NAG; and Menezes, *The Portuguese of Guyana*, 180-190.

¹⁹⁶Brian L. Moore, “The Social Impact of Portuguese Immigration into British Guiana after Emancipation,” *A Journal of Latin American and Caribbean Studies* 19 (December 1975), 4.

¹⁹⁷*The British Guiana Directory and Almanack, 1898* (Georgetown: C.K. Jardine, 1898), 255-270

¹⁹⁸It should be noted that for the early Portuguese business persons in the 1840s the country of origin would have been Madeira. However, by the late 1850s, some may have been born in Guyana. Therefore, by the end of the nineteenth, due to the large population

In Trinidad, when the periods of their contract came to an end on the sugar, coffee, and cocoa plantations, many Portuguese immigrants went on to work as gardeners, servants and shopkeepers.¹⁹⁹ Within the arena of business, the first known Portuguese-owned shop was opened in 1846.²⁰⁰ From small shop owners, the Portuguese in Trinidad had by the end of the nineteenth century expanded their businesses to include rumshops, bakeries, winemaking, an ice-cream parlour and the manufacture of carbonated beverages,²⁰¹ “the rum sold in these shops were usually brewed and blended by the shopkeepers themselves.”²⁰² In comparing Portuguese businesses in nineteenth century Guyana and Trinidad, it was suggested that in Trinidad the “impressive achievements may be traced to their frugal and enterprising nature”²⁰³ while in Guyana, initially, the Portuguese were assisted by the British merchants who provided favourable conditions.²⁰⁴

Contemporarily, a few of the businesses in Trinidad that were previously Portuguese owned include J. B. Fernandes, rum manufacturers—this company by 1970 controlled 85% of the national rum market (currently it is owned by Angostura Limited) and Hi-Lo Food Stores Limited, which was previously owned by Fernandez (1933) Limited.²⁰⁵ Current Portuguese owned businesses include Ferreira Optical Limited and A. de Freitas’s Camacho Green Grocers and Meat Shop.²⁰⁶ In 2018, Joseph Fernandes opened the Cazabon Wine and Cocktail Bar, a restaurant in the capital city of Port of Spain, with Portuguese dishes included on the menu.²⁰⁷

of Portuguese in Guyana and those who engaged in business, whether as hucksters, higglers, shopkeepers or manufacturers, it cannot be stated definitively for all the businesses whether they were owned by those born in Madeira / The Azores / Cape Verde or whether they were of Portuguese descent.

¹⁹⁹Laurence, “Immigration into Trinidad and British Guiana,” 88-89 and Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

²⁰⁰Laurence, “Immigration into Trinidad and British Guiana,” 88.

²⁰¹Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 3.

²⁰²Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 3.

²⁰³Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 2.

²⁰⁴*Royal Gazette* (26 September 1843), The British Library.

²⁰⁵Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 2.

²⁰⁶Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 2.

²⁰⁷Joan Rampersad, “Wine at a ‘Good House,’” *Trinidad and Tobago Newsday*, 26 January 2019, <https://newsday.co.tt>.

The Portuguese immigrants in St. Vincent in the nineteenth century, after the period of indentureship ended, worked both on the plantations and in shop keeping and trading. The majority sought not to renew their contracts and moved into other ventures.²⁰⁸ Those in the rural areas were often promoted as foremen and overseers, earning a larger remuneration.²⁰⁹ Ciski contended that “the Portuguese have generally proceeded to occupy a middle economic class position as petty landowners and entrepreneurs.”²¹⁰ The early businesses were primarily located in the rural areas but later they expanded to the capital, Kingstown.²¹¹ As in Guyana and Trinidad, the Portuguese shops was located on the same premises as the family home and the family assisted in the operation²¹², selling goods such as “salt pork and salt fish; rum, gin and porter (sic); flour and meal; and a miscellany of oil, tobacco, candles, and further daily necessities.”²¹³ By the early 1860s, there was growing dissatisfaction among the labouring classes with the ruling classes. The Portuguese immigrants, who were increasing in wealth, were on the receiving end of some of this resentment. It culminated in 1862 in the ‘Vox Populi’ riots, in which Estate shops, Portuguese shops and manager’s houses in Evesham Vale and Mesopotamia were looted.²¹⁴ In the twentieth century, though a small community, a few persons of Portuguese descent continued to engage in entrepreneurial activities. Prominent business persons included Sir Philip Henry Veira and Sylvester De Freitas.

Sylvester De Freitas was reportedly born in Guyana in 1892 and moved to Trinidad as a child. In 1921 he migrated to St. Vincent, where he built a large group of companies.²¹⁵ He operated the:

²⁰⁸Ciski, *The Vincentian Portuguese*, 54.

²⁰⁹Kenneth John, “The Portuguese Connection,” *The Vincentian*, 7 February 1997, <http://thevincentian.com/the-portuguese-connection-p1968-108.htm>

²¹⁰Ciski, *The Vincentian Portuguese*, 1. See also de Silva, *An Historical Overview of the Madeiran Portuguese in St. Vincent*, 5.

²¹¹Ciski, *The Vincentian Portuguese*, 25.

²¹²Ciski, *The Vincentian Portuguese*, 70. See also Menezes, *The Portuguese of Guyana*, 15-56.

²¹³“1862 Shop Inventory,” quoted in Ciski, *The Vincentian Portuguese*, 70.

²¹⁴See Ciski, *The Vincentian Portuguese*, 70 and Woodville Marshall, “‘Vox Populi’: The St. Vincent Riots and Disturbances of 1862,” in B. W. Higman, ed., *Trade, Government and Society in Caribbean History, 1700-1920: Essays Presented to Douglas Hall* (Kingston: Heinemann Educational Books (Caribbean) Ltd., 1983), 85.

Only cinema on the island, a restaurant, a motor vehicle shed, a mechanic station, a carpenter's shop, a boatbuilding facility, a small dairy and even a boxing stadium ... At one point he may have been the largest wholesale supplier of rice and flour in Kingstown. Mr. De Freitas traded in furniture, fridges, stoves and other appliances. He supplied ice to shop keepers and was the first man to bring in iceboxes. Syl was also the first to import funeral coaches and he had, much more broadly speaking, a revolutionary impact on land and sea transportation in this country.²¹⁶

De Freitas also engaged in inter-island Caribbean shipping, he owned the Indian Bay Estate and later served on the Legislative Council in St. Vincent from 1948-1951. Philip Henry Veira born in 1921, entered into business early in his life and built a successful group of companies, including supermarkets, lumberyards, hardware stores and a bakery. Veira also built a flour mill, in conjunction with other parties. He served as the Chair of the East Caribbean Flour Mills until his death in 1991.²¹⁷ His company P. H. Veira & Co. Ltd. continues his entrepreneurial endeavours in St. Vincent. Within the political arena, one of the Portuguese descendants who has attained the highest office in that country is Dr. Ralph Gonsalves, who has served as the fourth Prime Minister of St. Vincent and the Grenadines and re-elected several times.

The Antiguan Portuguese community in the nineteenth century did not initially focus on entrepreneurship. The Portuguese labourers "remained on or near the plantations, married fellow plantation workers, and gradually blended into the population."²¹⁸ The Portuguese that did pursue business, did this in the spheres of bakeries and rumshops, they also bought small

²¹⁵Luke Browne, "Entrepreneurs of St Vincent and the Grenadines – Sylvester 'Syl' De Freitas," *Searchlight* (28 February 2014), <https://searchlight.vc>.

²¹⁶Browne, "Entrepreneurs of St Vincent and the Grenadines – Sylvester 'Syl' De Freitas."

²¹⁷Luke Browne, "Entrepreneurs of St. Vincent and the Grenadines – Sir Philip Henry Veira," *Searchlight* (21 March 2014), <https://searchlight.vc/searchlight/special-features/2014/03/21/entrepreneurs-of-st-vincent-and-the-grenadines-sir-philip-henry-veira/>, and de Silva, *An Historical Overview of the Madeiran Portuguese in St. Vincent*, 8.

²¹⁸Susan Lowes, "Rum and Coca-Cola: The Arrival of the Americans and the Restructuring of Social Relations in Antigua in the 1940s," paper presented at the Antigua and Barbuda Country Conference, The University of the West Indies, Cave Hill (13-15 November 2003), <https://www.open.uwi.edu/sites/default/files/bnccde/antigua/conference/papers/lowes.html>

non-producing estates. In August 1871, of the 20 liquor licenses issued, eleven went to the Portuguese on the island while in 1878, four of the five largest bakeries were Portuguese owned.²¹⁹ One Camacho family “owned extensive estates as well as a large import-export and plantation provision firm.”²²⁰ Despite their wealth, they faced discrimination in the entrance into the Civil Service, social clubs and later job promotions. In the twentieth century, the relatively small community had largely assimilated into the Antiguan society. Within the sphere of businesses in the twentieth century, were two prominent Portuguese owned businesses, the Antigua Distillery Limited and Quin Farara and Co. Ltd.

The Antigua Distillery Limited was formed in 1932 by Portuguese rum-shop owners John R. Anjo, Joseph de Freitas, Manuel Dias, Emanuel C. Farara, Quin Farara, Emanuel Gomes, C.F. Joaquim, and John A. Vieira. They invested the initial sum of £2,500 and they later bought the Montpelier sugar factory to secure additional supplies of molasses (1940-1951), the base for rum.²²¹ Molasses was also bought from Guyana, a mark of the interconnectedness of the Caribbean.²²² Contemporarily, the company continues to produce a range of rum products, additionally, in 2020, during the Covid-19 pandemic, they diversified to include the production of hand sanitizers which were exported to Bermuda, Monserrat, Anguilla, St. Martin, Barbados, St. Kitts and Nevis.²²³ A second business is Quin Farara and Co. Ltd., founded in 1924, their entrepreneurial activities involved the manufacture of rum; they blended, bottled and sold their own rum. Over the years the company has expanded to five locations in Antigua, these include a wine and spirit showroom, a warehouse and other specialised liquor stores and services.²²⁴ In Antigua, the Portuguese community has had an impact on the business landscape of Antigua which continues to today.

²¹⁹Lowes, “Rum and Coca-Cola.”

²²⁰Lowes, “Rum and Coca-Cola.”

²²¹*A Short History of Antigua Distillery Limited*, <http://www.antiguadistillery.com/antigua-distillery-limited.html>

²²²See Susan Lowes, “Of Soldiers, Lepers, Lunatics, Rum Makers, and the History of Rat Island,” https://antiguahistory.net/uploads/3/4/3/5/34350800/forts_lepers_lunatics_rum_2019.docx.pdf and *A Short History of Antigua Distillery*.

²²³Elesha George, “Antigua Distillery Adds Hand Sanitiser To Its Production Line,” *The Daily Observer* (13 May 2020).

²²⁴Gulliver Johnson and Janie Conley, *Tablemanners: A Culinary Review of Hospitality in Antigua & Barbuda* (St. John’s: Leeward Consultant’s and Associates Ltd., 2011), 221.

After their period of indentureship ended in the nineteenth century, the Portuguese in St. Kitts generally went into shop keeping, owning small retail shops based primarily in the plantation villages and the towns.²²⁵ Richardson noted that “by 1870 the Portuguese merchants had achieved not only a measure of prosperity on St. Kitts but were accorded a degree of social prestige.”²²⁶ This entrance into business is similar to the route taken by sections of the Portuguese population in Guyana, Trinidad, Antigua, and St. Vincent from the nineteenth century onwards. While in Bermuda, the early Madeiran labourers did not move en masse into entrepreneurship as in some of the other English-official Caribbean territories, but were described in the 1850s as having “acquired a certain degree of economic stability.”²²⁷ While the Portuguese inhabitants of Bermuda in the nineteenth century were largely agriculturalists, there were a few noted exceptions that entered into business. In the late 1850s George Faustin De Silva acquired considerable property and his estate was considered by 1860 “the 19th highest assessment in Devonshire Parish”²²⁸ while in 1878 Nicholas de Grella advertised his business as a clothes renovator.²²⁹ In the 1880s John Gonsalves Cabral owned a Wine and Spirit Retail shop in Hamilton.²³⁰ He later passed away circa May 1901 and claims on his estate were advertised.²³¹ These successes were however in the minority. In the latter half of the nineteenth century, the Portuguese were also owners of small grocery stores, as whalers and they were involved as volunteer firefighters.²³² Alternatively, Hayward contended that in the early 1900s the Portuguese were not knowledgeable enough to compete with trained agriculturists.²³³ As earlier noted, there was no significant presence of the Portuguese in business in the Bermuda in the nineteenth century. However, with the influx of Azoreans in the twentieth cen-

²²⁵Richardson, *Caribbean Migrants*, 96.

²²⁶Richardson, *Caribbean Migrants*, 96.

²²⁷Mudd, *Portuguese Bermudians*, 73.

²²⁸Mudd, *Portuguese Bermudians*, 75-79.

²²⁹Mudd, *Portuguese Bermudians*, 113.

²³⁰Mudd, *Portuguese Bermudians*, 121

²³¹“Notice, Estate of John Gonsalves Cabral,” *The Royal Gazette, Bermuda* (1 June 1901) 2.

²³²Mudd, *Portuguese Bermudians*, 113-114, 132.

²³³Walter B. Hayward, *Bermuda Past and Present* (New York: Dodd, Mead & Company, 1910), 224.

tury this community maintained its linkages and expanded into various businesses. It is important to note the business interests and the preservation of their culture in Bermuda in the twentieth and twenty-first centuries is comparable to the Portuguese in Guiana in the second half of the nineteenth century.

Throughout the English-official Caribbean territories of Guyana, St. Vincent, St. Kitts, Trinidad, Bermuda, Grenada, and Antigua, the Portuguese immigrants entered into business at varying stages in the nineteenth century. The majority of their business initially focused on shop keeping, the ownership of rum shops and bakeries. Over the years they diversified into a myriad of businesses including manufacturing, hotel ownership, lumberyards and gold and diamond mining. Contemporarily, their presence in the realm of business, though greatly reduced, is still visible in the majority of each the territories reviewed.

Inter-country communication, travel and the Portuguese

The Portuguese immigrants in the English-official Caribbean moved between these territories since their arrival in the nineteenth century. As their migration was often financially motivated, they relocated in order to seek employment in territories with higher wages, engage in business in a more prosperous territory, while others sought to reunite with family members. An interesting public acknowledgement of communication between the Portuguese in the various Caribbean territories in the nineteenth century was the list of unclaimed letters published in the newspapers of the day and other official colonial documents such as the *Official Gazettes*.²³⁴ In April 1841, an unclaimed letter for Mr. J. A. De'Sousia was included in the list of unclaimed letters held at the British Guiana Post Office in Georgetown.²³⁵ With the large number of Portuguese immigrants in Guyana, provisions were made as early as September 1841 for letters to be transmitted to Madeira every three months, the Agent-General for Immigration, James Hackette instructed that:

All persons having Portuguese Labourers in their employ, are therefore requested to make this arrangement known to them, and to afford them the requisite

²³⁴See discussions on postal history in M J. Daunton, *Royal Mail: The Post Office Since 1840* (London: Bloomsbury Academic, 2015).

²³⁵*The Royal Gazette of British Guiana*, CO 115 (5), XXXVI, 20 April 1841, 2, TNA.

facilities in sending their letters to this office in order that they may be forwarded accordingly.²³⁶

The new arrangement ensured that letters were forwarded to their relations in Madeira, and as such there was no further mention of Portuguese in the official list of unclaimed letters until 1861 (there was one exception in 1846 when a letter to Mr. S. Gomas was listed).²³⁷ Despite this extraordinary arrangement, persons travelling from Madeira would still bring letters to Guyana. In 1860, Ordinance No. 2 was enacted to establish the Colonial Post Office in Guyana.²³⁸ With this ordinance, a few exemptions were made, for the transportation of letters, these included allowing persons to bring into the colony private letters as well as:

Letters of merchants, owners of vessels of merchandize, or by any person employed ... or by any person employed by such owner for the carriage of such letters ... without paying or receiving hire or reward, advantage or profit, from the same in any wise.²³⁹

This allowed the Portuguese merchants and owners of vessels to transport letters to the colony in addition to the special arrangements made in 1841. During this time, the delivery of mail in the Caribbean relied largely on the Imperial postal system and other ship arrivals. By 1862 an ordinance was enacted to facilitate the collection of Inter-Colonial Postage in the West Indian Colonies, thereby providing greater organisation for this public service.²⁴⁰ From the early 1860s, there were increasing notices for unpaid letters for members of the Portuguese community in Guyana, not only to those in Madeira but to other Caribbean territories. In 1861, notices included the following letters for Laurence Pereira domiciled in Guyana to Joze Pereira of Antigua; and John Rodrigues of Guyana to Mrs. Hendrea Don Car Do Son of Grenada.²⁴¹

²³⁶*The Gazette and General Advertiser of British Guiana*, CO II5 (5), Vol XXXVI, 7 August 1841, I, TNA

²³⁷*The Royal Gazette of British Guiana*, CO II5 (13), LXX 2 September 1846, TNA, 1213.

²³⁸This Ordinance was enacted on 8 January 1860 and came into operation on 2 May, 1860.

²³⁹Section 6, Ordinance 2 of 1860, "An Ordinance to Establish a Colonial Post Office" [British Guiana].

²⁴⁰Ordinance No. 16 of 1862 [British Guiana], "An Ordinance to Facilitate the Collection of Inter-Colonial Postage in the West India Colonies".

²⁴¹*The Official Gazette of British Guiana*, A (22), LXXVI 21 September 1861, NAG, II50.

Additional postal legislation was put in place in Guyana by 1866, that detailed the offences against the Post Office including the delivery of letters and packages²⁴² these new stipulations affected in part, the Portuguese immigrants. In May 1867, Francisco Marques was charged with four counts of bringing letters into the colony from Madeira. It was not stated explicitly whether he requested payment for the delivery of the letters or not, but this may have happened, as he was subsequently convicted and was required to pay \$96, it was noted that “in default of payment, he was committed to prison.”²⁴³ From September 1877, the Portuguese letters were listed separately from the general population, there were 36 paid letters and 82 unpaid letters for Portuguese, unfortunately, the country of origin was not stated.²⁴⁴ This trend continued, the June 1887 notices of the *Official Gazettes of British Guiana* included paid and unpaid letters to Portuguese in Guyana from persons in Trinidad, Suriname, Madeira and New York, USA.²⁴⁵ This continued into the twentieth century with notices for the collection of paid letters for the Portuguese sent from the English-official Caribbean territories as well from Cuba, Manchester (UK), London (UK) and New York (USA), thereby signalling the further migration from the Caribbean of this grouping.²⁴⁶

The publication of unclaimed letters was also repeated in the newspapers of other English-official Caribbean countries. In Bermuda the list of unclaimed letters was published in *The Royal Gazette Bermuda Commercial and General Advertiser and Recorder*, the Portuguese unclaimed letters were originally included in the general published listing. However in 1894 and from thereon, a separate list was created for the Portuguese, however, the country of origin was not included in the listing and as such the inter-country communication (other than their home countries of Madeira, The Azores, and Cape Verde) cannot be verified.²⁴⁷

²⁴²Ordinance No. 9 of 1866 [British Guiana], “An Ordinance to Provide for the Punishment of Offences against the Post Office” [1st July, 1866].

²⁴³Francisco Marques arrived from Madeira on the brig *Freitas Ermaos* in May 1867. See the report in *The Creole* (6 May 1867), The British Library.

²⁴⁴*The Official Gazette of British Guiana*, A (49), LXXIX 17 September 1877, NAG, 1620-1621.

²⁴⁵*The Official Gazette of British Guiana*, A (64), 5(47) 11 June 1887, NAG, 977.

²⁴⁶*The Official Gazette of British Guiana*, A (103), XXIV 25 July 1906, NAG, 195-196.

²⁴⁷See the issues of the *The Royal Gazette, Bermuda* and Mudd, *Portuguese Bermudians*, 427-490.

Since the arrival of the first groups of Portuguese labourers in the 1830s in the Caribbean, their presence has been noted in the newspapers of the day within each territory. As with the unclaimed letters, this information was also reprinted in the various newspapers across the Caribbean and further afield.²⁴⁸ In the early years, the news reports included updates on the immigration system in the various Caribbean territories, the legislation enacted as well as the immigration reports which highlighted the conditions of the immigrants. In the mid to late nineteenth century, reports on riots and fires were included, as well as tales of success. These news reports may have influenced at times, the introduction of Portuguese in the other territories. In Bermuda a newspaper article suggested the introduction of labourers from Madeira based on the Guyana immigration system.²⁴⁹

While instances of communication are noted, there are no reliable statistics on the movement of Portuguese immigrants between the English-official Caribbean countries in the nineteenth century.²⁵⁰ Notices from the British Guiana Colonial Registrar's Office alerted the citizenry of the colony, of the imminent departure of persons from the colony, under a segment titled 'persons intend quitting the Colony' in the local press. From the 1840s onward, Portuguese were included in this segment, *The Royal Gazette of British Guiana* included notices for the departure of Manuel De Costa and Antonio Ferreirara Macicae as early as 2 August 1842.²⁵¹ However, in many instances the destinations were not included. The few glimpses indicate their outward movement from the colonies. Snippets are also found in the literature of persons being enticed from one colony to the other, such was the case in July 1847, in which Portuguese immigrants in St. Kitts and Nevis were per-

²⁴⁸See *The Colonist (Guyana)* and *The Royal Gazette of British Guiana*, the *Port of Spain Gazette (Trinidad and Tobago)*, *The Royal Gazette Bermuda Commercial and General Advertiser and Recorder*, *Grenada Free Press*, *St. Vincent's Gazette*, *St. Kitt's Gazette* and the *Antigua Observer* for those Caribbean territories under review in this chapter,

²⁴⁹*The Royal Gazette, Bermuda* (24 August 1847), 2. Conversely in Madeira, the nineteenth century newspaper reports often dissuaded Madeirans from leaving the island as labourers, see Vieira, "Migration from the Portuguese Islands in the Second Half of the Nineteenth Century", *passim*.

²⁵⁰Bonham Richardson, "Caribbean Migrations, 1838-1985," in Franklin W. Knight and Colin A. Palmer, eds., *The Modern Caribbean* (Chapel Hill: University of North Carolina Press, 1989), 206.

²⁵¹*The Royal Gazette of British Guiana* (6 August 1842) CO I15 (6), TNA.

sueded to go to Trinidad with the promise of higher wages.²⁵² In 1862, during a particularly tense time in Guyana, approximately 20-40 Portuguese reportedly emigrated to the Caribbean islands.²⁵³

Contemporarily, individual genealogical research projects as well as recollections of family history yield examples of inter-country movement. An example of this is the research findings of Christine Jolliffe who documented the travels of her great uncle Joseph (José) Florenco who was born on 18 September 1875 in Madeira. Joseph's father, António, also Madeiran, had migrated to Antigua in 1863. A widower, he later returned to Madeira and remarried. António then travelled to Antigua and Guyana with his family and by 1875, he once again moved to Madeira and then back to Guyana. Joseph and his family finally settled in the USA in 1928.²⁵⁴

Mark de Silva, in discussing St. Vincent and the Grenadines, highlighted that of the group of Madeiran Portuguese that arrived in January 1846, "many soon escaped the deplorable living conditions and fled to other islands, particularly St. Kitts."²⁵⁵ These movements continued into the twentieth century.

Curtis Gomes in recollecting his family history in Antigua noted that his grandfather Joseph Gomez²⁵⁶ born in 1890 in Antigua moved with his family in 1902 to Trinidad and Tobago and from there migrated to the USA in 1908.²⁵⁷ He further noted that there were family connections between the Portuguese communities in Antigua and St. Kitts.

Silvestre Simao de Freitas a prominent businessman in Guyana was born in Madeira in 1876 and moved with his parents to Guyana circa 1888.²⁵⁸ He later started his own sawmilling venture and became a successful entrepreneur.

²⁵²The Portuguese of the West Indies, "St. Vincent," *Port of Spain Gazette* (20 July 1847), 3.

²⁵³It was not known to what Caribbean islands these Portuguese immigrants fled to. See "Meeting at Victoria," *Creole*, 1 April 1862, The British Library.

²⁵⁴Christine Jolliffe, *Joseph Florenco: A Family Tale Examined*, M3-D6A Migration (Post-graduate Diploma Paper, University of Strathclyde, 2020), 19-30.

²⁵⁵de Silva, *An Historical Overview of the Madeiran Portuguese in St. Vincent*, 5.

²⁵⁶Curtis Gomes noted that his grandfather changed the spelling of his surname from Gomes to Gomez when he moved to the USA. Curtis chose to revert to the original spelling of his family surname- Gomes. Curtis Gomes in discussion with the author, 21 January 2021.

²⁵⁷Curtis Gomes in discussion with the author, 21 January 2021.

eur.²⁵⁹ On 19 July 1928, he was appointed Portuguese Consul in Guyana²⁶⁰ and several decades later S. S. de Freitas returned to Madeira where he passed away in 1963.²⁶¹ His grandson, John Simon de Freitas, born in Guyana in 1940, also served as Honorary Portuguese Consul in Guyana from 1992 until 2001. At the end of his tenure for his distinguished service, John Simon de Freitas was awarded the Comendador da Ordem do Mérito from the then President of Portugal, Jorge Sampaio. He later migrated permanently to Madeira with his wife Dianne de Freitas.²⁶² Other descendants of Silvestre de Freitas also migrated to and settled in the Caribbean, UK, USA, Canada, Madeira, Spain, Australia, and New Zealand in the twentieth century.²⁶³

Genealogical searches and family recollections therefore provide glimpses into the movement of persons throughout the Caribbean and further afield in the nineteenth and twentieth centuries where official data is not always available.²⁶⁴ Both the unclaimed letters published in local newspapers and the reported instances of inter-country migration within the Caribbean in-

²⁵⁸John de Freitas and Joanne Collins-Gonsalves, "John Simon de Freitas: A Brief Survey of His Life" (unpublished manuscript, June 2011), PDF file, 6.

²⁵⁹*The Argosy Handbook of British Guiana and Directory for 1909* (Georgetown: "The Argosy" Co. Ltd., 1909 [University of Guyana Library]), 282.

²⁶⁰Consular Notice No. 312, 7 September 1928, *The Official Gazette of British Guiana*, 8 September 1928, 627.

²⁶¹Silvestre Simao de Freitas is buried at the Sao Martinho cemetery, Funchal, Madeira. See John de Freitas and Joanne Collins-Gonsalves, "John Simon de Freitas: A Brief Survey of His Life" (unpublished manuscript, June 2011), PDF file, 6-7.

²⁶²John de Freitas and Joanne Collins-Gonsalves, "John Simon de Freitas: A Brief Survey of His Life" (unpublished manuscript, June 2011), PDF file.

²⁶³See "The Family de Freitas," <https://www.defreitas.info/index.html>; John de Freitas and Joanne Collins-Gonsalves, "John Simon de Freitas: A Brief Survey of His Life" (unpublished manuscript, June 2011), PDF file, 14; and John Simon de Freitas, in discussion with the author, 11 June 2011, Amparo, Madeira Portugal.

²⁶⁴See Christine Jolliffe, *Joseph Florenco: A Family Tale Examined*, M3-D6A Migration Étude (Postgraduate Diploma Paper, University of Strathclyde, 2020); Linda Brewster Mal-lalieu, "Tracing an Ancestor from Madeira to the West Indies," *At the Corner of Genealogy and History*, <http://cornerofgenealogy.com/>; "Family de Freitas," <https://www.defreitas.info/index.html>. This can be extended to other Caribbean genealogical searches and publications, see Stephen Cranstoun, *In My Father's House Are Many Mansions: The History of the Cranstoun's from Scotland to America* (Canada: S. Cranstoun, 2018) *et al.*

dicare the existence of relationships among the Portuguese immigrants within the Caribbean—whether for business and / or personal reasons.

Portuguese and culture

The Portuguese in Guyana in the nineteenth century strove to keep their own culture and not have it subsumed into that of the upper European class within the colony.²⁶⁵ This was in part due to the pride in their own culture as well as the non-acceptance into the social circles of the ruling classes. They kept their language for the majority of the nineteenth century, opened their own schools and included Portuguese officially as part of the curriculum. In the arena of the arts, the Portuguese immigrants brought from Madeira their love of music and instruments. Dramatic groups were formed as early as 1854, with the Girls' Orphanage being the recipient of funds raised.²⁶⁶ Menezes commented that “the Portuguese bands were very much part of the musical scene in the colony and contributed in no small way to the social entertainment of a wide cross section of the population.”²⁶⁷ Their musical inclinations were also displayed in their enthusiastic religious celebrations, within the Roman Catholic Church their masses were often termed a ‘folksy’ type of religious worship. Public concerts were held by Maria Christina de Vasconcellas and her sister Mary Amalia de Vasconcellas in the 1850s and 1860s.²⁶⁸ New bands followed, the *Primeiro de Dezembro* band was formed in 1876 and performed all over the colony. This band lasted for over two decades and at one point had approximately 30 members.²⁶⁹ Their costumes were reportedly similar to the traditional Madeiran Portuguese form of dress. Another known Portuguese band was the *Estudiantina Restauração de Demerara*, which was formed in 1892.²⁷⁰

²⁶⁵Menezes, *The Portuguese of Guyana*, *passim*.

²⁶⁶M. N. Menezes, “Portuguese Drama in Nineteenth Century British Guiana,” *Kyk-Over-Al* 40 (December 1989): 66-71.

²⁶⁷Menezes, *The Portuguese of Guyana*, 135.

²⁶⁸M. N. Menezes, “Music in Portuguese Life in British Guiana,” *Kyk-Over-Al* 39 (December 1988): 65-75.

²⁶⁹Menezes, *The Portuguese of Guyana*, 128.

²⁷⁰Menezes, *The Portuguese of Guyana*, 130, 132.

The legacy of the Portuguese and music in Guyana continued into the twentieth century with vocalists such as Frank Brazão and Esla Fernandes.²⁷¹ Of other initiatives, Vibert Cambridge noted that circa 1920 “Gouveia’s Jazz Band, formed at the start of the decade and led by a Portuguese, was recognized as the pioneer in the performance of jazz during this decade. Indeed, the band was considered the standard to measure jazz band music.”²⁷² On 29 May 1924, the Portuguese Club was formed in Guyana with J. B. Ferreira da Silva, the then Portuguese Consul served as the founder. They later acquired property in Georgetown, at that location was a club house and tennis courts, dances and other cultural activities were held at the Club and it served as a socialising arena over the years.²⁷³ By the mid twentieth century though greatly reduced, the involvement of persons of Portuguese descent in entertainment was still evident. In 1953, the band *Bing Serrão and the Ramblers* was formed in Guyana. This was originally a family group that Bing started with his brothers Bernie and Maurice. By 1964 they migrated to Toronto, Canada, where they continued to perform.²⁷⁴ Fifty-six years later this group still produces albums and performs in Canada.²⁷⁵ International recording artist Dave Martins has led his band since the 1960s. He noted that “his introduction to music came from his mother, Zepherina Barcellos, the daughter of Portuguese indentured labourers.”²⁷⁶ His father, Joseph Francis Martins, was born in Funchal Madeira. Dave Martins started a small band with his friends in Guyana and later moved to Toronto, Canada, where he formed a band called *The Latins*. He subsequently renamed it *The Debonairs*, Martins formed a third group in 1966 called the *Caribbean Trade Winds*. It was later adapted to *Dave Martins and the Trade Winds*. In the 1970s he

²⁷¹Menezes, *The Portuguese of Guyana*, 135.

²⁷²Vibert Cambridge, *Musical Life in Guyana: History and Politics of Controlling Creativity* (Jackson: University Press of Mississippi), Kindle Edition, 58.

²⁷³*Portuguese Club Membership Directory 1924-1974*; and *Portuguese Club Silver Jubilee Souvenir Magazine, 1924 -1949* (Georgetown British Guiana, 1949).

²⁷⁴The original members of the group included Michael Andrews, Romeo Rego, Mark Steeles, and Ambrose De Souza. See Cambridge, *Musical Life in Guyana*, 143.

²⁷⁵*Bing Serrão & the Ramblers: Guyana’s First Amplified String Band*, <https://bingserroandtheramblers.com/bio/>

²⁷⁶Rehanna Ramsay, “Musical Extraordinaire, David Martins, is a ‘Special Person’”, *Kaieteur News* (3 May 2020).

launched his own night club in Toronto. Having achieved great success. Martins and his band performed in North America and throughout the Caribbean.²⁷⁷ Cambridge assessed that “Martins composed and recorded songs that questioned the state of Caribbean identity.”²⁷⁸ In his later years, he returned to Guyana.

Throughout the twentieth century, the Portuguese community dwindled significantly in Guyana. By 1980, there were only 3,011 persons categorized as Portuguese in the country²⁷⁹ and there were minimal public social activities by that grouping by the end of the twentieth century. A few noted events include the celebration of the 150th anniversary in 1985 of the arrival of the Portuguese in Guyana, M. N. Menezes’s first book on the Portuguese, *Scenes from the History of the Portuguese in Guyana* was published to commemorate this event.²⁸⁰ In 1995, the Guyana Heritage Society hosted an evening to celebrate the 160th anniversary of the arrival of the Portuguese. At this event a lecture was delivered by M. N. Menezes, a Portuguese dance by young girls trained by Roman Catholic Nun Sr. M. Kosta Pereira was performed and “there was a display of Portuguese artifacts and craft”²⁸¹ as well as Madeiran Portuguese food. This event generated GY\$48,000.00 for the Society.²⁸² For the period 1992 to 2001, a yearly reception was held on 10 June in commemoration of Portugal Day in Guyana hosted by John Simon de Freitas, who served as the Honorary Consul for Portugal during that period.²⁸³ While in 2017, the then President of Guyana David Granger officially declared the 3 of May as *Portuguese Arrival Day*.²⁸⁴

²⁷⁷Ramsay, “Musical Extraordinaire, David Martins.”

²⁷⁸Cambridge, *Musical Life in Guyana*, 227.

²⁷⁹Bureau of Statistics, Guyana, Compendium 2: Population Composition, 2012 (Georgetown: Bureau of Statistics, 2016), 5.

²⁸⁰Brian L. Moore, Review of *Scenes from the History of the Portuguese in Guyana* by M. N. Menezes, *Nieuwe West-Indische Gids / New West Indian Guide* 62, no. 1/2 (1988): 57.

²⁸¹“Portuguese Evening,” *Heritage News: The Newsletter of the Guyana Heritage Society*, 3, August 1996, 7.

²⁸²“Portuguese Evening,” *Heritage News: The Newsletter of the Guyana Heritage Society*, 3, August 1996, 7.

²⁸³John de Freitas and Joanne Collins-Gonsalves, “John Simon de Freitas: A Brief Survey of His Life” (unpublished manuscript, June 2011), PDF file, 13.

In Antigua, the Portuguese immigrants and their descendants were not welcomed into the elite social groupings of the white ruling class. They were “excluded from the white social clubs—the Antigua Cricket Club, the Antigua Lawn Tennis Club, and the New Club.”²⁸⁵ Their Catholicism set them apart and they were not accepted into the white Anglican social groups. Lowes aptly noted that the Portuguese in Antigua “was a group that maintained its separateness, or had it maintained for them.”²⁸⁶ In Trinidad, while their entrance into politics did not occur until the twentieth century, it was their cultural contributions which are of note. At the end of the nineteenth century, a Portuguese brass band was formed in 1899 and continued to 1902, while in July 1905 the *Grupo Dramático Português Primeiro de Dezembro* was formed and held concerts among other activities to raise funds to assist those in need. This group went through several incarnations and was also known as the *Associação Portuguesa Primeiro de Dezembro*, or the *Portuguese Association*.²⁸⁷ In 1927, the Portuguese Club was “acclaimed for its many socials and dance competitions.”²⁸⁸ Both the Club and Association were avenues for this minority community to gather and celebrate. The Portuguese immigrants and their descendants in Trinidad formed musical groups and produced musicians of note from the nineteenth century to contemporary times and contributed to carnival, literature, as artists, as well through other forms of cultural expression.²⁸⁹

Within St. Vincent, the Portuguese immigrants originally retained their language. In the 1840s and 1850s they spoke exclusively Portuguese to the extent that interpreters were required, however, by the early twentieth century their descendants rarely continued to speak the language, instead opting to converse in English. By the 1970s there were no persons who exclus-

²⁸⁴Message by President David Granger for “Portuguese Arrival Day,” 3 May, 2017, Department of Public Information, Guyana <https://dpi.gov.gy/message-by-president-david-granger-for-portuguese-arrival-day/>

²⁸⁵Lowes, “Rum and Coca-Cola.”

²⁸⁶Lowes, “Rum and Coca-Cola.”

²⁸⁷Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 5.

²⁸⁸Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 5.

²⁸⁹See an in-depth discussion in Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 5.

ively spoke Portuguese on the island.²⁹⁰ Ciski contended that “it appears that as the Portuguese culturally assimilated to St. Vincent, their interest in Madeira as the old homeland waned.”²⁹¹ The assimilation of the Portuguese in Bermuda occurred in waves. The early arrivals after 1849, were assigned to plots of land throughout the island, generally separate from each other. The repercussion was that the new immigrants often had to learn the English language in order to conduct business and converse with the other inhabitants. However by end of the nineteenth century with increased arrivals from the Azores, they relied on their community greatly. Mudd noted “they were still engaged in farming, conversed in their own language, ate most of their accustomed foods, made most of their own clothes, socialized and married within the Portuguese community.”²⁹² The legacy of the Portuguese immigrants in Bermuda which started with the first group of Madeiran agricultural labourers and later those primarily from the Azores, would form social organisations, specifically, the Vasco da Gama Club and the Portuguese Cultural Association.²⁹³ In June 2011, the Bermudian Ministry of Cultural Affairs and the Vasco da Gama Club hosted Portugal day with the theme ‘From Azores to Bermuda’, at which aspects of Portuguese culture was displayed including traditional dances, folk songs and a band—academic lectures were also delivered.²⁹⁴ A tangible public acknowledgment of the contributions of the Portuguese in Bermuda was a declaration of a national holiday in their honour on 4 November 2019. A commemorative stamp was also commissioned.²⁹⁵ Contemporarily, Portuguese is taught at a Portuguese

²⁹⁰Ciski, *The Vincentian Portuguese*, 61, 97-103.

²⁹¹Ciski, *The Vincentian Portuguese*, 98.

²⁹²Mudd, *Portuguese Bermudians*, 148.

²⁹³Rosemary Jones, “Bermuda’s Portuguese,” Hachette Book Group, <https://www.hachettebookgroup.com>.

²⁹⁴See Edward Harris, “A Day for Portugal in Victoria’s Park,” *The Royal Gazette* (26 June 2011) and “Photos: 2011 Portugal Day at Victoria Park,” *BerNews* (11 June 2011), <https://bernews.com/2011/06/photos-portugal-day-at-victoria-park/>

²⁹⁵See Premier David Burt’s Statement on the 14 November 2019 National Holiday in “Holiday to Mark Arrival of Portuguese Immigrants,” *BerNews* (1 June 2018); Sarah Lagan, “Portuguese Welcome 170th Anniversary Holiday,” *The Royal Gazette* (30 October 2019); “Bermudas Declaram Feriado Nacional Para Evocar Primeiros Imigrantes Portugueses,” *Diário de Notícias* (9 June 2019), <https://www.dnoticias.pt/mundo/bermundas-declaram-feriado-nacional-para-evocar-primeiros-imigrantes-portugueses-JF3263821> and Harris, “A Day for

school that was “started nearly 40 years ago by the Portuguese Cultural Centre, which merged with the Portuguese Association to become the Portuguese Cultural Association in the early 1990s.”²⁹⁶ It continues to today. Over the years, hundreds of children have learnt Portuguese in Bermuda at that school, while in 2020 during the Covid-19 pandemic the children were taught online with a teacher from Portugal.²⁹⁷

Religion and the Portuguese immigrants

In the nineteenth century, the Portuguese immigrants in the English-official Caribbean territories were mainly Roman Catholic with smaller communities of Protestants. The Roman Catholic Church in Guyana grew significantly with the arrival of Portuguese labourers. By the end of 1835, 429 Madeirans had arrived and by 1858 there were approximately 25,000 Portuguese in Guyana and almost all were Catholic.²⁹⁸ After a decade of no Portuguese-speaking clergy, in 1845, Senhor Joaquin Antonio Correa de Natividade arrived from Portugal and was ordained a priest on 5 October 1845 in the colony.²⁹⁹ He served in Essequibo, but his stay was short lived. On the West Bank of Demerara, the Malgretout church was established in the early 1840s and on the East Coast, the “church’s ‘stations’ followed the expansion of the railways which extended to Plaisance in 1848, to Buxton and Belfield in the 1850s and to Clonbrook and Mahaica in the 1860s.”³⁰⁰ Victoria followed in 1866 and Plaisance in 1870 and by 1931, there were 30,382 Catholics in the colony.³⁰¹ The Madeirans brought with them the tradition of commemorating the religious *festas*, which were “celebrated with equal joy, pomp, splend-

Portugal in Victoria’s Park.”

²⁹⁶Heather Wood, “Keeping Portuguese Alive on Island,” *The Royal Gazette* (25 September 2020), <https://www.royalgazette.com> and Portuguese Cultural Association, <http://portugueseabda.com/>.

²⁹⁷Wood, “Keeping Portuguese Alive on Island.”

²⁹⁸Statement of the Total Number of Immigrants Introduced into the Colony of British Guiana, from the 1st January 1835—30th June 1885,” *The Official Gazette of British Guiana*, II (20), 5 September 1885, NAG.

²⁹⁹*The Daily Chronicle*, 15 June 1893.

³⁰⁰M. N. Menezes, “The Madeiran Portuguese and the Establishment of the Catholic Church in British Guiana, 1835-98,” in Howard Johnson, ed., *After the Crossing: Immigrants and Minorities in Caribbean Creole Society* (London: Frank Cass and Company Ltd., 1988), 64.

³⁰¹C. N. Horton, *Report on the Results of the Census of the Population, 1931* (Georgetown: “The Argosy” Co. Ltd., 1932) AK I 25, NAG, xli.

our and extravagance”³⁰² most notably, on Christmas day, the *Missa do Galo* (midnight mass) and *Missa dos Pastores*. The Christmas novenas in the nineteenth century was celebrated by the Portuguese immigrants at the Church of the Sacred Heart in Georgetown and the *Bem dita Seijães*, a hymn to Mary, the mother of Jesus, was sung in Portuguese. This tradition was soon adopted by other Catholic churches in Guyana and continues into the twenty-first century each Christmas. The novenas were held in the early hours of the morning, with churches opening from 3:00 A.M. and the novenas starting at 4:00 A.M. However, this was changed in the late twentieth century to various times during the day, and sections of the *Bem dita Seijães* hymn are now sung in English.³⁰³ In addition to the Christmas celebrations, the Roman Catholic Saints were honoured with special *festas* by the Portuguese community—St. Peter, St. John the Baptist, St. Anthony, Corpus Christi and Pentecost were also celebrated.

In the sphere of charity, many of the religious *festas* included a charitable component. It was noted that “Portuguese feasts were fiestas: one good thing was that some poor men would get a good dinner, and needy families were relieved.”³⁰⁴ In some cases, not only a meal was provided but clothing as well.³⁰⁵ Each year on 13 June, the *St. Vincent de Paul Society* of Guyana distributed *St. Anthony’s Bread* to the poor and was celebrated with reverence by the Madeiran Portuguese. It is a tradition that continues to today.³⁰⁶

With the increased Catholic population, many of whom were Portuguese, came the need for education. As such, in 1847 the Roman Catholic Ursuline Nuns entered the colony and opened the St. Angela’s school in the 1850s, and later St. Rose’s, St. Philomena and St. Ursula schools. In March 1857, the Jesuits arrived and they greatly aided the growth of the Roman

³⁰²Menezes, *The Portuguese of Guyana*, 13.

³⁰³See Menezes, *Scenes from the History of the Portuguese*, 109 and Jerri Dias, Letter to the Editor, “Portuguese Influenced Catholic Christmas Traditions in Guyana,” *Stabroek News* (30 November 2017).

³⁰⁴John Bridges, *Men of Faith: Who Served the Catholic Church in British Guiana under Bishops Etheridge, Butler and Galton, 1857-1931* (London: Jesuit Missions, 1988), 9.

³⁰⁵John Thomas Hynes, *The Diary (1842-1868) of John Thomas Hynes O.P. 1799-1869: Bishop of Leros and Apostolic Administrator, later Vicar Apostolic of British Guiana 1843-1858*, transcribed and edited by Brian Condon (Melbourne: MDHC Catholic Archdiocese of Melbourne, 2002).

³⁰⁶Cynthia Nelson, “Giving Thanks: St Anthony’s Bread,” *Stabroek News* (9 June 2012).

Catholic church in Guyana. On 1 May 1866 the Jesuits opened the Catholic Grammar school, later renamed the St. Stanislaus College, a chosen school for Portuguese boys in Guyana at which Portuguese was taught as a subject.³⁰⁷ The Jesuits were also instrumental in the building of the first *Church of the Sacred Heart*, under the direction of Bishop James Etheridge S.J. and Fr. Benedict Schembri S.J. It was blessed at a midnight mass in December 1861 and received the Papal Blessing on 22 June 1862. Masses were originally conducted in Portuguese for the Madeiran Portuguese immigrants and as the Portuguese assimilated, masses were later said in English. In 1869, the erection of two altars for the Sacred Heart Church, Main Street, Georgetown, was financed through the ingenuity of a group of Portuguese ladies who raised the money by way of two lotteries.³⁰⁸ Portuguese women also assisted in other charitable projects. On 25 December 2004, a disastrous fire destroyed the *Church of the Sacred Heart*³⁰⁹ and for eleven years services were held at the *Ursuline Convent*, Camp and Church streets, Georgetown. A new structure was completed in December 2015 at a cost of GY\$144 million.³¹⁰ This is one of the main churches where the few persons of Portuguese descent in Guyana attend.

The Sword of the Spirit movement, a charitable organisation of the Roman Catholic Church, was chaired in the early 1940s by J. Edward de Freitas and the governing committee included prominent persons of Portuguese descent.³¹¹ One of the lasting legacies of this organisation is the St. Joseph Mercy Hospital, the idea of which was conceived in 1943. The hospital was officially opened on 1 September 1945. The Sisters of Mercy, who first arrived in Guyana in 1894, were critical to the administration of this hospital from the beginning. While the list is extensive, a few prominent religious of Portuguese descent who have served over the years in Guyana include Pro-

³⁰⁷“Advertisement, Collegio Catholico Brick Dam Grammar School,” *O Portuguez* 36 (4 September 1880).

³⁰⁸Bridges, *Men of Faith*, 20.

³⁰⁹Miranda La Rose, “Crib Fire Levels Sacred Heart Church, School—Fire Service Criticised over Response,” *Stabroek News* (28 December 2004).

³¹⁰“Sacred Heart Re-opened with Much Joy and Thanksgiving,” *Catholic Standard* (11 December 2015).

³¹¹Letter from J. Edward de Freitas, Chairman, Sword of the Spirit, British Guiana, to Rev. Mother Provincial, Sisters of Mercy, Dallas USA, 27 June 1944.

fessor Mary Noel Menezes R.S.M.,³¹² Sr. Beatrice Fernandes O.S.U. and Fr. Malcolm Rodrigues S.J. among many others. From the 2000s there was an influx of Portuguese from Brazil, many of whom were Roman Catholic. The Catholic Church in Guyana responded by offering special masses in Portuguese at the *Our Lady of Fatima* church in Georgetown from February 2011.

Of the Madeiran Protestant Portuguese community, there are limited reports of their religious activities in Guyana. In the early 1850s it was noted that nineteen Madeiran Portuguese attended a small church in Essequibo, with a membership of over one hundred persons. Of these, five were the original followers of Kalley from Madeira and one of them was taught in one of Kalley's schools in Madeira and was literate.³¹³ The church in Essequibo was reportedly led by an English-speaking plantation owner and his account is worth quoting at length:

We do not identify ourselves with any denomination, but the only test required for fellowship is an interest in 'the blood of the lamb' ... five were received into the church of Madeira ... they sing and pray in their own tongue [Portuguese], in which I sometimes have owned fellowship, though it is but few words I understand ... when the chapter [of the Bible] is read, I refer them to every text that I can, that I think will throw light on the portion read. Then talk what I feel led to say; this brother assisted by those two sisters interpreting it to the others. And I am happy to say there is an enquiring mind, while the many questions asked show me plainly they understand what is said. In our public meetings, particularly at the Lord's table I sometimes try to speak to them a few words through this brother.³¹⁴

Circa 1855-1856, the Society for the Propagation of the Gospel noted that in Beterverwaging on the East Coast of Demerara and Wakenaam in the Es-

³¹²Professor Menezes is the leading historian on the Portuguese in Guyana. She has produced two books and numerous book chapters and journal articles on this subject. See Hazel Woolford, *A Bibliography of the Works of Prof. Mary Noel Menezes: 1965-1990*, University of Guyana Library, July 1990; Jo-Anne Ferreira, "The Impact of Sr. Mary Noel Menezes' Work on Lusophone Studies in Guyana and the Caribbean, Lecture delivered at Inaugural Prof. Mary Noel Menezes Distinguished Lecture, University of Guyana, 3 December 2016, https://www.academia.edu/39169627/Prof_Sr_Mary_Noel_Menezes_Inaugural_Distinguished_Lecture_UG_Dec_2016; and Joanne Collins-Gonsalves, "Professor Mary Noel Menezes," in *Heroes of Our Nation: 50 Nation Builders of Guyana* (Georgetown: Department of Culture, Government of Guyana, 2017).

³¹³Blackburn, *The Exiles of Madeira*, 178-180.

³¹⁴Blackburn, *The Exiles of Madeira*, 178-180.

sequibo, where there were no Catholic priests, the Portuguese “attended the Anglican chapels where there ministers spoke Portuguese.”³¹⁵ Whether these Portuguese speaking ministers had any connection to Madeira has not yet been determined. Another account of their presence in Guyana stems from Sr. Paul D’Ornellas, a Roman Catholic Nun from Trinidad whose “paternal grandfather fled from Madeira during the persecution of the Presbyterians there and he and his family settled in Guyana.”³¹⁶ Her father later moved to Trinidad, where there was a larger Madeiran Presbyterian church and community.

In Trinidad, the Portuguese immigrants were both Roman Catholic and Protestant, unlike in Guyana where the majority were staunch Catholics. A vibrant Protestant community existed on this island from the 1840s, when followers of Dr. Kalley from Madeira arrived in 1846, as earlier noted. Alexander Kennedy stated that “their first minister, the Rev. William Hepburn Hewitson, was one who had laboured among them in Madeira, and followed them to Trinidad for the purpose of forming them into a church.”³¹⁷ The Portuguese from Madeira were embraced by the Church of Scotland and attended the Greyfriars Church, where the church leaders “learned the Portuguese language, in order that they might be able to console this afflicted but interesting people.”³¹⁸ In 1850 the Madeiran Protestants moved to a new location in Port of Spain, Trinidad, and built their own church which opened in 1854. The name of the church was changed over the years, first as the Portuguese Chapel or Church, secondly as the United Free Church (or Free Kirk) and finally as the St. Ann’s Church of Scotland.³¹⁹ Among the Por-

³¹⁵Society for the Propagation of the Gospel Correspondence, 24 December 1855 and 14 January 1856, quoted in Menezes, *The Portuguese of Guyana*, 93.

³¹⁶John Pereira and Jo-Anne S. Ferreira, “The Contribution of the Portuguese to the Roman Catholic Church in Trinidad and Tobago,” *The Portuguese of Trinidad and Tobago*, <https://www.tpportuguese.com/the-contribution-of-the-portuguese>, 2011.

³¹⁷C. B. Franklin and R. E. Welsh, *“After Many Days”: A Memoir Being a Sketch of the Life and Labours of Rev. Alexander Kennedy, First Presbyterian Missionary to Trinidad, Founder of Greyfriars Church, and Its Pastor for Fourteen Years: January 1836-December 1849* (Port of Spain, Trinidad: Published under the auspices of the session of Greyfriars Church, Trinidad, 1910), 51.

³¹⁸Presbyterian Missionary Record, June 1848, republished in Franklin and Welsh, *“After Many Days”*, 60.

³¹⁹Franklin and Welsh, *“After Many Days”*, 52; Greyfriars / St. Ann’s Church: Our History, *Church of Scotland in Trinidad and Tobago (Scottish Presbyterian)*, <http://www.churchofscot->

tuguese, it was noted that “the Protestants eventually became absorbed by the larger Catholic Portuguese community, and religious differences ceased to operate as a dividing factor between the two groups.”³²⁰ Ferreira found that by the early twentieth century, the majority were Catholic.³²¹ Among the Portuguese Trinidadian Catholics, the Feast of the Assumption, *Nossa Senhora do Monte* (Our Lady of the Mount), was celebrated with much pomp and ceremony on 14 and 15 of August each year at the Church of Our Lady of Laventille.³²² At this church the Portuguese connection is noted: “the chapel’s cornerstone was laid by Princess Aldegonda of the House of Bragança, Portugal, and her French husband Henri de Bourbon-Parma, Count of Bardi during their visit to Trinidad that year, and the building was completed in 1891.”³²³ The Portuguese Catholics in Trinidad also celebrated the feast of the Epiphany and of Saints Peter, Gregory and Anthony.³²⁴

While in St. Kitts very little is written on the Roman Catholic Portuguese, it has been stated that “the Catholic presence was greatly enhanced by migration from neighbouring French St. Bartholomew and later by the presence of Madeiran indentured workers.”³²⁵ They assisted in the expansion of the Co-Cathedral in Basseterre, which was first built in the late 1850s. The presence of Protestant Madeirans was highlighted in the notes on new arrivals in May 1846. It was stated that “we learn that they are Protestants, and have been receiving religious instruction from Dr. Kalley, the zealous Scotchman, who lately had to endure severe persecution at the hands of the authorities of Madeira.”³²⁶ Whether the Protestant Madeirans formed their

landtt.org/our-story.html; and “The Portuguese of the West Indies: Clifford R. L. Rawlins” and “The Portuguese Presbyterians,” in “The Portuguese of the West Indies,” http://freepages.rootsweb.com/~portwestind/genealogy/diaspora/west_indies/rawlins.html, 2011.

³²⁰Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 4.

³²¹Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 4.

³²²Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 4; and Leslie-Ann Paul, “Our Lady on the Hill,” *Trinidad and Tobago Newsday* (22 September 2020).

³²³Paul, “Our Lady on the Hill.”

³²⁴Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 4.

³²⁵Co-Cathedral of the Immaculate Conception, Diocese of St. John’s-Basseterre, *Historic St. Kitts*, National Archives of St. Kitts and Nevis, <https://www.historickitts.kn/> and www.nationalarchives.gov.kn

³²⁶The *Royal Gazette Bermuda Commercial and General Advertiser and Recorder* (23 June 1846), 3.

own religious communities or integrated into the Protestant community in St. Kitts is unknown.

In Bermuda, the first Roman Catholic church, St. Edwards was built in 1859.³²⁷ However, the Madeiran immigrants having arrived on the island ten years earlier in 1849 attended masses at various locations including the Barracks Chapel at St. George's and in private homes.³²⁸ This was similar to the case of the early Portuguese in Guyana within the areas on the East Coast of Demerara, Berbice and Essequibo.³²⁹ Additionally, in Bermuda, the Portuguese immigrants attended the Anglican and Established churches and the sacraments of baptism and marriages were also performed. In fact, the first Madeiran Portuguese marriage was recorded in March 1850 at the St. John's Anglican church, with subsequent unions in July and November.³³⁰ The affiliation with the Anglican and Established Churches continued into the 1880s. However, with the influx of Azoreans the dynamic changed. Mudd noted that for persons of Portuguese descent born during the years 1888 and 1889, 67% were baptised in the Roman Catholic Church.³³¹ Contemporarily, in Bermuda, while the Portuguese are members of other religious persuasions, they remain predominantly Roman Catholic, to the extent that the Saturday and Sunday masses are celebrated in Portuguese at the St. Theresa's Cathedral Parish.³³² The Roman Catholic Diocese of Bermuda also shares a religious bulletin in Portuguese titled *Boletim Dominical Português*. Some of the feasts celebrated and supported by the Portuguese community throughout the year are the Feast of the Holy Spirit Festival, which was started by the Roman Catholic pastoral committee, the Feast of São João, and the Santo Cristo festival.³³³

Within St. Vincent, among the Portuguese, both Roman Catholics and Protestants are recorded in the historical literature. Between 1844-1846, ap-

³²⁷The chapel was opened on 14 April 1859. See *The Royal Gazette, Bermuda* (26 April 1859), 2; and Helen Rowe, *A Guide to the Records of Bermuda* (Hamilton: Bermuda Archives, 1980), 79.

³²⁸Mudd, *Portuguese Bermudians*, 152.

³²⁹Bridges, *Men of Faith*, 5.

³³⁰Mudd, *Portuguese Bermudians*, 62.

³³¹Mudd, *Portuguese Bermudians*, 153.

³³²St. Theresa's Cathedral Parish, Roman Catholic Diocese of Hamilton in Bermuda, *Mass Schedule*, <https://www.romancatholicbermuda.bm/parishes/st-theresas-cathedral-parish>

³³³Lagan, "Portuguese Welcome."

proximately one hundred Protestant followers of Kalley went to St. Vincent, but it is unknown whether any formed their own churches.³³⁴ In the early years, as was the case in Guyana, the Portuguese in St. Vincent “where no Catholic chapels or priests were available, they worshipped and had the sacraments performed in the Anglican or Methodist Churches.”³³⁵ Additionally from the nineteenth into the twentieth centuries, a small population of Portuguese were recorded as Protestants and Methodists on the island.³³⁶

The Portuguese immigrants of St. Vincent, were however, primarily Roman Catholic. The first significant Roman Catholic church that served the Portuguese community in St. Vincent was built in 1867 on the Bellevue Estate.³³⁷ The celebration of the sacraments of baptism, first communion, confirmation and marriage provided an avenue for socialization, as the various families commemorated these religious events together.³³⁸ See Table I, for the summary of Roman Catholic baptisms in St. Vincent for the period 1848-1853. The rate of baptism of the Portuguese was often similar to those of other races, despite the Portuguese accounting for approximately only one third of the Catholic population on that island in the nineteenth century.³³⁹

Table I
Roman Catholic Baptisms in St. Vincent, 1848-1853

<i>Year</i>	<i>Portuguese</i>	<i>Others</i>
1848	77	72
1849	63	90
1850	53	82
1851	73	78
1852	65	65
1853	66	61

Source: Carlos Verbeke, “Chronicles of the Catholic Church in St. Vincent (1815-1929),” Manuscript, 1930, qtd. in de Silva, *An Historical Overview of the Madeiran Portuguese in St. Vincent and the Grenadines*, 14.

³³⁴Norton, *Record of Facts*, 94. See also Blackburn, *The Exiles of Madeira*, 174, 187.

³³⁵Ciski, *The Vincentian Portuguese*, 103.

³³⁶Ciski, *The Vincentian Portuguese*, 103 - 104.

³³⁷de Silva, *An Historical Overview of the Madeiran Portuguese in St. Vincent*, 11.

³³⁸Ciski, *The Vincentian Portuguese*, 103.

³³⁹Ciski, *The Vincentian Portuguese*, 104.

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ancestors did 150 years ago.”⁴¹⁰ At the last Guyana census in 2012, persons of Portuguese descent numbered just 1,910 persons,⁴¹¹ the majority of whom resided in Region 4 (1,148) which includes the capital city of Georgetown.⁴¹² The slight increase in the population of Portuguese in Guyana of 412 persons from 2002 to 2012 could be attributed to the influx of Brazilians of Portuguese heritage.⁴¹³

Table 4
Portuguese in Trinidad and Tobago 1891-2011

<i>Year</i>	<i>Portuguese Population</i>
1891	701
1911	708
1921	517
1931	365
1946	313
1960	2,416-3,400
1970	1,802
2011	837

Source: Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

As was the case in Guyana, the Portuguese population in Trinidad and Tobago, steadily decreased from the early 1900s to the 1940s. However, there was a drastic increase from 313 in 1946 to approximately 2,416-3,400 persons by 1960.⁴¹⁴ Ferreira surmised that “the growth of the community may have been partially due to the secondary outmigration from Guyana, St. Vincent

⁴⁰⁸R. R. Kuczynski, *Demographic Survey of the British Colonial Empire ... Volume III. West Indian and American Territories. Published Under the Auspices of the Royal Institute of International Affairs* (London, Geoffrey Cumberlege: Oxford University Press, 1953), 155.

⁴⁰⁹Bureau of Statistics, *Guyana Population and Housing Census for the Year 2012, Compendium 2: Population Composition* (Georgetown: Bureau of Statistics, 2016), 3.

⁴¹⁰Menezes, “The Winged Impulse,” 33.

⁴¹¹Bureau of Statistics, *Guyana Population*, 2.

⁴¹²Bureau of Statistics, *Guyana Population*, 6.

⁴¹³See Hisakhana Pahoona Corbin, “Brazilian Migration to Guyana As a Livelihood Strategy: A Case Study Approach,” MA Thesis, (Universidade Federal do Pará, Núcleo de Altos Estudos Amazônicos, Curso Internacional de Mestrado em Planejamento do Desenvolvimento, Belém, 2007), 36-37, http://repositorio.ufpa.br/jspui/bitstream/2011/19666/1/Dissertacao_BrazilianMigrationGuyana.pdf.

⁴¹⁴Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

and Antigua.”⁴¹⁵ She further noted that the relatively small minority community of Portuguese “have been almost fully integrated into the wider society on all levels.”⁴¹⁶ By 2011, the numbers has once again decreased and stood at 837.⁴¹⁷

While in Guyana, Bermuda and Trinidad and Tobago the relevant data is available of the approximate numbers of Portuguese resident in those countries (whether Portuguese-born or of Portuguese descent), in the other Caribbean territories under review this information was not readily obtainable, as they were not consistently categorized separately in the national records. The more recent statistics indicate the dwindling numbers within these minority communities, however it is important to note that persons of mixed Portuguese heritage through intermarriage are not reflected in these statistics, but at times may continue the Portuguese cultural traditions or engage in their family businesses.

Conclusion

Historically, the Portuguese immigrants who ventured to the Caribbean in the nineteenth century, during periods of economic and social strife in their homeland, sought new opportunities for themselves and their families. Immigrants arrived in the Caribbean legally under official immigration schemes, with contracts of one to five years, as well as through private arrangements. Some skirted the official emigration ports and left Madeira through clandestine means, as a result there are no precise numbers of immigrants, however, the official records of the British colonial authorities indicate the scale of Portuguese immigrants in the English-official Caribbean countries in the nineteenth century. The third category of immigrants, refers primarily to Madeirans who migrated to the Caribbean legally and with capital from the 1840s, a trend that continued into the twentieth century. Within the sphere of entrepreneurship, in all of the territories reviewed, the Portuguese entered into business and experienced varying degrees of success.

In analysing the records, the recurrent theme of movement of the Portuguese in the Caribbean is particularly interesting. It is reminiscent of the

⁴¹⁵Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

⁴¹⁶Ferreira, “Madeiran Portuguese Migration”, 83.

⁴¹⁷Ferreira, *The Portuguese of Trinidad and Tobago*, Kindle edition, chapter 1.

historical travel patterns of the Portuguese, as Newitt noted “individual Portuguese, particularly in the earlier days, have been highly mobile”⁴¹⁸ while Menezes referred to it as the “winged impulse.”⁴¹⁹ From 1834 onwards, the Portuguese immigrants primarily from Madeira, continued this tradition and travelled between the Caribbean territories, both temporarily and permanently and maintained communication through family reunions, traditional mail and resettlement. These movements were in large part not included in the official arrival statistics of these Caribbean territories. Emigration from the Caribbean region from the nineteenth to the twenty-first centuries continued the cycle of migration.

Despite geographical differences, the Portuguese family ties and cultural contributions are key similarities across the Caribbean, this in turn relates to the gastronomical history of the Portuguese in the Caribbean, which can be assessed in phases. The Portuguese born in Madeira, the Azores and Cape Verde Islands generally maintained their traditional dishes, however with assimilation, new combinations were incorporated by their descendants and some Portuguese traditions were not passed down to subsequent generations. Contemporarily, the culinary legacy is primarily garlic pork in Guyana, St. Vincent, Trinidad, St. Kitts, Grenada and Antigua. *Malassadas* are more popular in Bermuda and also in Guyana where they are mainly prepared on Shrove Tuesday. Bermuda, with a larger population of Portuguese and more recent immigrants, has a wider array of Portuguese cuisine. With the out-migration of the Portuguese from the Caribbean region, the culinary legacy, though limited, has been extended to the descendants of Caribbean Portuguese within the diasporic communities in the USA, Canada, UK and further afield.

Ultimately, over the last 187 years, the Portuguese from Madeira, the Azores and Cape Verde Islands have largely assimilated into the English-official Caribbean countries and contributed to the multicultural societies in each territory. There is still much more research to be undertaken on these communities in the Caribbean, from the nineteenth century to the present day. Such research would further explore the historical colonial records, document their experiences in the twentieth century and the exodus away from

⁴¹⁸Newitt, *Emigration and the Sea*, II.

⁴¹⁹Menezes, “The Winged Impulse,” 17-36.

the Caribbean as well as record the history and experiences of present day descendants of Portuguese immigrants domiciled in the Caribbean.

Edições dos manuscritos sobre os descobrimentos como fundamentos da identidade portuguesa oitocentista: o caso da *Crónica de Guiné*¹

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Introdução

Sérgio Campos Matos ressalta que, em comparação ao restante da Europa, principalmente em relação à França e a Espanha, a identidade nacional não foi um tema tão aprofundado nos estudos portugueses.² Por outro lado, isso não significa que o assunto esteja ausente da historiografia portuguesa, pois ele marcou presença especialmente no período posterior à Revolução dos Cravos.³ Uma possível explicação para essa menor ênfase nos estudos sobre a identidade portuguesa seria devido ao “[...] escasso peso das minorias étnicas, religiosas e linguísticas no todo nacional, de um modo geral nele inte-

¹Este artigo foi desenvolvido através do apoio financeiro da Fundação Luso-Americana para o Desenvolvimento (FLAD) e da Brown University. Agradeço aos comentários e orientação de Onésimo Teotónio Almeida e a revisão de Aline de Almeida Moura.

²Sérgio Campos Matos, *Consciência histórica e nacionalismo: Portugal – séculos XIX e XX* (Lisboa: Livros Horizonte, 2008), 17.

³Segue a lista de livros mencionados por Matos com a adição de alguns trabalhos que considero de igual importância para o estudo da identidade portuguesa. Ver: Eduardo Lourenço, *O Labirinto da saudade: Psicanálise mítica do destino português* (Lisboa: Publicações Dom Quixote, 1982); António Marques Bessa, *Cumprir Portugal: A identidade portuguesa* (Lisboa: Instituto Dom João de Castro, 1988); Francisco Bethencourt and Diogo Ramada Curto, *A Memória da nação: Colóquio do Gabinete de Estudos de Simbologia realizado na Fundação Calouste Gulbenkian, 7-9 Outubro, 1987* (Lisboa: Livraria Sá da Costa Editora, 1991); José Matoso, *A Identidade nacional: Portugal* (Lisboa: Gradiva, 1998); João Medina, *Portuguesismo(s): (acerca da identidade nacional)* (Lisboa: Centro de História da Universidade de Lisboa, 2006); Hermenegildo Fernandes, Isabel C. Henriques, José da S. Horta e Sérgio Campos Matos, *Nação e identidades: Portugal, Os Portugueses e os outros* (Casal de Cambra: Caleidoscópio, 2009); José Manuel Sobral, *Portugal, Portugueses: Uma identidade nacional* (Lisboa, Portugal: Fundação Francisco Manuel dos Santos, 2012); Onésimo Teotónio Almeida, *A Obsessão da portugalidade: Identidade, língua, saudade & valores* (Lisboa: Quetzal Editores, 2017).



gradas sem problemas; escassez de revoltas e rebeliões regionais e locais”.⁴ Isso significa que o contexto cultural possibilitou uma relativa homogeneidade e estabilidade que distinguiu o país do restante da Europa.⁵

Se a inexistência de conflitos étnicos foi um fator essencial para a relativa unidade do país, por outro lado, também deveriam ser considerados a importância da difusão das ideias nacionalistas e o papel da história na solidificação do sentido de unidade nacional. Ao longo do século XIX, por diversas ocasiões, a independência e autonomia do Estado estiveram ameaçadas, tanto em razão dos conflitos internos, quanto por agressões e impasses externos.⁶ Em relação ao último aspecto, no plano internacional, durante as primeiras décadas do século XIX, Portugal enfrentou “diversas situações de conflito político e militar.”⁷ Logo nos primórdios da centúria à pressão diplomática da França napoleônica seguiram-se três invasões do território nacional pelos seus exércitos (1807-1811). Da ocupação inglesa (1807-1820) à Guerra Civil de 1832-1834⁸ [...]”⁹ Somados a isso, registram-se outros eventos como o “[...] déficit das finanças públicas; o desafio iberista – tão vivo nos de-

⁴Matos, *Consciência histórica e nacionalismo*, 17.

⁵Anthony D. Smith situa o caso de Portugal, ao lado da Grécia e Polônia, como sendo uma das poucas nações que conseguiu estabelecer os dois polos das formações nacionais entre o modelo cívico e o genealógico resultando no fato da “*ethnie* co-extensive and fully congruent with the state”. Além disso, Portugal consolidou-se como um “[...] mono-ethnic states or genuine ‘nation-states’”. Anthony D. Smith, *The Ethnic Origins of Nations* (Oxford, UK: B. Blackwell, 1987), 150.

⁶Matos, *Consciência histórica e nacionalismo*, 17.

⁷Um exemplo dessa situação de conflito pode ser demonstrado através da invasão do Tejo pela esquadra francesa sob o comando do Almirante Roussin, que resultou no aprisionamento de oito navios portugueses. Ver: “Dossier: Relatif au séquestre des 8 navires de guerre Portugais, par l’escadre Française dans le port de Brest,” Arquivo Nacional da Torre do Tombo (ANTT), Cota atual: Ministério dos Negócios Estrangeiros – cx. 191, Documento: PT/TT/MNE-CP/MTM/C191.24. e “Reclamações Francesas derivadas da invasão de 14 de Julho – 1831 (Almirante Roussin),” Arquivo Nacional da Torre do Tombo (ANTT), Cota atual: Ministério dos Negócios Estrangeiros – cx. 192, Documento: PT/TT/MNE-CP/MTM/C192.2. e também verificar “Artigos reclamações portuguesas,” Arquivo Nacional da Torre do Tombo (ANTT), Cota atual: Ministério dos Negócios Estrangeiros – cx. 192, Documento: PT/TT/MNE-CP/MTM/C192.3.

⁸Para uma análise que demonstra o desgaste militar do conflito, ver: António Ventura, *As Guerras liberais, 1820-1834* (Matosinhos: Quidnovi Editora, 2008). Estudos mais recentes que abrangem o período, ver: Daniel Estudante Protásio, *História, cultura e política na época do Visconde de Santarém (1791-1856)* (Lisboa: Centro de História da Universidade de Lisboa, 2019).

⁹Matos, *Consciência histórica e nacionalismo*, 51.

cênios de 1850-1870 ou logo após a instauração da I República em 1910 – e a questão colonial, a ameaça que outras potências europeias com maiores recursos significavam em África”.¹⁰ Nesse cenário conturbado, as produções historiográficas oitocentistas, além de promotoras de ideologias estatais e de correntes políticas organizadas, imbuídas no fortalecimento da homogeneidade nacional, serviram igualmente para legitimar as demandas internacionais da nação portuguesa.¹¹ Da mesma maneira, as publicações de fontes, indispensáveis ao conhecimento do passado e associação com uma comunidade portuguesa, seguiram pelo mesmo caminho, criando bases para o reconhecimento diplomático da identidade e fortalecimento do Estado português no cenário externo.

No que diz respeito à construção da “consciência nacional”, a produção historiográfica oitocentista provinha, prioritariamente, de letrados da classe média, em sua maioria, funcionários públicos e jornalistas, geralmente com formação acadêmica, mas não necessariamente pertencentes ao ambiente universitário.¹² Naquele contexto, a descoberta e resgate de manuscritos inéditos ou, até mesmo, considerados perdidos constituíram-se em importantes fontes de entendimento do passado português. Desse modo, passa a ser comum a edição de manuscritos medievais para formato de livro, sendo alguns desses materiais geralmente atualizados para a linguagem contemporânea e acompanhados de paratextos, como prólogos, introduções e notas de rodapé.

Levando essas questões apontadas em consideração, assevera-se que as edições de manuscritos oriundos do século xv e xvi funcionaram como um importante elemento, tanto para a consolidação do campo de estudos sobre os descobrimentos e a expansão marítima, quanto a fundamentação da identidade portuguesa oitocentista. No caso deste estudo, dentre os inúmeros manuscritos publicados, será destacada a primeira edição impressa de 1841 da *Chronica do Descobrimento e Conquista de Guiné*¹³, de Gomes Eannes de Zurara.¹⁴ Isto posto, este artigo sustenta a hipótese de que a primeira edição da

¹⁰Matos, *Consciência histórica e nacionalismo*, 17.

¹¹Matos, *Consciência histórica e nacionalismo*, 18.

¹²Matos, *Consciência histórica e nacionalismo*, 8.

¹³Gomes Eannes de Azurara, *Chronica do descobrimento e conquista de Guiné* (Pariz: J. P. Aillaud, 1841); <https://archive.org/stream/chronicadodescoo00zuragoog>

¹⁴Na primeira edição desse manuscrito impresso em 1841, o nome do cronista é grafado como “Azurara”, no entanto, em algumas das subsequentes edições e estudos sobre a crôni-

*Crónica de Guiné*¹⁵ serviu como um dos fundamentos da identidade portuguesa, não apenas em um sentido de identificação para com um passado compartilhado por todos os portugueses, em um nível interno, mas sobretudo, em um nível externo, para o reconhecimento das potências europeias da existência de uma associação entre a prioridade dos descobrimentos e navegações marítimas do século xv e xvi com a contemporânea nacionalidade portuguesa.

Sobre o manuscrito d'A Crónica de Guiné

Desde a primeira edição da *Crónica de Guiné*, em 1841, ela tornou-se uma fonte essencial para os estudos sobre as primeiras viagens marítimas dos portugueses sob o mando do Infante D. Henrique. A crónica de Zurara recebeu diversas reedições e traduções, o que vem a demonstrar a importância desse relato para a constituição dos descobrimentos e expansão marítima portuguesa como tema de estudo e para a fundamentação da identidade portuguesa. Listando esses trabalhos, salientamos que, em 1854, é lançada uma nova impressão da edição de 1841, publicada em Paris, pelo mesmo livreiro J. P. Aillaud, com o mesmo título *Chronica do descobrimento e conquista da Guiné*.¹⁶ Entre 1896 e 1899, é publicada a primeira tradução da crónica em língua inglesa com o título de *The Chronicle of the Discovery and Conquest of Guinea*.¹⁷ Em 1927, em Lisboa, aparece uma edição com o título de *Coronica de Guynée*¹⁸ e, no ano de 1937, é publicada uma nova edição da obra de 1841, com a atualização do título para *Crónica do Descobrimento e Conquista da Gui-*

ca a grafia o nome do autor foi alterado para “Zurara.” Neste artigo, adotamos a denominação contemporânea de “Zurara.”

¹⁵Neste trabalho, a referência do título da obra de Zurara está reduzida para apenas *Crónica de Guiné*.

¹⁶Este exemplar pode ser encontrado na Biblioteca Nacional do Brasil. Ver: Gomes Eanes de Azurara, *Chronica do descobrimento e conquista de Guiné* (Paris: Va. J. P. Aillaud, Monlon e Ca, 1854); http://acervo.bn.gov.br/sophia_web/acervo/detalhe/1193670?guid=1577586457231&returnUrl=%2fsophia_web%2fresultado%2flistar%3fguid%3d1577586457231%26quantidadePaginas%3d1%26codigoRegistro%3d1193670%231193670&i=2

¹⁷G. Eanes de Zurara, *The Chronicle of The Discovery and Conquest of Guinea* (translated by Charles Raymond Beazley, introd. by Edgar Prestage), vols. 1 e 2 (London: Printed for the Hakluyt Society, 1896-1899). Uma segunda edição dessa tradução foi publicada somente em 1963, pela editora B. Franklin de Nova Iorque, e uma terceira edição em 2010, pela Ashgate.

¹⁸Essa edição consiste em fragmentos da crónica contendo apenas 48 páginas. Gomes Eanes de Zurara, *Coronica de Guynée* (Lisboa: Empr. da Revista Diogo-Cão, 1927); <http://id.bnportugal.gov.pt/bib/catbnp/1007681>

ne¹⁹. A segunda edição em inglês foi publicada em 1936, sendo o título, em relação à primeira edição naquela língua, alterado para *Conquests and Discoveries of Henry Navigator: Being the Chronicles of Azurara*²⁰. Em 1939, surge uma nova edição portuguesa organizada por Álvaro Júlio da Costa Pimpão, ‘*Cronica dos Feitos da Guinee*’ de *Gomes Eanes de Zurara e o manuscrito Cortez-D’Estrées: tentativa de revisão crítica*²¹. A partir da década de 1940, surgiram diversas novas edições em Portugal, como: *Crónica dos feitos de Guiné* (1942)²²; *Crónica dos feitos de Guiné* (1949)²³; *Crónica de Guiné* (1973)²⁴; *Crónica dos feitos notáveis que se passaram na conquista de Guiné por mandado do Infante D. Henrique* (1978-1981)²⁵; *Crónica do Descobrimento e Conquista da Guiné*²⁶, de 1989, como parte da coleção “A aventura portuguesa”; sendo no mesmo ano publicado o livro *Crónica dos feitos da Guiné* (1989)²⁷. A primeira edição na língua francesa apareceu somente em 1960, com o título de *Chronique de*

¹⁹Gomes Eanes da Zurara, *Crónica do descobrimento e conquista da Guiné* (Porto: Civilização, 1937).

²⁰Gomes Eanes de Zurara, *Conquests and Discoveries of Henry Navigator: Being the Chronicles of Azurara* (pref. de Marshal Lyautey, trad. de Bernard Miall, ed. Virginia de Castro Almeida) (London: Allen & Unwin, 1936).

²¹Gomes Eanes de Zurara and Álvaro Júlio da Costa Pimpão, *A ‘Cronica dos feitos da Guinee’ de Gomes Eanes de Zurara e o manuscrito Cortez-D’Estrées: tentativa de revisão crítica* (Lisboa: Casa do Livro, 1939).

²²Gomes Eanes de Azurara, *Crónica dos feitos da Guiné* (pref. selec. e notas Álvaro Júlio da Costa Pimpão) (Lisboa: A. M. Teixeira & Filhos, 1942).

²³Gomes Eanes de Azurara e António J. Dias Dinis, *Vida e obras de Gomes Eanes de Zurara* (Lisboa: Agência Geral das Colónias, 1949). Esta edição foi publicada em dois volumes, sendo o primeiro “Vol. I. Introdução à Crónica dos feitos de Guiné” e o segundo a crónica.

²⁴Essa edição foi publicada em 1973 como parte da coleção Biblioteca histórica – Série ultramarina. Além do mais, trata-se de uma revisão da edição de 1937 publicada pela mesma editora, todavia com a atualização do manuscrito de Denis para a linguagem contemporânea. Ver: Gomes Eanes de Zurara, *Crónica de Guiné* (introd., notas e novas considerações de José Bragança) (Porto: Civilização, 1973). Em 1994 aquela edição recebeu uma nova reedição. Ver: Gomes Eanes da Zurara, *Crónica de Guiné* (introd., notas e novas considerações de José Bragança) (Porto: Civilização, 1994).

²⁵Gomes Eanes de Zurara, *Crónica dos feitos notáveis que se passaram na conquista da Guiné por mandado do Infante D. Henrique* (introd. e notas de Torquato de Sousa Soares) (Lisboa: Academia Portuguesa de História, 1978-1981).

²⁶Gomes Eanes de Zurara, *Crónica do Descobrimento e Conquista da Guiné* (introd. e notas de Reis Brasil, Mem Martins) (Portugal: Europa-América, 1989).

²⁷Gomes Eanes de Zurara, *Crónica dos feitos da Guiné* (ed. Luís de Albuquerque e comentários de Torquato de Sousa Soares) (Lisboa: Alfa, 1989).

*Guinée: Gomes Eanes de Zurara*²⁸, integrando a coleção “Mémoires de l’Institut français d’Afrique noire”. Uma nova edição francesa foi publicada em 1994, com o título de *Chronique de Guinée: 1453*²⁹.

Apesar da relevância desse relato para os estudos dos descobrimentos e a expansão marítima portuguesa, demonstrável pelas diversas edições e traduções, até o ano de 1837, o manuscrito *Crónica de Guiné* encontrava-se desaparecido. Enquanto pesquisava na coleção de documentos ibéricos, armazenada na atual Bibliothèque Nationale de France, em busca de fontes para a elaboração do seu novo livro *Chroniques chevaleresques de l’Espagne et du Portugal*³⁰, o letrado francês Ferdinand Denis³¹ encontrou o até então desaparecido manuscrito de Zurara. Esse documento inédito na época, não foi o único manuscrito da *Crónica de Guiné* que sobreviveu às traças e extravios do tempo.³² Ele é considerado o mais completo³³, porém apresenta alguns pro-

²⁸Gomes Eanes de Zurara, *Chronique de Guinée: Gomes Eanes de Zurara* (préf. et traduction de Léon Bourdon avec la collaboration de Robert Ricard) (Dakar [Senegal]: Institut Français d’Afrique Noire, 1960).

²⁹Gomes Eanes de Zurara, *Chronique de Guinée: 1453* (présentée para Jacques Paviot et préface et traduction de Léon Bourdon avec la collaboration de Robert Ricard) (Paris: Chandeigne, 1994). Essa obra foi reeditada em 2011, ver: Gomes Eanes de Zurara, *Chronique de Guinée: 1453* (présentée para Jacques Paviot et préface et traduction de Léon Bourdon avec la collaboration de Robert Ricard) (Paris: Chandeigne, 2011).

³⁰Ferdinand Denis, *Chroniques chevaleresques de l’Espagne et du Portugal suivies du Tisserand de Ségovie, drame du XVIIe siècle*, Tome Second (Paris: Leydoyen, Libraire-Éditeur, 1839); https://archive.org/details/DELTA53574_2RES/page/n53

³¹Nessa época, Denis exercia a função de conservador da biblioteca Sainte-Genève. Para mais informações sobre esse letrado acessar o Projeto *France au Brésil*: www.bndigital.bn.gov.br/francebr/francês/ferdinand_denis.htm.

³²Alguns anos após o achado de Denis, outras cópias foram sendo descobertas. Segundo Maria Teresa Leitão Brocardo, esses manuscritos estão sem assinatura e foram produzidos em diferentes períodos. Sendo eles os seguintes: Cópia incluída no denominado Manuscrito Valentim Fernandes, que faz parte do *Codex Monacensis Hispanicus*, ms. n° 27 na Bayerische Staatsbibliothek, Handschriftenabteilung, de Munique, fols. 216’-269’ (produzido no final do séc. XV ou início do XVI); o Ms. n° 2424 na Biblioteca Nacional de Madrid (produzido no século XVII); e uma cópia no *Codes Hispanum* n° 102 na Bayerische Staatsbibliothek, de Munique (produzido no séc. XVIII). A cópia da Biblioteca de Madrid e Munique foram encontradas no mesmo ano de 1879. Maria Teresa Leitão Brocardo, “As edições das crônicas de Gomes Eanes de Zurara,” em *Actas do V Encontro da Associação Portuguesa de Linguística* (Lisboa: Faculdade de Letras da Universidade de Lisboa, 1990), 42-43.

³³Em Munique, no ano de 1846, a cópia da *Crónica* foi publicada conjuntamente com o restante do “Manuscrito de Valentim Fernandes” por Johann Andreas Schmeller, com o título de *Ueber Valentī Fernandez Alemā und seine Sammlung von Nachrichten über die Ent-*

blemas, como, por exemplo, dúvidas relativas à data de produção e originalidade do documento. Conforme Carvalho, apesar de constar, no manuscrito encontrado por Denis, a assinatura do ano de 1453, apenas alguns anos antes da morte do Infante D. Henrique, ocorrida em 1460, conjecturou-se que esse texto não tinha sido originalmente escrito naquela data.³⁴ Os primeiros a levantarem essa questão foram João Teixeira Soares de Sousa e Gama Barros. No decorrer do século XX, Duarte Leite, Costa Pimpão, José de Bragança e Vitorino Magalhães Godinho confirmaram as suspeitas daqueles dois estudiosos e, conforme as palavras de Carvalho, colocaram “de vez por terra aquilo que parecia evidente”, que a *Crónica de Guiné* não foi escrita em 1453.³⁵

A respeito da originalidade do manuscrito ou, sendo mais preciso, o problema da falta de homogeneidade do texto, constatou-se, através do exame de Duarte Leite e Costa Pimpão, que a *Crónica de Guiné* seria uma combinação de diversos textos compostos em diferentes épocas.³⁶ Além disso, apesar do próprio Zurara ter, em três momentos da sua *Crónica de Guiné*, explicado que utilizou no seu relato um manuscrito produzido por Afonso Cerveira, os estudiosos chegaram à conclusão que, além de Zurara e Cerveira, o relato teria tido mais autores. A partir dessas duas constatações, elaborou-se a hipótese de que Zurara “[...] teria escrito outra *Crônica* que não a ‘... dos feitos de Guiné’, e que teria sido a *Crônica dos feitos do Infante D. Henrique* (na linguagem de Costa Pimpão) ou o *Panegírico do Infante D. Henrique* (na linguagem de Duarte Leite)”. Segundo Carvalho, Zurara teria reunido os dois manuscritos para fazer uma “junção dos dois textos, intitulado-os *Crônica dos feitos de Guiné*”³⁷

deckungen und Besitzungen der Portugiesen in Africa und Asien bis zum Jahr 1508 [...] (a publicação pode ser acessada através deste endereço <http://mdz-nbn-resolving.de/urn:nbn:de:bvb:12-bsb10799923-8>). No ano de 1940 a Academia Portuguesa de História publicou uma edição em português com o título de *O Manuscrito Valentim Fernandes*. Conforme Carvalho, esse texto é uma cópia resumida do manuscrito de Paris descoberto por Denis. Essa cópia foi realizada por Valentim Fernandes [Alemão] em 1506, enquanto os manuscritos da Biblioteca de Madri e Munique são cópias parciais do relato encontrado por Denis. Joaquim Barradas de Carvalho, “As edições e as traduções da *Crônica dos feitos da Guiné*,” *Revista de História – USP* 30 (61) (1965): 181-182; <https://doi.org/10.11606/issn.2316-9141.rh.1965.123310>

³⁴Carvalho, “As edições,” 181-190; <https://doi.org/10.11606/issn.2316-9141.rh.1965.123310>

³⁵Joaquim Barradas de Carvalho, “A mentalidade, o tempo e os grupos sociais (Um exemplo português da época dos descobrimentos: Gomes Eanes de Zurara e Valentim Fernandes),” *Revista de História – USP* 7 (15) (1953): 37-39; <https://doi.org/10.11606/issn.2316-9141.v7i15p37-68>

³⁶Carvalho, “A mentalidade,” 38-39.

³⁷Carvalho, “A mentalidade,” 38-39.

Num trabalho recente do medievalista Miguel Aguiar, é possível constatar que esse debate em relação à originalidade e ano de produção da *Crónica de Guiné* ainda não teve um desfecho, nele o autor diz o seguinte:

[...] [a] *Crónica dos Feitos da Guiné*, provavelmente composta entre 1452 e 1453 (ou seja, ainda em vida do Infante D. Henrique), e com alterações até 1464, é aquela que suscitou mais problemas eruditos e acesas polémicas entre os especialistas (discutindo-se, entre outras coisas, a hipótese de resultar de uma fusão entre um livro dedicado aos feitos do Infante e uma narrativa centrada nas navegações e conquistas propriamente ditas.³⁸

Aguiar ainda ressalta, na nota de rodapé número 10, que o motivo de tão intensa discussão sobre o relato de Zurara ser ou não uma fusão de textos seria devido à vontade de “compreender, por exemplo, qual o papel do Infante D. Henrique enquanto personagem e auto-idealizador destas narrativas, questões que permanecem completamente em aberto e suscetíveis de debate”.³⁹ Portanto, se Zurara fundiu dois ou mais textos em um único manuscrito, conseqüentemente poderia ocorrer uma relativização do papel desempenhado pelo Infante D. Henrique nas navegações e explorações marítimas.⁴⁰

Retornando ao momento que Denis redescobriu o desaparecido manuscrito, foi somente através da publicação de seu livro *Chroniques chevaleresques de l’Espagne et du Portugal*, publicado no ano de 1839, que os portugueses tomaram conhecimento do achado.⁴¹ Nessa obra, ele comentou e transcre-

³⁸Miguel Aguiar, “As crónicas de Zurara: a corte, a aristocracia e a ideologia cavaleiresca em Portugal no século XV,” *Medievalista* 23 (2018): 5-6; <http://journals.openedition.org/medievalista/1580>

³⁹Aguiar, “As crónicas de Zurara,” 6.

⁴⁰Aguiar, “As crónicas de Zurara,” 6 assinala algumas bibliografias para o aprofundamento desse tema, além das produzidas pelos estudiosos mencionados na polémica, ele acrescenta o trabalho de Rita Costa Gomes, “Zurara and the Empire: Reconsiderin Fifteenth-century Portuguese Historiography,” *History of Historiography / Storia della Storiografia* 47 (2005): 56-89.

⁴¹Carvalho, “As edições,” 181, acredita que entre a descoberta do manuscrito, em 1837, até ao ano da publicação da obra de Denis, em 1839, os portugueses não souberam desse importante achado. Carvalho salienta que isso pode ser confirmado através do exame do artigo publicado por Alexandre Herculano na revista *O Panorama: jornal litterario e instructivo* (1837-1868). Herculano, que estava produzindo uma série de textos sobre os Historiadores Portugueses, quando chegou a vez de Zurara, não mencionou o descobrimento da *Crónica de Guiné*, inclusive cita que Zurara tinha escrito apenas três livros: *A tomada de Ceuta*, a vida de *D. Duarte de Menezes* e do *Conde D. Pedro*. Ver: Alexandre Herculano, “Historiadores Portuguezes: Azurara,” *O Panorama. Jornal litterario e instructivo da Sociedade Propagadora dos Conhecimentos Uteis* 3 (119) (10 de Agosto de 1839): 251; <https://hdl.handle.net/2027/pst.000053181718>. A conjectura de Carvalho também poderia ser confirmada pelo fato de

veu trechos sobre a sua descoberta:

Le fragment plein d'éloquence que l'on va lire est tiré textuellement d'une chronique du XV^e siècle, que l'on croyait perdue même en Portugal, et que l'auteur de ce livre a retrouvée à la Bibliothèque royale (sous le n^o 246, Suppl. Français) ; elle est intitulée simplement au catalogue *Chronique de la Conquête de Guinée* ; mais le manuscrit portugais ne porte point de titre. En réalité, c'est une histoire complète des découvertes primitives de don Henrique, le célèbre infant de Portugal, que, dans l'ordre des grands explorateurs, est le prédécesseur naturel de Christophe Colomb. Ce beau livre qui a toujours servi de guide à Barros, a pour auteur Gomez Eanez de Zurara, premier archiviste du royaume ; il fut écrit en 1453, par ordre d'Alphonse V, surnommé l'Africain. Ce prince ne fut pas toujours un chef habile ni un roi prudent, mais il eut la gloire d'encourager les lettres et de fonder à Lisbonne la première bibliothèque royale qu'on y eut vue. C'est du moins ce qu'atteste le beau manuscrit de la Bibliothèque royale ; il est dit textuellement à la dernière page : "Acabouse esta obra na livraria que este rei Affonso fez em Lixboa dezoito Dias de fevereiro; sendo scripta em este primeiro vellume por Joham Gonçalvez Scudeiro e scrivam dos livros do dito senhor rey. Ao qual senhor o muyto infindo benigno e misericordioso deos sempre quiera de boas obras e vertudes em muyto melhores de dias e annos de sua vida de bem e melhor acrescentar e lhe dar ffruito de bẽeçom comque lhe de sempre Graças e Louvores porque el hé seu fazedor e criador no anno de Jhu-Xpo de mil e quatro centos e cinquenta e tres annos. DEO GRACIAS."⁴²

Ce premier volume, je m'en suis assuré, est le seul qui ait été composé para Gomez Eanez de Zurara, sur les Conquêtes de Guinée; c'est du moins le seul qui

que no ano seguinte, em 1840, o editorial da mesma revista divulgou a seguinte nota: "Um acontecimento quasi fortuito nos impõe o dever de fazer um suplemento ao artigo impresso no numero 119 do Panorama acerca do segundo historiador portuguez, e tratando deste assumpto pedimos a devida vênia ao erudito autor de tal artigo. Alem das obras de Azurara, alli mencionadas, podemos acrescentar a chronica dos descobrimentos do infante D. Henrique, de que Barros se acusa de ter muito aproveitado. Até agora era opinião corrente que esta obra, da qual Barbosa se não esqueceu de fazer breve menção, levaria descaminho como outros muitos documentos importantissimos daquela idade. Comtudo existe na Bibliotheca Real de Paris, sob o numero 236 (*suppl. franc.*), um esplendido e mui antigo manuscrito portuguez, sem titulo, designado no catalogo = *Chronique de la Conquête de Guinée*, = e temos fundamentos para julgar ser a obra de Azurara, sendo um argumento quase sem replica o terminar ele justamente no ponto em que Barros, que tem acabado de o citar, deixa tambem este assumpto para se occupar de outro mui diverso". Ver: "Historiadores Portugueses IV: Gomes Eannes de Azurara," *O Panorama. Jornal litterario e instructivo da Sociedade Propagadora dos Conbecimentos Uteis*, 4 (140) (Jan/Dez de 1840): 15-16. <https://hdl.handle.net/2027/hvd.hnz6y8?urlappend=%3Bseq=445>

⁴²Esse trecho pode ser encontrado em Gomes Eannes de Azurara, *Chronica do descobrimento e conquista de Guiné* (Pariz: J. P. Aillaud, 1841), 463.

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A primeira edição da *Crónica da Guiné*, nesse contexto, com a introdução escrita pelo Visconde de Santarém, produziu um “impacto notável na geografia e na historiografia europeias e nacionais e nos estudos dedicados a Portugal e aos descobrimentos”⁷¹ Daniel Estudante Protásio salienta que isso poderia ser confirmado a partir das análises das cartas trocadas entre os letrados europeus, como Santarém, Denis, Richard Henry Major, Alexandre von Humboldt, Heinrich Schaeffer e Daussy Wappaus, desde o descobrimento do manuscrito e a sua utilização como legitimação da prioridade dos descobrimentos após a sua primeira edição.⁷²

Como mencionado, a obra de Zurara preencheu um vazio da História de Portugal, além de, ao mesmo tempo, possibilitar a legitimação do domínio, através da prioridade do descobrimento dos portugueses sobre os territórios ultramarinos que se encontravam em disputa. O primeiro deles eram as terras do rio Casamansa, no que é hoje o atual Senegal. Utilizando o trabalho de Maria Luísa Esteve⁷³, Protásio afirma que aquele território vinha sendo objeto de negociação desde o século XVIII, sendo também foco de interesse no reinado de D. Miguel, em 1831. Na disputa pelo reconhecimento dessas terras, em 1836, ocorreu o encontro entre os representantes diplomáticos de Portugal e da França, primeiro em Paris e depois em Londres. Fizeram parte dessas negociações o Barão da Torre de Moncorvo, o Visconde da Carreira e o Visconde de Santarém⁷⁴. A estratégia daquele último era estabelecer a legiti-

⁷⁰Cardeal Saraiva, *Reflexões Geraes Acerca do Infante D. Henrique e dos Descobrimentos de que elle foi autor no seculo XV* (Lisboa: Imprensa Nacional, 1840). <https://archive.org/details/reflexesgeraesoolisb/page/1>

⁷¹Daniel Estudante Protásio, “2.º Visconde de Santarém 1791-1856,” *Leitores de mapas: dois séculos de história da cartografia em Portugal*, coord. Francisco Roque de Oliveira (Lisboa: Biblioteca Nacional de Portugal; Centro de Estudos Geográficos da Universidade de Lisboa; Centro de História de Além-Mar da Universidade Nova Lisboa e da Universidade dos Açores, 2012), 47.

⁷²Daniel Estudante Protásio. “2.º Visconde de Santarém,” 47.

⁷³Maria Luísa Esteve, *A questão do Casamansa e a delimitação das fronteiras da Guiné* (Lisboa: Centro de Estudos de História e Cartografia Antiga, 1988).

⁷⁴Na época, devido ao resultado desfavorável para o seu partido nas Guerras Liberais (1832-1834), o Visconde de Santarém encontrava-se exilado em Paris, contudo ele ainda continuava interessado na questão de Casamansa, particularmente, em razão da experiência que adquiriu sobre a questão durante o período que foi Secretário de Estado e Ministro dos Negócios Estrangeiros de D. Miguel.

midade da posse portuguesa de Casamansa, contra os interesses dos franceses, através de “argumentos históricos e documentais”⁷⁵

Portanto, foi nesse contexto que ocorreu o descobrimento e primeira edição da *Crônica de Guiné*, propiciando o elemento que faltava para redescobrir, dessa vez através da pena e papel e não das caravelas, as terras descobertas nos séculos anteriores. Por conseguinte, a primeira edição daquele manuscrito veio acompanhada por outros materiais, que serviriam para reforçar a sua autenticidade e legitimidade de conteúdo. Primeiramente, a citada Introdução àquela primeira edição feita pelo Visconde de Santarém, em que ele inicia a apresentação da crônica desta forma:

É pois a esta singular e gloriosa excepção que devemos o precioso monumento que vamos dar pela primeira vez ao publico: a *Chronica da Conquista de Guiné* por *Gomes Eannes d'Azurara*, escripto que é incontestavelmente não só um dos monumentos mais preciosos da historia da gloria portugueza, mas tambem o primeiro livro escripto por autor europeu sobre os paizes situados na costa occidental d'Africa além do Cabo *Bojador*, e no qual se coordenarão pela primeira vez as relações de testemunhas contemporaneas dos esforços dos mais intrepidos navegantes portuguezes que penetrarão no famoso mar *Tenebroso* dos Arabes, e passarão além da meta que té então tinha servido de barreira aos mais experimentados marítimos do Mediterraneo, ou das costas da Europa.

Com effeito tendo sido os Portuguezes os primeiros descobridores dos paizes situados além do Cabo *Bojador*, a honrosa missão de primeiro recontar estes descobrimentos competia a um Portuguez.⁷⁶

Outro material de acompanhamento, escrito também pelo Visconde de Santarém, foi publicado em 1841 na cidade de Paris. No ano seguinte, em 1842, o Visconde de Santarém publicou outro trabalho, dessa vez escrito em francês. O título do primeiro é *Memoria sobre a prioridade dos descobrimentos portuguezes na costa d'Africa occidental: para servir de illustração à chronica da conquista de Guiné por Azurara*, já o segundo livro recebeu o título de *Recherches sur la priorité de la découverte des pays situés sur la côte occidentale d'Afrique, au-delà du Cap Bojador, et sur les progrès de la science géographique, après les navigations des portugais, au xve siècle; par Le Vicomte de Santarem. Ac-*

⁷⁵Daniel Estudante Protásio, “Os intelectuais portugueses e a questão de Casamansa (1839-1843),” *Cadernos Barão de Arêde: Revista do Centro de Estudos de Genealogia e Heráldica Barão de Arêde Coelho* 6 (2015): 14-16.

⁷⁶Santarém, “Introdução,” vii-viii.

compagnées d'un Atlas composé de mappemondes et de cartes pour la plupart inédites, dressées depuis le XI^e jusqu'au XVII^e siècle.

No início de seu livro, o Visconde de Santarém enfatiza a primazia dos portugueses na exploração da costa Atlântica do continente africano. Segundo afirma, cabe a Portugal “a prioridade da passagem do cabo Bojador pelos Portuguezes, e os primeiros descobrimentos desta nação na costa Occidental d’Africa [...]”. O restante dos europeus apenas tomaram conhecimento de como fazer a viagem devido ao fato de pilotos portugueses, “munidos de cartas nauticas portuguesas”, terem traído o seu reino e “forão ensinar a derrota daquellas paragens a aventureiros estrangeiros, e os conduzirão áquellas regiões, desde então esses aventureiros aprenderão o caminho que té alli absolutamente ignoravão [...]”.⁷⁷ A versão francesa é praticamente semelhante à portuguesa, contudo, para a validação da prioridade das navegações portuguesas naquele país, na língua dos principais contestadores dessa legitimidade, o Visconde de Santarém modifica alguns trechos, tal como, nesta passagem que segue:

*Azurara dans la Chronique de la conquête de Guinée rapportant les motifs qui avaient décidé l’infant Don Henri à envoyer à la découverte des terre de Guinée, s’exprime de de la manière suivante “[...] Et parce qu’il désirait savoir quelle terres se trouvaient au delà des îles Canaries et d’un cap qu’on nomme Bojador, car jusqu’à ce temps-là ni par les écrits, ni par la tradition des hommes on ne savait positivement quel pays il y avait au delà de ce cap.”*⁷⁸

Verifica-se que a citação escolhida pelo Visconde de Santarém, para apresentar a *Crónica de Guiné* aos leitores franceses, revela o desejo do Infante D. Henrique em explorar os territórios para além do cabo Bojador, desconhecidos para os europeus da época. Por conter fatos relativos ao movimento dos europeus na agregação de conhecimento sobre a geografia do mundo que, por sua vez, permanecia inalterado desde a antiguidade, assevera o diplomata português que “le témoignage de ce chroniqueur est de la plus grande importance pour l’histoire”. Sendo essa importância histórica, da prioridade dos

⁷⁷Santarém, *Memoria sobre a prioridade*, v-vi.

⁷⁸Santarém, *Recherches sur la priorité*, 60-61. “Azurara na Crónica da Conquista de Guiné relatando as razões da decisão do infante D. Henrique em enviar à descoberta das terras de Guiné, exprime-se da seguinte forma “[...] E porque quis saber quais terras ficavam para além das Ilhas Canárias e um cabo chamado Bojador, porque até então nem pelos escritos, nem pela tradição dos homens não se sabia com certeza qual país havia além deste cabo” (tradução própria).

descobrimientos portuguesas, respaldada pelas “règles de la critique”⁷⁹, o Visconde de Santarém pode, logo adiante no seu livro, afirmar que:

[...] il est donc évident que ni *Azurara*, ni Alphonse Cerveira, dont le premier copia les relations qui existaient de son temps sur les découvertes faites en Afrique, ne pouvaient ignorer que les Normands y avaient fondé antérieurement les prétendus établissements dont il s'agit ; et cependant *Azurara* n'en dit pas le moindre mot, et tous les navigateurs qui ont exploré l'Afrique depuis le cap Bojador jusqu'au-delà de la ligne équinoxiale gardent à ce sujet le même silence, et ne parlent en aucune manière des vestiges qu'ils auraient dû y trouver du séjour d'un peuple quelconque de l'Europe. Nous citerons encore un autre écrivain contemporain, c'est-à-dire du XV^e siècle, *Louis Cadamosto*, lequel n'étant pas Portugais ne saurait être taxé de partialité, et doit avoir un grand poids dans tout ce qu'il dit concernant ce sujet.⁸⁰

Além dos paratextos e os dois livros do Visconde de Santarém, outro material legitimou a primeira edição do manuscrito de Zurara, sendo também diretamente relacionado ao conflito de Casamansa. Esse material foi um livro cujo título é igual ao publicado pelo Visconde de Santarém *Memoria sobre a prioridade dos descobrimientos dos portugueses na costa Occidental d'Africa*⁸¹. Contudo, esse livro tem algumas diferenças em relação ao publicado pelo diplomata: não apresenta o subtítulo “para servir de illustração à chronica da

⁷⁹A justificativa para o cuidado no transunto da crônica é enumerada da seguinte maneira: “1^o Parce qu'il était contemporain; 2^o parce qu'il a écrit sur des documents authentiques; 3^o parce que ce fut un des hommes les plus judicieux et les plus savants non seulement de sa nation, mais même de son temps; 4^o parce qu'il cite avec connaissance de cause beaucoup de faits de l'histoire de France ; et qu'en outre il fait voir qu'il connaissait beaucoup d'ouvrages français des deux siècles précédents, conséquemment du XIV^e siècle, dans le courant duquel des écrivains français tout récents prétendent que les Dieppois fondèrent des établissements sur la côte de l'Afrique occidentale” [...]. Santarem, *Recherches sur la priorité*, 60-61.

⁸⁰Santarém, *Recherches sur la priorité*, 61. “[...] É óbvio, portanto, que nem *Azurara*, nem Alphonse Cerveira, o primeiro dos quais escreveram os relatos que existiram no seu tempo sobre as descobertas feitas na África, não podiam ignorar que os normandos já haviam ali fundado os tais estabelecimentos; no entanto, *Azurara* não diz nenhuma palavra sobre isso, e todos os navegadores que exploraram a África desde o Cabo Bojador até além da linha equinocial mantêm o mesmo silêncio sobre este assunto, não falam de forma alguma sobre vestígios que teriam encontrado da existência de algum povo da Europa. Citaremos mais um escritor contemporâneo, isto é, do século XV, Luís Cadamosto, que, não sendo português, não pode ser acusado de parcialidade, e deve ter um grande peso em tudo o que diz a respeito do tema” (tradução própria).

⁸¹Academia de Ciências de Lisboa, *Memoria sobre a prioridade dos descobrimientos dos portugueses na costa occidental d'Africa* (Porto: Imprensa da Revista, 1842).

conquista de Guiné por Azurara”; foi publicado no ano de 1842; e as editoras são diferentes – a de Santarém foi a J.-P. Aillaud (a mesma que publicou o manuscrito de Zurara), de Paris, enquanto o outro foi publicado pela Imprensa da Revista, do Porto.⁸²

Abaixo segue um longo, porém necessário trecho para entender a pertinência do conflito internacional sobre a soberania de Casamansa entendido a partir da perspectiva portuguesa oitocentista:

Ahi prova o distincto Escriptor [o Visconde de Santarém], assás conhecido na Litteratura diplomática por suas respeitáveis produções, com argumentos inconcussos assim historicos, como criticos, e geograficos, que a gloria da prioridade de taes descobrimentos pertence sem hesitação aos Portuguezes; e por tão convincente maneira demonstra o illustre Visconde a exactidão desta proposição, que nos parece impossivel que alguém possa resistir a suas demonstrações, ficando assim reduzida á nullidade a actual pretensão dos Francezes, fundandose nas asserções de *Villaut*, do *P. Labat*, e d’outros; asserções que são inteiramente vagas, e destituidas de provas. Por esta maneira está o governo portuguez habilitado para instaurar reclamações legitimas ácerca dos estabelecimentos que sobre taes fundamentos foram os Francezes do Senegal em 1829 fundar uma pequena Ilha, denominada Ito, ou *Ilhéu dos Mosquitos*, situada no N. da foz do rio Casamansa. Para obstar ao progresso Manoel Antonio Martins, de Cabo Verde, de fazer um estabelecimento na foz do dito rio, e outro na Ilha de Bolama, concedendo-se-lhe em compensação o monopolio da aguardente nas Ilhas de Cabo Verde. Foi este monopolio effectuado, mas por parte do monopolista não se completou o contracto, porque apenas s’edificou um pequeno forte no lugar de Bolor, situado em uma das embocaduras secundarias do Casamansa.

Em 16 de Março de 1837 fiseram os Franceses do Senegal nova invazão, subindo pelo Casamansa, e indo fundar outra feitoria na margem esquerda do rio, no sitio da aldêa de *Sebus Selbo* chamada *sebion* por elles, situada dez leguas (30 milhas inglesas) do antiquissimo estabelecimento portuguez de Zenguichor, que se acha sobre o rio nas terras dos Banhús, a 20 leguas da barra, e em uma situação mui vantajosa para o commercio, porque communica pelo interior com o rio Gambia, de que o Casamansa é um braço, sem sahir fóra da barra; e com Cachéo e Bolor pelos pequenos rios de Bujeto e Guinguim. Foi este acto praticado pelo Governador da Ilha de Goréa, acompanhado d’alguns negociantes francezes, indo a bordo d’uma pequena embarcação de guerra, *l’Aigle d’on*; a qual abordando ao porto de Zenguichor, o governador portuguez deste estabelecimento, Carvalho d’Alvarenga, quis oppôr-se á sua passagem; porem com a ameaça que o

⁸²Até a publicação deste artigo, não foi encontrado qualquer referência àquele material nas bibliografias que consultadas durante à pesquisa.

Governador de Goréa fez de atirar sobre o posto portuguez, que se acha apenas defendido por uma estacada, e tres fortes de barro com 3 peças incapazes e sem carretas, ou reparos, e com uma guarnição de apenas 9 soldados (!!), o commandante do posto cedeu á força, e protestou em devida forma em 17 do mesmo mez, convidando a assistir ao protesto o commandante da embarcação franceza, no que elle consentio, mas não em assignar o protesto.

Debalde o governador de Guiné protestou tambem contra esta nova usurpação; os Francezes procuram cohenestal-a disendo que haviam comprado aos Negros Mandingas o terreno em que estabeleceram a feitoria; mas é sem duvida que os direitos de descobrimento e possessão, constantemente reconhecidos como pertencentes a Portugal, foram invadidos pelos Francezes.

Seremos ainda mais prolixos sobre este assumpto, porque achando-nos sufficientemente habilitados para desta historia dar amplo conhecimento a nossos concidadãos, julgamos este o nosso dever.

Allegam os Francezes ter exercido direitos effectivos de soberania, de posse, e de commercio desde o Cabo Branco até o rio da Serra Leôa, bem como em Cacheu, Bissagós, e Casamansa; e fundam o seu direito nas relações de Villaut, do P. Labat, e da *Notice historique sur le Senegal*, de que já fallamos; e sobre o que conta Villaut, e o copia Dapper: que “*alguns annos ha que os Hollandezes reparando uma bateria, que se chama a bateria dos Francezes, porque segundo a opinião dos originarios do paiz os Francezes o tinham dominando antes dos Portuguezes, acharam gravados os numeros 13., sendo impossivel distinguir os dous outros.*” e com taes provas se julgam auctorizados para invadir estas regiões, cujo incontestavel dominio pertence á Nação Portugueza! mas que valor poderiam ellas ter sem o direito da força!!

E’ comtudo d’esperar que a achada da Chronica do descobrimento e da conquista da Guiné de Gomes Eanes d’Azurara, e os inconcussos argumentos produzidos pelo eruditissimo Visconde de Santarem na citada Memoria, contribuam precisamente para que o governo francez reconheça a injustiça de sua pretensão, e restitua a posse do terreno que occupa a quem della tem o mais incontestavel direito [...].⁸³

Nessa passagem é estabelecida a conexão entre o território em disputa com a obra de Zurara e a *Memória sobre a prioridade dos descobrimentos portugueses na costa Occidental d’Africa* publicada pelo Visconde de Santarém. Além disso, semelhantemente aos outros textos que acompanharam a primeira edição da *Crónica de Guiné*, as descobertas são consideradas feitos extraordinários. Para os letrados oitocentistas, empenhados na divulgação des-

⁸³Academia de Sciencias de Lisboa, *Memória sobre a prioridade*, 3-6.

se material, a “gloria da prioridade de taes descobrimentos pertence sem hesitação aos portugueses”. Esta atitude pode ser analisada por um duplo viés, uma vez que, primeiramente se estabelece uma identificação e uma identidade comum em relação às conquistas, como sendo ligadas a um tempo glorioso de Portugal, e, também, uma potente prova para os inimigos da nação, no caso, para os injustos franceses, de que a “Nação Portuguesa” tem o “incontestavel direito” sobre as terras do ultramar descobertas pelo “gênio português”.⁸⁴ A obra de Zurara, portanto, torna-se parte integrante da identidade portuguesa, uma vez que, permite, através da legítima e autêntica evidência das fontes históricas, o reconhecimento, por parte das outras potências europeias, da primazia das explorações marítimas da nação portuguesa.

Considerações finais

A análise do manuscrito encontrado por Ferdinand Denis, em 1837, na Bibliothèque Nationale de France, possibilitou que compreendêssemos a relevância da primeira edição impressa desse texto naquele contexto histórico. Assim, principalmente ao se levar em consideração o esforço da edição e divulgação daquele inédito material, seguido pela própria apresentação e notas feitas pelo Visconde de Santarém, além dos livros publicados como acompanhamento da edição de 1841, chegamos à conclusão da importância dessa crónica para a fundamentação da identidade portuguesa e da historiografia dos descobrimentos e expansão marítima daquela nação. Um dos pontos que merece destaque é o orgulho que os portugueses provavelmente sentiram pelos prodigiosos feitos efetuados no descobrimento de rotas marítimas e contato com outros povos. Dessa forma, pensando no impacto da leitura da crónica de Zurara entre os contemporâneos daquele período, em que a obra teve a sua primeira edição, entenderemos a ligação afetiva dos intelectuais referidos para com aquele glorioso passado. Além disso, destaca-se que o caso do manuscrito e primeira edição da *Crónica de Guiné* é singular pela sua utilidade política, tendo sido empregado para justificar a prioridade portuguesa nos territórios ultramarinos disputados num conturbado ambiente europeu. Naquela época, ainda eram poucos os documentos e relatos da era das navegações disponíveis, e isso constitui outro aspecto que torna relevante as edições dos manuscritos do período dos descobrimentos.

⁸⁴Academia de Ciencias de Lisboa, *Memória sobre a prioridade*, 3.

Importa notar que o reconhecimento de determinadas características associadas à identidade portuguesa oitocentista teve a maior importância na conjuntura das relações externas de Portugal, uma vez que o reino, em razão da perda da América Portuguesa e as Guerras Liberais, encontrava-se internacionalmente debilitado e fragilizado perante o constrangimento das potências europeias ocupando o que restava do Império português. Nesse sentido, a partir da análise da primeira edição da *Crónica de Guiné*, pode-se perceber seu papel no cenário diplomático do período, ao demonstrar a relevância e a prioridade das navegações portuguesas para o restante da Europa.

A Statue of Guilt: Memory as a Painful Reminder in *Caderno de Memórias Coloniais* (Notebook of Colonial Memories) by Isabela Figueiredo

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WHEN WRITING ABOUT LITERATURE produced by women that reflects the realities of the Portuguese colonial war, Isabel Allegro de Magalhães highlights some particularities and innovations specific to those works: “[...] let us consider some of these innovative features. If we look at the theme of the colonial war, as it appears in [...] novels written by women, keeping in mind other novels on the same event by male authors, we get the impression we are reading about a *different* war.”¹

In her article, she differentiates between what is written by women and by men regarding the topic of the war, advancing that those books which are authored by women present a noticeably different, but equally important, perspective. Following her logic, this article intends to advance a similar claim, not for works that deal with the war, but with those (one, in particular) which deals with the *post-war*, or rather, more specifically, with *post-memory*. Therefore, by adopting de Magalhães’ claim and adapting it to the current object of analysis, it can be affirmed that when we are reading novels such as the one presented here, we are reading about a *different* post-war, one that is not concerned with the aftermath of war specifically, but rather with the aftermath of an experience: a memory. We are reading about *post-memory*.

This is particularly noticeable in the case of novelist Isabela Figueiredo, specifically in her novel *Caderno de Memórias Coloniais* [Notebook of Colonial

¹Isabel Allegro de Magalhães, “Portuguese Fiction Written by Women after April 1974: Some Innovative Features,” *Portuguese Studies* 10 (1994): 18.



Memories]. The novel, first published in 2009 to critical acclaim, is an autobiographical account of the author's childhood in colonial Mozambique, of growing up in a family of committed colonialists, particularly her father. Her father is very prominent in the novel, an almost silent but ever-present figure.

Figueiredo's book can be seen as a landmark in Portuguese literature, as it strives to open new paths for coming to terms with the country's recent past, by challenging certain mythologies and received truths. The uniqueness of her memory is particularly relevant because it is an attempt to manifest the singularity of her voice. Not only is she on the receiving end of a problematic vicarious memory, she also does not seem to have fully come to terms with her own individual memory. Therefore, in order to better understand Figueiredo's unique memory (and the writing generated by it) it is helpful to articulate her text with Marianne Hirsch's concept of *postmemory*. When defining *postmemory* in relation to the children of Holocaust survivors, Hirsch clarifies that:

[...] the power of mourning and memory, and the depth of the rift dividing their parents' lives, impart to them something that is akin to memory. Searching for a term that would convey its temporal and qualitative difference from survivor memory, I have chosen to call this secondary, or second-generation, memory "postmemory."²

The concept, albeit concerned with the particular topic of the Holocaust, is nevertheless an apt description of Figueiredo's memory. As well as being a direct memory (her own experience), it is also a memory that has been formed in a rift, given the extent to which the memory of her father is linked with the memory of her traumatic past. The main difference is that most commonly, those to whom Hirsch's definition can be applied are on the side of the victims and not on the side of the perpetrators, as in Figueiredo's case. However, by not sharing her father's ideals (i.e., colonialism) but still having had to witness the effects of a repressive political system (embodied by her father), the importance of viewing the troubles of her *postmemory* cannot be minimised. It is by considering the author's writings in the realm of *postmemory* (and not mere autobiography) that we allow her work's full literary strength to show itself, its emotional investment and the

²Marianne Hirsch, "Past Lives: Postmemories in Exile," *Poetics Today* 17 (4) (1996): 662.

power of its account to shine through. No one other than Hirsch herself could support this claim, as she does in her wider definition of the concept of *postmemory*:

Postmemory is a powerful form of memory precisely because its connection to its object or source is mediated not through recollection but through an imaginative investment and creation. That is not to say that memory itself is unmediated, but that it is more directly connected to the past. Postmemory characterizes the experience of those who grow up dominated by narratives that preceded their birth, whose own belated stories are displaced by the stories of the previous generation, shaped by traumatic events that can be neither fully understood nor re-created. I have developed this notion in relation to children of Holocaust survivors, but I think it may usefully describe the second-generation memory of other cultural or collective traumatic events and experiences.³

Isabela Figueredo was born in Lourenço Marques, now Maputo, capital of Mozambique, in 1963. In 1975, one year after the revolution that overthrew *Estado Novo*'s dictatorial regime in Portugal, Isabela's parents sent her to live with her aunt in Lisbon. Her parents' main concern had been, seemingly, her safety. They feared that she would be victim to the violent backlash against the (colonialist) whites which broke out after the liberation of the country.

However, this concern masked another preoccupation, something more sinister and insidious. Before allowing her to depart (and separate herself for good from the country which was effectively her homeland), they gave her the double mission of getting an education and being a vocal witness to the supposed atrocities and violence against the colonial whites. She had to tell the truth: "Não te esqueças do que tens de contar. [...] Está tudo nas tuas mãos. [...] Coragem. Não te esqueças de contar a verdade."⁴ [Don't forget what you have to tell. [...] Everything is in your hands. [...] Courage. Don't forget that you have to tell the truth.]⁵

Thus, she had been burdened with the role of not only witnessing, but also retelling, their colonial ideology and their perceived injury. By doing so without allowing her own narrative, her own choice in what would be made of her memory, she ends up rejecting her parents' forced narrative, a rejec-

³Hirsch, "Past Lives: Postmemories in Exile", 662.

⁴Isabel Figueiredo, *Caderno de Memórias Coloniais* (Coimbra: Angelus Novus, 2010), 104.

⁵All translations in this article are mine.

tion which inevitably contributed to a crisis of identity. It is here that the fundamental schism that motivates and animates her work can be found. Her identity was to be forever trapped in that bipolar space between her affection for her parents (her father in particular) and her own mental truths (her human and political ideals). Margarida Calafate Ribeiro, reflecting on the author's work, has aptly made similar observations:

[...] aqui reside a cisão, manifesta na impossibilidade de amor, pela traição, que o livro de Isabela Figueiredo a tanto custo grita e que, no limite, o torna trágico. Aquele pai de quem ela dificilmente se despegou no aeroporto de Lourenço Marques, estava, como Lourenço Marques e a sua infância, perdido para sempre e, por isso, é solicitado à narradora quando parte para a metrópole que dê testemunho do que estava a acontecer aos brancos, do que estava a acabar naquele ponto português do Índico [...]. Mas o testemunho que a narradora é capaz de emitir não é aquele que os futuros retornados que se despediram da menina filha do electricista no aeroporto de Lourenço Marques, insistiram para que ela contasse, para que ela cumprisse o seu papel de testemunha [...]⁶

[...] here lies the schism, manifested in the impossibility of love, in betrayal, that Isabela Figueiredo's book desperately screams and that, in its limit, becomes tragic. That father whom she barely was able to let go at Lourenço Marques's airport, was, like Lourenço Marques itself and her childhood, lost forever and, thus, it is asked of the narrator that upon her departure to the metropolis, she will give her testimony about what was happening to the whites, what was coming to an end in that Portuguese spot in the middle of the Indian Ocean [...]. But the testimony that the narrator is capable of delivering is not one that the future *retornados* who have said goodbye to the electrician's little girl at Lourenço Marques's airport, insisted that she tells in order to fulfil her role of witness [...]

As Figueiredo had realised previously and confirmed by her parents' message: "O tempo dos brancos tinha acabado."⁷ [The time of the whites has come to an end.] She, however, did not come to this sense of ending via her parents' ideology. Even though she did not espouse their ideals, with the process of decolonisation, she herself was also going to have to go through a sort of closure. For her, this would mean a physical separation from the country of her birth, the end of her childhood and an abrupt awakening to

⁶Margarida Calafate Ribeiro, "O Fim da história de regressos e o retorno a África: Leituras da literatura contemporânea Portuguesa," *Itinerâncias: Percursos e representações da pós-colonialidade* (2012): 95.

⁷Isabela Figueiredo, *Caderno de Memórias Coloniais*, 88.

adulthood. It is this simultaneous and sudden disappearance of so many dimensions of her own self, combined with the problematic arrival to a Portuguese society, which did not care about those who were returning, that perhaps triggered the sense of inner displacement that is voiced in the novel.

This displacement is undoubtedly connected with the articulation of memory, a task that is clearly painful for her, as has been pointed out by Koblucka and Rothwell who noted that the novel's

primary narrative substance emerges from the writer's complex exercise of remembrance, reconstruction and fictionalization of her experience in both Mozambique and Portugal. As a bildungsroman of sorts, Notebook chronicles the expectable milestones of its young protagonist's development, such as her sexual education and learning to read. However, what both the remembering woman and the experiencing child and adolescent are most concerned with is the unveiling and exploration of the everyday workings of colonial reality, with its core principles of inflexible racial hierarchy and unquestioned white privilege.⁸

Figueiredo's writing, despite not entertaining nostalgic musings and being free of the melancholic entrapments typical of writings of colonial nostalgia, does nevertheless display a sense of loss, not a nostalgic yearning but a rather sad coming to terms with an inevitable reality. "Quando o avião tomou altura houve dentro da cabina um silêncio fundo [...]. Em silêncio, mas num silêncio ainda mais fundo, [...] voltei a chorar o que perdia e que haveria de pagar."⁹ [When the airplane gained altitude there was a deep silence inside the cabin [...]. In silence, but in an even deeper silence, [...] I cried once again for what I had lost and for what I would have to pay.].

However, not long after this incursion into her inner sadness, she announces (as a closing statement to the chapter): "Nunca entreguei a mensagem de que fui portadora."¹⁰ (I never delivered the message I was tasked with). This statement, being the last sentence of the chapter, becomes a powerful reminder that the author's emotional attachment to her parents, and to Mozambique, does not denote an empathy for the colonialist ideals.

⁸Anna Koblucka and Philip Rothwell, trans., "Introduction," in Isabela Figueiredo, *Notebook of Colonial Memories* (Massachusetts Dartmouth: Luso-Asio-Afro-Brazilian Studies & Theory, 2015), 12.

⁹Figueiredo, *Caderno de Memórias Coloniais*, III.

¹⁰Figueiredo, *Caderno de Memórias Coloniais*, III.

By stating that she never delivered the message as she was asked to, the author is also making a statement about her own identity. The locus of her identity conflict is not in her political ideas or in the mental realm of her beliefs. It is, rather, in an emotional space which, despite its difficulty in being precisely defined, is nevertheless clearly felt as an absence: “Havia de ser ridículo. [...] Dentro de mim uma terra da qual sou desterrada.”¹¹ [It must have been ridiculous. [...] Inside me existing a place from which I am displaced].

In this passage, one word, often repeated throughout the novel, must be highlighted: “*desterrada*.” Given this separation from the country (from the continent even) which formed her young identity, she is, then, a “*desterrada*”, a displaced person. In the original Portuguese, the word takes a very concrete dimension, literally meaning not only that one without place but one *without earth*.

The importance of this word is twofold. Firstly, it is simply (but effectively) a description of the condition of her identity. Both her outer and inner realities are forced out of place, into a kind of limbo, a neither-here-nor-there plane of existence. To her actual physical departure, she also joins a mental departure, motivated by the rejection of what colonialism (and her parents) stood for:

Dali para fora. A andar. Rápido. Queria, como uma criminosa de guerra, voltar costas a toda aquela esquizofrenia que não me permitia ser legitimamente quem eu era nem viver com o que eles eram. Precisava de uma identidade. [...] Sou isto, pronto, sou isto, assim, agora, olhem, arranjem-se.¹²

[Out of there. On my way. Fast. I wanted, like a war criminal, to turn my back to all of that schizophrenia which did not permit me to legitimately be who I was nor to live with what they were. I needed an identity. [...] I am this, then, I am this, thus, now, look, get over it.]

Significantly, it is the metaphorical comparison of her situation with the diagnosis of schizophrenia¹³ that perhaps serves as the most apt to describe the identity of a displaced person. Indeed, by using R. D. Laing’s critical in-

¹¹Figueiredo, *Caderno de Memórias Coloniais*, 133.

¹²Figueiredo, *Caderno de Memórias Coloniais*, 102-103.

¹³And in this article, it is only metaphorically that any mention to schizophrenia exists. I have no intention of medicalising the text or its author. The term is being used to examine her split relationship with her father, colonialism, and postcolonialism and its result in the formation of her own split identity.

sights into schizophrenia, the term *schizoid* perfectly describes the author's sense of identity:

The term schizoid refers to an individual the totality of whose experience is split in two main ways: in the first place, there is a rent in his relation with his world and, in the second, there is a disruption of his relation with himself. Such a person is not able to experience himself 'together with' others or 'at home in' the world, but, on the contrary, he experiences himself in despairing aloneness and isolation; moreover, he does not experience himself as a complete person but rather as a 'split' in various ways, perhaps as a mind more or less tenuously linked to a body, as two or more selves, and so on.¹⁴

The characteristic split displayed by schizoid persons, as it appears here described by Laing, seems to be the same as the split manifested by displaced persons. In Figueiredo, we also find a disruption with her sense of self and in her relationship with reality. But her work is not the only one to display this. As Isabel Moutinho points out:

Portuguese fiction of the final quarter of the twentieth century often portrays a society whose image of itself and its role in the world has been torn apart by the loss of its African empire. Many of the novels of the 1980s and 1990s show a recurring concern with the fragmentation of self [...].¹⁵

Moutinho's claim precedes the publication of *Cadernos*, and although it is aimed at works by novelists such as António Lobo Antunes (where this *fragmentation of self* is particularly visible) and others, it does not lose its analytical power in regard to Figueiredo. To the contrary, it continues to resonate, and is even strengthened by Figueiredo's novel. The novelist's achievement is not only to keep writing about one of the most important topics of post-modern Portuguese literature, but even and especially to widen it, to expand it into dimensions not yet explored. Therefore, Figueiredo is pushing the boundaries of the necessary dialogue in which contemporary Portuguese society must continue to engage. Fundamentally, she brings into the fore the specific realities of her personal and intimate experiences as her main effort to engage herself and her readers in the constant revaluation of Portuguese *collective* identity. Again, Isabel Moutinho's considerations on the literary panorama of post-revolution Portugal awards Figueiredo's novel in

¹⁴R. D. Laing, *The Divided Self* (London: Penguin Books, 2010), 17.

¹⁵Isabel Moutinho, "Re-imagining a National Identity in Portuguese Contemporary Narrative," *Mester* 33 (1) (2004): 19-20.

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As Koblucka has pointed out,

[t]he writer's conflation of the political space of colonialism with the intimate sphere of the colonizer's family— her own— suggests that the conditions of possibility for the emergence of xenophilic anticolonial affect can only be reached by way of a ruthless denial of the comforts offered by self-affirmation within the order of the same.³⁹

Therefore, the role of active witness in her writing cannot be minimised. It is indeed this trait that makes it one of the most important books about post-colonial return. It transcends mere autobiography in its attempt to close the gap, the split, afflicting the problematic identity of the narrator. Figueiredo's experience (and identity) is certainly shared by many other people and so, despite being largely autobiographical, the text contributes to the formation of an alternative collective narrative; that of the displaced, of the "desterrados."

As a literary piece, its value lies in the fact that it explores a less common topic in the realities of post-colonial legacy (at least in the Lusophone world): the domestic and the emotionally intimate. Whereas other writers have focused on the more immediate problems of colonial and post-colonial Portugal, such as the war and its consequences or the effects of colonialism on the African population, Figueiredo has dared to apply her literary scalpel to the relationship between the colonialist and the anti-colonialist from the point of view of different generations of the same family. The opposition is not one of European anti-colonialists in Portugal and colonialists in Africa. It is of father and daughter, older versus younger generation. Man versus woman. But perhaps more importantly, it is an opposition between her own selves, between conflicting sides of her identity.

In effect, the gender dimension is again crucial to understanding the impact of this work. As has been pointed out, throughout the book there are constant references and reflections on the author's body, about her sexual desire and the experience of growing up. Colonialism is not an abstract concept after all, it happened and influenced all areas of existence, including the bodily one. It was a material process too and in the case of Figueiredo, one that is directly linked with her identity as a woman. Moreover, one can always consider the symbolism of a woman growing up in the shadow of an oppressive and violent patriarchy of which she strives to get rid of.

³⁹Koblucka, "Love Is All You Need," 46.

More than being just an individual expiation, the book is also a metaphor for the collective Lusophone post-colonial identity, for as Virginia Woolf once pointed out: “(...) the public and the private worlds are inseparably connected... (*sic*) the tyrannies and servilities of one are the tyrannies and servilities of the other.”⁴⁰

This attention to the specificity of gender when it comes to Portuguese literature has been supported by de Magalhães:

[Portuguese] women writers do not compose their narratives on specifically feminine, and still less, feminist subjects, but on societal questions in general: the life of the polis, in many of its nuances. [...] Undoubtedly, our Revolution lies at the root of this phenomenon. Yet, the writings point to central female (or feminine) issues, despite the variety of topics they handle. This seems to be a new feature in the last few decades, in so far as it combines, in several forms, the private and the public domains of life.⁴¹

The book is then a powerful account on the formation of a complex identity, marked by the trauma of having to choose between staying in a violent colonial setting or experiencing the trauma of permanent departure from one's country.

This trauma is manifested especially not by a denial but a lack of adequate modes of articulation: “Precisava de uma identidade. De uma gramática.”⁴² (I needed an identity. A grammar.)

Her desire for a legitimate identity, a specific “grammar” that would permit her to articulate her true self, uncovers the troubled question of those caught in such a situation, unable to retell their experience clearly, often tangled up in a mixture of quite opposite emotions.

It is easy to see that the identity of the author is still a traumatic one, which cannot be resolved without collective willingness and effort. However, and as we have seen, such undefined identity does not mean a moral ambiguity in relation to the issue of colonialism. Ambiguity is a term that in Figueiredo's writing can only be applied when articulating her affective identity, not her ethical and moral compass. It is indeed quite bluntly that she announces her beliefs. Figueiredo places herself firmly on the grounds of

⁴⁰Virginia Woolf, *Three Guineas* (New York: Harcourt, Brace, Jovanovich, 1966), 147.

⁴¹de Magalhães, “Portuguese Fiction,” 191.

⁴²Figueiredo, *Caderno de Memórias Coloniais*, 103.

rejection of colonialism, unwavering: “Um branco que viveu o colonialismo será um branco que viveu o colonialismo até ao dia da morte. E toda a minha verdade é para eles uma traição. [...] Uma afronta à memória do meu pai [...]”⁴³. [“A white person who lived the colonialism will be a white person who lived the colonialism until the day of their death. And all my truth is for them a betrayal. [...] A provocation to the memory of my father [...]”].

This rejection of being on the side of the perpetrators, even if it means going against what her own father believed in and in that way, betraying her love for him, is a brave act of moral standing. It is by making this moral statement that Figueiredo is capable of bridging the split in herself, of combating the paralysis of the broken identity of that statue of guilt she had become. This, according to Judith Herman, is fundamental to correctly address trauma:

[...] when the traumatic events are of human design, those who bear witness are caught in the conflict between victim and perpetrator. It is morally impossible to remain neutral in this conflict. The bystander is forced to take sides. It is very tempting to take the side of the perpetrator. All the perpetrator asks is that the bystander do nothing. He appeals to the universal desire to see, hear and speak no evil. The victim, on the contrary, asks the bystander to share the burden of pain. The victim demands action [...].⁴⁴

The construction of a solid identity, one that overcomes a schizophrenic existence, is possible, even though indelibly marred by the dark memories of colonialism, trauma, violence and shame.

In the last chapter, the reader is graced with a more hopeful image. It is a more reflexive chapter, its focus shifting from the father, from Africa, from colonialism, once again to the daughter and her inner life. It opens with night falling, with the sense of things coming peacefully to an end. The night metaphorically falls over the earth and she is lying on the ground, taking in the myriad of bodily events; the smells, images and surrounding her, the ants and bugs touching and skin and causing her to itch. Crucially, the narrative voice shifts from the first to the second person of the singular. She is addressing herself, but a “herself” who is not yet her. She is addressing her own future, she is, at the same time, constructing it:

⁴³Figueiredo, *Caderno de Memórias Coloniais*, 131.

⁴⁴Judith Herman, *Trauma and Recovery* (New York: Basic Books, 1992), 7.

Caiu a noite sobre todas as coisas que nascem da terra, que tocam a terra [...]. Tu estás sobre a terra. Quero dizer, revolves-te nela. [...] Era isto que querias. Este cheiro. Sentas-te. Sorris. É exactamente como imaginavas. [...] Não te importa a terra no cabelo nem nas unhas. Esfregas-te. Ris. [...] Quanto tempo permanecerás sobre a cova onde o teu passado apodrece? [...] Para onde vais? Para onde vais, agora?⁴⁵

[Night has fallen over everything that are born from the earth, that touch the earth [...]. You are on the earth. I mean, you revolve on it. [...] This is what you wanted. This smell. You sit down. You smile. It is exactly how you imagined. [...] You don't care about the earth in your hair and in your nails. You rub yourself. You laugh. [...] How long will you stay over the grave where your past rots? Where are you going? Where are you going, now?]

Finally, the author returns to the earth, perhaps an attempt to reconnect to that deeper sense of self, to cover the gap that her rotten past has left and that, rather than be fixed, needs to be accepted so that she can move on.

“Where to?” she asks herself without providing an answer. Because such an answer is not possible, yet. Not for her and not for that “You” that takes over the last chapter, as a projection of a future, her future self, or the ones like her, who are asked to be a witness. A “you” that is simultaneously herself and her identity but also the collective identity she embodies. An identity in motion, in perpetual construction, not sure exactly where to go yet, but one that has found its earth again, one that moves inexorably away from that statue of guilt. It has shed the traumatic past and found its earth again. Even if that earth does not match a material reality, a concrete territory. This seems to be an unavoidable reality in post-modern Portugal. For better or for worse, identities no longer need territories. In the words of Boaventura de Sousa Santos:

Com a intensificação das interacções e das interdependências, as relações sociais desterritorializam-se na medida em que passam a cruzar fronteiras que até há pouco estavam policiadas por alfandegas, nacionalismos, línguas, ideologias e frequentemente por todos eles ao mesmo tempo. Com isto, os direitos a opções multiplicam-se indefinidamente e o estado nacional, cuja principal característica é a territorialidade, deixa de ser uma unidade privilegiada de interação e torna-se mesmo relativamente obsoleto. Mas, por outro lado, e em aparente contradição com este processo, estão a emergir novas identidades locais e regionais construídas na base de novos e velhos direitos a raízes.⁴⁶

⁴⁵Figueiredo, *Caderno de Memórias Coloniais*, 136.

[With the intensification of the interactions and interdependencies, social relations get deterritorialized as they start crossing boundaries that were, not a long time ago, policed by customs, nationalisms, languages, ideologies and frequently by all of these simultaneously. Therefore, the rights to options multiply themselves indefinitely and the national state, whose main characteristic is territoriality, stops being a privileged unit of interaction and it becomes relatively obsolete. But, on the other hand, and in apparent contradiction with this process, new local and regional identities based on new and old rights to a *root*, are emerging.]

Conclusion

Figueiredo's roots cannot be re-planted. The return to earth (African earth?) is only an imagined one, as the narrator never seems to have physically returned. The deterritorialized interaction presented by Sousa Santos cannot, therefore, for displaced identities such as the narrator's, be achieved through memory; but only through *postmemory*, through what Hirsch calls "an imaginative investment and creation", such as literature. And it is through literature, through the act of creation, that Isabela Figueiredo achieves that interaction that forges her complex identity. Her book is, simultaneously, a very powerful account of the injustices of colonialism and the damages it brings about, and an attempt to bridge the gaps in her identity by successfully articulating its different sides without the risk of collapse. It is also the reclaiming of a strongly feminine narrative voice.

Within the space of Lusophone literature of postcolonialism, Figueiredo's book is at once a continuation of the dismantling of patriarchal colonialism initiated by writers such as Lidia Jorge, and the construction of an alternative voice for narratives of displacement, which in the Portuguese context are normally permeated by a sense of nostalgia. A close feminist reading of the book would further enlighten where the author's text is successful in its dismantling of patriarchal colonialism (and in fact patriarchy is quite literal in Figueiredo's book), whether it is by the reclaiming the body as a focus of experience, or by demystifying sex and desire. However, my intention in this article was not to engage in such a reading, interesting and fruitful as it may be. Within the scope of this article, I have otherwise preferred to explore the topic of identity and postmemory, in particular the

⁴⁶Boaventura de Sousa Santos, "11/1992 (Onze teses por ocasião de mais uma descoberta de Portugal)," *Luso-Brazilian Review* (1992): 101.

complexities of how displacement contributes to the formation of the “schizophrenic” identities of displaced persons.

It is my view that this is a crucial aspect to the understanding of the topic of identity in the contemporary Lusophone world. If we consider that Portuguese colonialism has, in one form or another, touched so many countries and so many people, narratives such as Figueiredo’s must be taken to the fore, in order to give voice to the deterritorialised, but valid, “schizophrenic” identities created by the aftermath of the fall of the Portuguese colonial world.

The Use of Languages as Tool to (re)Create Social and National Identities over Three Generations in Mozambique from 1975 to Modern Times ¹

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Introduction

Language represents far more than a simple understanding of how people communicate, giving meaning to how people share and (re)construct their identities within the building of a certain nation-state. In modern times, “language has become a powerful marker of ethnicity and of national identity.”² In Mozambique, after independence in 1975, “language issues have played an important constitutive role in the development of the Mozambican nation-state.”³ Portuguese is the official language of Mozambique, being a colonial legacy and a political choice made by the national movement fighting against Portuguese colonialism, reshaped into the ruling political party after independence until nowadays (i.e., Frelimo). After independence, Portuguese language was chosen to ‘unify’ the nation instead of any other national languages. None of the national or local languages are spoken throughout the country, having no *lingua franca* recognized besides Portuguese.⁴

¹I would like to thank Robert Kenedy for comments and suggestions on the manuscript, Fernando Nunes as co-editor of this special issue, and the anonymous reviewers for their valuable comments on an earlier draft of the manuscript. The usual disclaimers apply.

²Gerard Delanty and Patrick O’Mahony, *Nationalism and Social Theory* (London: Sage, 2002), 129.

³Christopher Stroud, “Portuguese as Ideology and Politics in Mozambique: Semiotic (Re)constructions of a Postcolony,” in *Language Ideological Debates* (Berlin: Mouton de Gruyter, 1999), 343.

⁴Gregório Firmino, *A “Questão Linguística” na África Pós-Colonial: o Caso do Português e das Línguas Autóctones em Moçambique* (Maputo: Texto Editores, 2005).



In the beginning of the nation, during the socialist period, ethnicity was labeled as being part of the ‘colonial and traditional’ worlds and “Mozambican languages were ideologically dismissed as part of colonial structures of management and of patrimonial interest only.”⁵ To claim an ethnic identity was to defend a divided nation similar to colonial times. On the contrary, speaking Portuguese after independence became a ‘sign of distinction’⁶ of Mozambicans who were part of the new nation, unified through a common language. Conversely, to speak Portuguese during colonial times was also a ‘sign of distinction’, symbolizing the entrance into modernity, translated through schooling patterns. “Education allowed a few lucky ones to progress (as much as possible) in the ‘modern’ and particularly urban sector of the colonial economy; and it is here precisely that we can find the roots of the ideology of modernity.”⁷

Furthermore, the ‘persistence’ of the colonial language is also linked to practical reasons related with the language in which the schoolbooks were written, and to the (re)creation of the ‘new’ elite, who spoke Portuguese, one of the “foreign [colonial] languages, whose possession had marked the colonial elite, [and] became too precious as marks of status to be given up by the class that inherited the colonial state.”⁸

In fact, accessing Portuguese language during colonial period was a controlled process, being “one of the measures the colonial government put in place to contain ‘native’ mobility—both socially and geographically.”⁹ In-

⁵Christopher Stroud, “O Português de Moçambique na Construção de um Espaço Social e Político,” *VEREDAS*, 9 (2008): 137-154, 141 [URI:<http://hdl.handle.net/10316.2/34456>] (original in English with a Portuguese title).

⁶Pierre Bourdieu, *La Distinction, Critique Sociale du Jugement* (Paris : Les Editions de Minuit, 1979).

⁷“A educação permitia a uns poucos afortunados progredir (tanto quanto possível) no sector “moderno” e predominantemente urbano da economia colonial, e é precisamente aqui que podem ser encontradas as raízes da ideologia de modernidade,” in Jason Sumich, “Construir uma Nação: Ideologias de Modernidade da Elite Moçambicana,” *Análise Social*, XLIII, 2.º (2008): 319-345, 334.

⁸Kwame Anthony Appiah, *In my Father’s House – Africa in the Philosophy of Culture* (New York: Oxford University Press, 1992), 4.

⁹Christopher Stroud, *O Português de Moçambique*, 139. For information regarding the colonial education system see Eugénio Lisboa, *O Ensino em Moçambique* (Arquivo Histórico de Moçambique: Maputo, n/d); Eugénio Lisboa, “Education in Angola and Mozambique” (in Rose, B., ed, *Education in Southern Africa*. London: Collier-MacMillan, 1970): 264-321.

deed, the effects of geographical control of Portuguese language during colonial times still impact on modern Mozambique through the school network around the country. Equally important are factors such as the Civil War (1976-1992)¹⁰ and the development index of the country that continues to contribute for the reproduction of social inequalities in accessing school and learning the official language of the country. Indeed,

the war led to the destruction or closure of 58 per cent of schools. This affected those regions most which had lagged behind historically in terms of education. Almost 82 per cent of all schools in the Central Region were destroyed or closed between 1983 and 1992 (...) In contrast, in Maputo City no schools were destroyed or closed.¹¹

With the 2000 and 2001 floods and cyclones, namely in Zambezia and Nampula provinces, having the largest population in the country, “some of those schools were destroyed again.”¹²

These patterns of inequality contributed to the consolidation of an urban educated socio-economic elite,¹³ located in the capital city, Maputo, in a country in which 87.3% of the population live in rural areas with 62.6% living in severe poverty.¹⁴

¹⁰About the Civil War in Mozambique: Hans Abrahamsson and Anders Nilsson, *Mozambique: The Troubled Transition – From Socialist Construction to Free Market Capitalism* (London and New Jersey: Zed Books, 1995); Christian Geffray, *La cause des armes au Mozambique. Anthropologie d'une guerre civile* (Paris: Karthala, 1990); Elísio Macamo, “Accounting for Disaster: Memories of War in Mozambique,” *Afrika Spectrum* 41 (2) (2006): 199-219; Carolyn Nordstrom, *A Different Kind of War Story* (Philadelphia: University of Pennsylvania Press, 1997).

¹¹Servaas van der Berg, Carlos da Maia and Cobus Burger, “Educational Inequality in Mozambique,” *WIDER Working Paper* 2017/212 (2017), 1 [<https://www.wider.unu.edu/sites/default/files/Publications/Working-paper/PDF/wp2017-212.pdf>].

¹²*The Gender and Education in Mozambique - Analysis of Results, Lessons and Recommendations – Final Report*, 2001, pp. 9-10 [https://www.unicef.org/evaldatabase/files/MOZ_02_006a.pdf].

¹³Mario Mouzinho, Peter Fry, Lisbeth Levy and Arlindo Chilundo, *Higher Education in Mozambique: A Case Study* (Oxford: James Currey, 2003).

¹⁴OPHI, *Global MPI Country Briefing 2019: Mozambique (Sub-Saharan Africa)* [https://ophi.org.uk/wp-content/uploads/CB_MOZ_2019_2.pdf]; UNDP, *Inequalities in Human Development in the 21st Century – Briefing Note for Countries on the 2019 Human Development Report: Mozambique* [http://hdr.undp.org/sites/all/themes/hdr_theme/country-notes/MOZ.pdf]

Furthermore, the appropriation of the former colonial language is a “contradictory process, because it leads to the idea of a unified nation, and at the same time ends up producing social exclusion due to the linguistic diversity that characterizes Mozambique.”¹⁵

The Three Generations of Modern Mozambique and Language(s)

Drawing on findings from the study conducted in the southern region of Mozambique, Maputo, with ethnographic fieldwork done from 2011 to 2013, including collection of 18 life histories, with bibliographic and documental research done from 2011 to 2016,¹⁶ it is argued that the official language is used as a social and political tool to promote social and political (im)mobility, granting elites, made during ‘colonial times,’¹⁷ the continue privilege of accessing power.

In modern Mozambique, and according to the narratives of the three generations, the Portuguese language is an important identity marker regarding social and political dominant positions in the Mozambican society. Identity is understood as “never unified and, in late modern times, increasingly fragmented and fractured; never singular but multiply constructed across different, often intersecting and antagonistic, discourses, practices and positions.”¹⁸ This approach to how language is used and incorporated in one’s identity is described by three generations of Mozambican students over three ideological and political periods after 1975 until recently. The descriptions are constructed around the idea of a ‘public self’ symbolized by each president of Mozambique, as following:

¹⁵“(…) um processo contraditório, por conduzir à projecção de uma nação-estado unificada, ao mesmo tempo que acaba tendo efeitos de exclusão social, face às características da diversidade linguística prevalente em Moçambique,” in Gregório Firmino, *A Situação do Português no Contexto Multilíngue de Moçambique* (n.d.), 1 [http://dlcv.fflch.usp.br/sites/dlcv.fflch.usp.br/files/06_19.pdf].

¹⁶Xénia de Carvalho, *The Construction of Knowledge in Post-colonial Societies: Identity and Education over Three Generations in Mozambique* (Brighton: University of Brighton, 2016) [URL: The construction of knowledge in postcolonial societies: identity and education over three generations in Mozambique — The University of Brighton].

¹⁷Sumich, *Construir uma Nação*.

¹⁸Stuart Hall, “Introduction: Who Needs ‘Identity?’” in Stuart Hall and Paul du Gay, eds., *Questions of Cultural Identity* (London: SAGE, 2011), 4.

Table 1 Description of the Three Generations¹⁹

	<p>The 1st generation is symbolized by the 1st President of Mozambique, Samora Machel (1975-1986), being composed by people from the period of the Armed Struggle for National Liberation (1964-1975), their families and exiled people by the colonial regime; also by the so-called ‘8th March Generation’ of 1977 and students sent abroad by the regime to study in foreign countries (e.g., Cuba, former GDR, former USSR, Hungary, Brazil). The identification is towards Marxism-Leninism/Socialism as an ideology.</p>
	<p>The 2nd Generation is symbolized by the 2nd President of Mozambique, Joaquim Chissano (1986-2005), simultaneously representing the period of highest intensity of the Civil War (1976-1992) and the end of war with the Rome General Peace Agreement in 1992, the introduction of political multi-party system and the idea of democracy. In this generation, there are younger faculty members teaching college students. The identification is based on Democracy as an ideology.</p>
	<p>The 3rd Generation is symbolized by the former President, Armando Guebuza (2005-2014), representing the introduction of the neo-liberal economy. This is the time of the young college students, the present time, where we find the globalized and technological youth like in other parts of the world. The identification is towards Neo-Liberalism as an ideology, looking for a job that provides them the future “com tako” (in slang Portuguese, meaning “with dough”). This is the so-called “waithood generation.”²⁰</p>

An example of what one participant told me can illustrate the way narratives are organized when telling the story, having an identification that grants a sense of shared identity calling for each president of the country: “Aquele jovem ali – vês? – chegou num carro grande! Essa geração é o espe-

¹⁹Source: Carvalho, *The Construction of Knowledge*.

²⁰According to Alcinda Honwana (2013, 2014), ‘youth in waithood’ live in uncertain times; it is difficult to predict what will be the outcome of youth social movements against neoliberal ideology. See: Alcinda Honwana, “‘Waithood’: Youth Transitions and Social Change,” in *Development and Equity: An Interdisciplinary Exploration by Tén Scholars from Africa, Asia and Latin America* (Leiden: Brill, 2014), 28-40; Alcinda Honwana, *O Tempo da juventude: Emprego, política e mudanças sociais em África* (Maputo: Kapicua Livros e Multimédia, 2013).

lho da política de Guebuza: teu valor é o que mostras aos outros! Não era assim no tempo de Samora!” (“That young man over there – can you see it? – he just arrived in a big car! This generation is the mirror of Guebuza’ politics: your value is what you show to others! It was not like this during Samora’s time!”).²¹ But, in the same narrative, I find the other side of the story, when he told me that during Samora’s times there already was a social distinction, not measured by ‘good cars,’ but by political filiation:

O nosso regime funcionou [no período de Samora Machel] muito numa tentativa de tentar criar uma elite pré-fabricada ao seu jeito, estás a ver? Quer dizer, que as pessoas que não pertencem aqui [a este grupo, à Frelimo], por muito que eles se esforcem, nunca vão entrar ...

Our regime worked [during Samora Machel period] very much in an attempt to create a prefabricated elite, in its own way, you see? Meaning that people who don’t belong here [to this group, to Frelimo], no matter how hard they try, they will never be in ...²²

The notion of generation is understood as a space and time of identity and political construction, in which biography and history meet, being “the process of identity formation and the process of social reproduction (...) one and the same.”²³ In each generation there is the possibility for social change, sharing historical and social experiences – ‘politically relevant experiences,’²⁴ resulting in the (re)construction of fragmented and multiple identities by each participant within each generation.

Concerning data about languages in Mozambique, although the number of Portuguese speakers has increased since 1975, Portuguese is still an urban language spoken mainly by people who attend school and live in the capital city of Maputo.²⁵ When comparing data about Portuguese speakers in the country, in 2007, the population that spoke Portuguese increased from 9%

²¹Transcript of Life History, Male Participant, 1st Generation/Socialism.

²²Transcript of Life History, Male Participant, 1st Generation/Socialism.

²³Philip Abrams, *Historical Sociology* (New York: Cornell University Press, 1982), 262.

²⁴Abrams, *Historical Sociology*, 258.

²⁵Firmino, A “*Questão Linguística*”; Lourenço Cossa, “Línguas Nacionais no Sistema Nacional de Educação para o Desenvolvimento em Moçambique,” *Educ. Real.*, Porto Alegre, 36 (3) (2011): 705-725. Regarding linguistic diversity and Portuguese language uses see, for example, Alexandre António Timbane, “A Justiça Moçambicana e as Questões de Interpretação Forense,” *Language and Law / Linguagem e Direito*, 3 (2), 2016: 78-97.

in 1997 to almost 51% in 2007, but as native language only 10% referred it as their native language. According to the Census of 2007, around 81% of the urban population said that they speak Portuguese, compared to almost 36% in rural areas of the country.

Regarding national languages, there are 23 national languages in the country representing the mother-tongue of most of the population.²⁶ The national language more representative in Mozambique, in 2007, was Emakhuwa (26.3%), a Bantu language spoken by the Makua ethnic group in the north of the country, particularly in the Nampula province; followed by Xichangana (11.4%), also called Tsonga or Xitsonga or Shangaan, a language spoken in the south of the country, with Zulu/South African influences.²⁷

However, recent data from the Census of 2017, put Portuguese language as the second native language in Mozambique, particularly in urban areas, but representing a low number of speakers (i.e., 3.686.890 out of 22.243.373 of the total population); being Xichangana the third native language, in rural areas (with 1.013.223 out of 14.568.549 total population). Emakhuwa continues to be the first native language, with the highest number of speakers in rural areas (the total number of speakers is 5.813.083 out of 22.243.373 of the total population).²⁸

In terms of description of the national languages, there are eight linguistic groups in the country, with sub-divisions into several local Bantu languages, within the four geographic zones:²⁹

- Swahili (Zone G);
- Yao and Makua (Zone P);
- Nyanja and Senga-Sena (Zone N); and
- Shona, Tswa-Ronga and Chopi (Zone S).

²⁶Firmino, A “*Questão Linguística*”; Firmino, *A Situação do Português*.

²⁷Firmino, A “*Questão Linguística*”; Firmino, *A Situação do Português*. Zulu is the largest South African ethnic group with historical roots in Mozambique.

²⁸INE, IV RGPH 2017, *Moçambique, 08 – Língua (2017) – “Quadro 22. População de 5 anos e mais por Idade, segundo Área de Residência, Sexo e Língua Materna”*: [<http://www.ine.gov.mz/iv-rgph-2017/mocambique/08-lingua>].

²⁹According to the classification of Malcolm Guthrie (1967/71), quoted by Firmino, A “*Questão Linguística*”: 47-48.

These zones are part of the sixteen Bantu zones conventionally used to divide languages spoken by the Bantu peoples in Sub-Saharan Africa. The table below describes the eight linguistic groups of Mozambique and regions (provinces and districts of Mozambique, and neighbouring countries) in which they are spoken:

Table 2 Linguistic Groups of Mozambique and Sub-divisions³⁰

<i>Linguistic group</i>	<i>Languages</i>	<i>Provinces/districts in which the languages are spoken/mother-tongue (MT)</i>
Swahili	Kimwani	Cabo Delgado (Mocimboa da Praia, Macomia, Quissanga, Ibo, including the Islands of the Quirimbas Archipelago; Pemba and Palma)
Yao	Yao/Ciyaawo	Niassa and Cabo Delgado, being Niassa the 'homeland'. Other countries: Malawi, Tanzania, some regions of Zambia and Zimbabwe.
	Maconde/Shimakonde/Makonde	It is spoken almost in all the country, but as MT it is mainly in 7 districts of Cabo Delgado (Macomia, Meluco, Mocimboa da Praia, Mueda, Muidumbe, Nangade and Palma). Other countries: Tanzania
	Mabiha (Mavia)	~
Makua	Macua/Emakhuwa/Makua	Nampula, Cabo Delgado, Niassa and Zambezia
	Lomwe/Elomwe (variant of Emakhuwa)	Nampula (Malema, partly in the districts of part Ribáwè, Murrupula and Moma), Zambezia (Gurue, Gilé, Alto Molócue e Ile)
	Ngulu (W. Makua)	–
	Chuabo/Echuwabu/Cuabo	Zambezia (Maganja da Costa,

³⁰The table was done with data from the following authors, still a working-in-progress research, to distinguish between the languages and the sub-languages: Armindo Ngunga and Osvaldo G. Faquir, *Padronização da Ortografia de Línguas Moçambicanas: Relatório do III Seminário* (Centro de Estudos Africanos, CEA – Universidade Eduardo Mondlane, UEM: Maputo, 2012), 17-259; Firmino, *A “Questão Linguística*.

	(Cuambo)	Quelimane, Namacurra, Mocuba, Mopeia, Morrumbala, Lugela, Inhassunge, Mugogoda and Milange) and Sofala (Beira)
Nyanja	Nyanja/Cinyanja	Niassa (Mecanhelas, Mandimba and Lago), Zambezia (district of Milange) and Tete (Angónia, Furancungo, Macanga, Zumbo, Tsangano and parts of Fingoé, Cazula and Moatize). Other countries: Malawi and Zambia
	Cewa	–
	Mananja	–
Senga-Sena	Nsenga	–
	Kunda	–
	Nyungwe/Cinyungwe	Tete (Moatize, Changara, Cahora Bassa and parts of Maravia). Other countries: Malawi, Zimbabwe and Zambia
	Sena/Cisena	Beira City and 22 districts of 4 provinces: Manica (Gondola, Guru, Macosa and Tambara), Sofala (Beira City and districts of Caia, Chemba, Cheringoma, Dondo, Gorongoza, Maringue, Marromeu, Muanza, Nhamatanda), Tete (Changara, Moatize and Mutarara) and Zambezia (Chinde, Inhassunge, Mocuba, Mopeia and Morrumbala, Nicoadala). Other countries: Malawi and Zimbabwe
	Cilbalke/Ruwe/Rue	Manica and the entire district of Bárue, except Sierra Chôa locality
	Podzo	–
Shona	Korekore	–
	Zezuru	Other countries: Zimbabwe
	Manyika/Cimanyika	Border region of the province of Manica with the Republic of Zimbabwe (Mossurize, Manica, Barwe and Sussundenga). Other

		countries: east Zimbabwe
	Têbe/Ciutee/Ciwute	Province of Manica, Chimoio City and surroundings of Chimoio
	Ndau/Cindau	Sofala, Manica and the northern part of Inhambane. Other countries: Zimbabwe
Tswa-Ronga	Tsonga: 3 languages <ul style="list-style-type: none"> • Xirhonga/Ronga, • Xichangana • Citshwa/Tswa 	The three languages are 'intelligible', spoken in the provinces of Maputo, Gaza and Inhambane, and in the southern part of the provinces of Manica and Sofala. Other countries: southern of Zimbabwe; northeastern of South Africa/former Province of Transvaal (Note: Xironga is spoken mainly in the Province of Maputo and the capital city of Maputo)
	Gwamba	–
Chopi	Chope/Cicopi/Copi (Lenge)	Inhambane (Zavala, Inharrime, Homoine) and Gaza (Manjacaze, Chidenguele, Chongoene)
	Bitonga/Gitonga/Tonga (Shengwe)	Inhambane (regions surrounding Inhambane Bay, cities of Inhambane and Maxixe; districts of Jangamo, Morrumbene and Homoine); speakers in all country, including the capital city, Maputo

Methodology

The methodological approach used in this study is grounded in the epistemological position of Bruner's theory of 'narrative construction of reality.' He notes that "it is through our own narratives that we principally construct a version of ourselves in the world, and it is through its narrative that a culture provides models of identity and agency to its members."³¹ Within a narrative it is possible to unfold the unexpected, opposed or silenced meanings,

³¹Jerome Bruner, *The Culture of Education* (Cambridge: Harvard University Press, 1996), xiv.

understanding “more about individual and social change,”³² incorporating notions such as the hidden and public transcripts as forms of resistance in everyday life practices.³³

The public transcript is an onstage practice, in which people share the public and socially acceptable visions about social reality made by the ruling social classes in the country: “the ideas of the ruling class are in every epoch the ruling ideas.”³⁴ Within the (re)production of the public transcripts, as a self-portrait of the dominant elite, hidden transcripts are (re)products as well: “The practice of domination, then, creates the hidden transcript. If the domination is particularly severe, it is likely to produce a hidden transcript of corresponding richness.”³⁵ The hidden transcript is an offstage practice, a counter-narrative about ideas and practices shared by the participants side by side with the dominant ideas and practices of society.

Methods. To explore the public and hidden transcripts, I combined ethnographic and narrative approaches, having life history as the main research method. Ethnography allowed for a deeper understanding of the hidden meanings of languages within context, as well as having a “thick description” of narratives of everyday life interactions.³⁶ When asking, we are ‘inscribing’

³²Molly Andrews, Corinne Squire and Maria Tamboukou, eds., *Doing Narrative Research* (Los Angeles: SAGE, 2008), 1-2.

³³James Scott, *Domination and the Arts of Resistance: Hidden Transcripts* (New Haven: Yale University Press, 1990); James Scott, *Weapons of the Weak: Everyday Forms of Peasant Resistance* (New Haven: Yale University Press, 1985).

³⁴Scott, *Weapons of the Weak*, 315.

³⁵Scott, *Weapons of the Weak*, 315.

³⁶Molly Andrews, Corinne Squire and Maria Tamboukou, *Doing Narrative Research*; J. Borneman and A. Hammoudi, eds., *Being There: The Fieldwork Encounter and the Making of Truth* (Berkeley: University of California Press, 2009); J. Clifford, and G. Marcus, G., eds., *Writing Cultures: The Poetics and Politics of Ethnography* (Berkeley: University of California Press, 1986); Clifford Geertz, *The Interpretation of Cultures* (New York: Basic Books, 1973); Clifford Geertz, *Works and Lives: The Anthropologist as Author* (California: Stanford University Press, 1988); I. Goodson, A. Loveless and D. Stephens, eds., *Explorations in Narrative Research* (Rotterdam: Sense Publishers, 2012); Marianne Horsdal, *Telling Lives – Exploring Dimensions of Narratives* (London: Routledge, 2012); Paul Ricoeur, *Time and Narrative* (Chicago: Chicago University Press, 1984); G. Spindler and L. Spindler, *Interpretative Ethnography of Education – at Home and Abroad* (London: LEA, 1987); Kathleen Wilcox, “Ethnography as a Methodology and Its Application to the Study of Schooling: a Review,” in *Doing the Ethnography of Schooling: Educational Anthropology in Action* (New York: CBS College Publishing, 1982).

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You know that language is a tool ... I think since the beginning I have learned to speak xiTsaw and things that are typically ours ... I have learned through language ... At the same time, they taught us Portuguese ... to read ... even before going to school, I have learned how to speak Portuguese with my brothers and Changana ... Tswa, I have learned with my mother ... I had friends outside home that spoke Changana. So, all those languages, I have learned naturally, almost all at once ... In school ... it was mandatory to speak Portuguese.¹⁰⁷

Similarly, another male participant, from the central region of Mozambique (Sofala province), describes Portuguese as the mandatory language in school, “só falávamos português na escola. Em casa continuávamos a falar em Ndau” (“we only spoke Portuguese at school. At home we spoke in Ndau”¹⁰⁸). As he remembers, in school it was normal for someone saying “professora, está a falar uma nativa e vinha alguém e dava-te um carolo por causa disso” (“teacher, [he] is speaking a native [language] and they were punished because of that”). He adds that “os sotaques estão muito presentes, porque a língua está lá presente ... A questão da língua está lá, é efectivamente um choque e a gente vai-se adaptando, aceitando” (“accents are very much present, because [our local] language is there ... The issue of language is there, it is really upsetting, but we adapt, gradually we accept.”).

Another male participant from the same generation (2nd generation/democracy), from the southern part of the country (Inhambane province), also described the languages he uses, such as Xitswa, Bitonga, Chope, Changana and Ronga, mentioning that “[n]a zona dos meus pais, falava-se o Bitonga” (“[in] the region of my parents, we spoke Bitonga.”¹⁰⁹). He underlines that in school Portuguese was the language used by everyone. He explains the way he grew up, in between languages,

Então era proibido dentro da sala de aulas e no recinto escolar falar-se a língua local. Então nós comunicávamos em português e comunicávamos em língua local, em Bitonga quando fosse para fazer troça dos amigos, gozar ... Usávamos a língua local como se fosse falar em voz baixinha. ... Oficialmente, não, mas em casa eu falei muito a minha língua, porque os meus avós existiam, paternos como maternos, e meus tios ... e esse pessoal fazia questão que nós falássemos a

¹⁰⁷As mentioned, same transcript footnote 104.

¹⁰⁸Transcript of Life History, Male Participant, 2nd Generation/Democracy (different from the above).

¹⁰⁹Transcript of Life History, Male Participant, 2nd Generation/Democracy (different from transcript footnote 107 and 103).

língua Bitonga no caso. E também o facto de nos fins-de-semana irmos passar ao campo não tínhamos como ... No campo nós falávamos muito a língua Bitonga no caso.

Inside the classroom and in the school grounds it was forbidden to speak the local language. So, we communicate in Portuguese and communicate in local language, in Bitonga, when we wanted to make fun of our friends ... We used local language speaking softly, almost with no noise ... Officially, no [didn't speak local languages], but at home I spoke my language a lot, because I had my grandparents, both from my father and my mother sides, and my uncles ... And they made sure we spoke Bitonga. And on weekends, we went to the countryside ... In the countryside we spoke Bitonga.

Growing up in between languages, the official and the national languages of each group, has issues when thinking about which language should be the one taught at school. The same male participant adds that,

Agora algumas pessoas estão a adoptar o ensino bilingue aqui. O problema é que numa zona como Maputo tu tens pessoas de todos os cantos de Moçambique. Então qual é a língua local que tu vais adoptar? É um problema ... Porque nós estamos a atingir agora uma geração que não fala bem português mesmo sendo o português a primeira língua e não sabe nada da língua local ... de tu teres uma geração que não vão saber falar nem bem português, nem a língua local, mas são moçambicanos ...

Now people are adopting bilingual education here. The problem is that in an area such as Maputo, you have people from all parts of Mozambique. So, which local language are you going to adopt? It is a problem ... We are reaching a generation that do not speak Portuguese well, even when Portuguese is their first language, and don't know local languages ... you are going to have a generation that won't be able to speak Portuguese or the local language, but they are Mozambicans ...

In the female participants' narratives, women are clearly described as the ones who are responsible for protecting the family by not allowing their children to speak national languages and teaching them Portuguese. As one female participant described,

A minha bisavó, a avó da minha mãe, era Sena, ela nasceu no Vale do Zambeze ... A minha avó já falava Chuabo, mas para dar melhores chances às filhas falou sempre com elas em Português. Na casa do meu pai, os homens falavam Português e as mulheres falavam o Sena. Então o meu pai fala Sena com a mãe e falava Português com o pai, portanto ele é bilingue ... Eles estudaram em Portu-

guês, então a língua de casa era o português ... enquanto que a língua sentimental, no meu pai muito mais, que é Sena ... Eles falam [línguas nacionais], não têm problemas em falar, mas porque eu acho, a maneira como o interpreto é que sendo o homem a falar não prejudica o avanço, mas ser mulher e falar prejudicaria ... o homem tinha mais maneiras de avançar sabendo e podia ir aprendendo, agora as mulheres elas percebem mais ou menos e então não transmitiram ... A minha língua materna é o Português ... Mas considero que as minhas línguas de origem são o Sena e o Chuabo ... Tem a ver com a minha origem ... O Chuabo é uma espécie de crioulo e o Sena também. O povo Sena é a confluência de vários povos: os Nguni, os portugueses, e os indianos, os chineses, os alemães ...

My great grandmother, the grandmother of my mother, she was Sena, she was born in the Zambezi Valley ... My grandmother already spoke Chuabo, but in order to give her daughters better chances, she always spoke in Portuguese with them. In my father's house, men spoke Portuguese and women spoke Sena. So, my father speaks Sena with her mother and Portuguese, so he is bilingual ... They studied in Portuguese, so the house' language was Portuguese ... But the sentimental language, with my father much more, it is Sena ... Men, they speak [national languages], they don't have problems in speaking [national languages], but I think, my interpretation is that being the man speaking it does not hinder progress, but being a woman and speaking [national languages] would hinder [progress] ... Man had advantages knowing [national languages] and could learn [Portuguese]; now, women, they know [national languages] and they didn't spread [their knowledge of national languages] ... My mother-tongue is Portuguese ... But I consider that my native languages are Sena and Chuabo ... It has to do with my origin... Chuabo is a kind of crioulo and Sena also. The Sena people are the confluence of several peoples: the Nguni, the Portuguese, the Indians, the Chinese, the Germans ...¹¹⁰

Indeed, women are described as responsible for family memory maintenance, being ostracized with the socialist regime due to the implementation of gender equality policies. The same participant continues her story, telling about Zambezia and the impact of socialism on women:

A Zambézia é muito feito pelas mulheres ... e isso é reconhecido mesmo pelos homens ... O socialismo moçambicano, ou o Samorismo, era um bocado castro para as mulheres, foi muito mau para a Zambézia ... O poder da mulher foi muito [baixado] sim, porque foi equiparado, aquela maneira de estar foi equiparada a uma espécie de imperialismo, porque é muito hierárquico ... aquele tipo de mulher não foi muito bem visto ... as mulheres demasiado indepen-

¹¹⁰ Transcript of Life History, Female Participant, 2nd Generation/Democracy.

dentes ... as divorciadas, as sozinhas, não, isso não era muito bem visto pelo socialismo ... E se calhar para o sul, um pouco patriarcal, até foi libertador, mas ali não.

Zambezia is very much done by women ... and that is recognized even by the men... the Mozambican socialism, or 'Samorismo' [allusion to Samora Machel], was a little bit castrating for women, very bad for Zambezia ... Women's power was diminished, because it matched a kind of imperialism, very hierarchical ... those kind of woman [from Zambezia] was not very well accepted ... women are too much independent ... divorced, alone, that is not well accepted by the socialism ... Maybe, in the South, a little patriarchal, it was liberating, but not there.

Another female participant from Nampula province, in the northern region of Mozambique, told us that although she and her family migrate to Maputo in the 80s, in her family house they keep Macua traditions and language. However, Portuguese is the language they use at home with their daughters, teaching simultaneously, the women's role within their group,

Percebo muito [Macua], os meus pais nunca falaram connosco assim, tipo em Macua. Eles sempre falaram connosco em português, porque quer os meus vizinhos, quer na escola, tu tinhas sempre de falar em português ... o facto de eu ser muçulmana tem a ver com o facto de eu ser Macua ... por causa da própria cultura, a alimentação ... hábito em si ... Porque os meus pais são Macua ... nós estamos cá, em Maputo, mas é como se estivéssemos em Nampula ... Nós nos diferenciamos dos Machanganas ... O ser Macua, eu tiro a X [diz o seu nome] e ponho a mulher Macua, muçulmana ... Eu tenho duas caras ... Esta [a Macua] é aquela submissa ... tu precisas ser para seres reconhecida pelo teu grupo ... As mulheres têm uma educação diferente dos rapazes ... Eu no fundo, no fundo, sou mulher africana também, sou mulher africana, tenho um pouco daquilo que é a cultura africana. Sei qual é o meu papel como mulher ... Os homens têm muito poder, porque é muito matrilinear ... Aquelas do litoral, apesar de serem submissas, essas do litoral é que são mais submissas ... agora aquelas Macuas não! Aquelas do centro não! Não há submissão! ... No norte já encontras uma mulher com dois maridos e os dois na mesma casa e não há confusão e ela é líder.

I understand a lot [of Macua], my parents never spoke with us Macua. They always spoke to us in Portuguese, because of our neighbors; in school, you had to speak always in Portuguese ... The fact that I am Muslim because I am Macua ... My culture, the food ... the habits ... Because my parents are both Macua ... We are in Maputo, but it is like we are in Nampula ... We are different from Machanganas [southern region] ... To be Macua, I take out me [say her name] and

put the Macua woman, Muslim ... I have two faces ... This one [the Macua] is obedient ... you need to be recognized by your group ... Women have a different education from boys ... Deep down, I am an African woman, I have a little bit of what is the African culture. I know what my role as woman is ... Men have a lot of power, because it is very much a matrilineal system ... Those women from the coast, they are more obedient ... but those Macuas from the Center, no! There is no obedience! ... In the north you find a woman with two husbands and both living in the same house with no problem, she is the leader.¹¹¹

For the 3rd generation (neoliberalism), Portuguese language is the native language they claim publicly, but simultaneously there are descriptions that in order to have social interaction within society one must know local languages. The women continue to be the ones protecting family, not allowing the use of other languages besides Portuguese, and men teach their sons how to speak the national or local languages. As one male participant from the southern region of the country (Maputo province), described,

Eu cresci a falar português ... Os meus pais, a minha mãe principalmente era educadora! Dizia: “Essa coisa de changana aqui, não funciona agora. Entra nesta linha do português, vocês devem aprender português, português!”. Só que o meu pai era de uma outra vertente. Ele dizia: “você não sabe falar Changana? Imaginemos um dia que você for trabalhar para o mato, lá, encontrar aquelas senhoras que não sabem falar Português, como é que tu vais lidar com a situação?”. E o meu pai, o que fazia? Atirava-nos, por exemplo, para alguns vizinhos, eu tenho alguns vizinhos que, epa!, para brincar com eles é preciso falar Changana ... Se você não falar Changana, “é branco aquele gajo ali!” ... E então já estamos a olhar para *status* ... O meu pai atirava-me para a minha avó porque eu tinha de aprender algumas coisas, não só do Changana como língua, mas algumas coisas que têm a ver com tradição, família ... Ele dizia: “não existem outras pessoas, então você deve aprender; então você vai passar o legado às outras pessoas” ... O que eu fui aprendendo nesse transporte de legado é a questão de lidar com certos aspectos ... tu não podes-te bastar ao modernismo, tudo não pode bastar-se.

I grew up speaking Portuguese ... My parents, especially my mother, she was an educator! She always said: “That thing of speaking Changana [national language, south] here, it doesn’t work now. Go and speak Portuguese, you all must learn Portuguese”. But my father thought differently. He told me: “You don’t speak Changana? Imagine that one day you are going to work in the countryside, you are going to find that ladies who don’t speak Portuguese. How are you going to solve the situation?” My father used to send us to play with our

¹¹¹Transcript of Life History, Female Participant, 2nd Generation/Democracy (different from footnote 108).

neighbours. Epa! To play with them you need to know how to speak Changana. If you don't speak Changana they say, "that guy over there is white!" ... And now we are looking to the social status ... My father used to send me to my grandmother so I could learn things, not only Changana as a language, but also things that have to do with traditions, family ... He said: "There are no other people, so you must learn, so you can transmit the legacy to other people" ... What I learn is that to be modern is not enough.¹¹²

But when asked about his mother-tongue, the answer was "Portuguese," adding that the use of languages depends on the context,

Há uma espécie de mistura de coisas. Às vezes vem um calão, às vezes vem Português, às vezes vem até o Changana ... Depende com quem eu estou ali a interagir ... Estou a interagir com amigo [diz palavras em calão em Inglês] ... Sou moderno ... [fala em Português] ... agora quando estou com a minha avó a conversar, ela diz-me uma coisa que eu não estou de acordo, também tem a ver com a figura que ocupa em casa, então eu digo [em Changana] ...

There is a kind of mixed things. Sometimes I speak slang, sometimes Portuguese, sometimes Changana ... It depends on whom I am interacting with ... I am interacting with a friend [speak slang English] ... I am modern ... [speak Portuguese] ... but when I speak with my grandmother and she tells me something I disagree, it has also to do with the role she occupies in the house, so I say to her [speak Changana] ...¹¹³

Another participant from the 3rd generation, from the southern region as well (Maputo province), told us that Portuguese is also her mother-tongue, a language that she learned with her mother,

ela fala as três [Ronga, Changana e Xitswa] e o Português e um bocado de Macua porque ela viveu um bocado em X ... mas ela não tinha o hábito de conosco falar essas línguas, era só o Português ... Eu aprendi um bocado do Ronga mesmo por curiosidade com a empregada ...

she [mother] speaks all three languages [Ronga, Changana and xTswa] and Portuguese and a little bit of Macua [Nampula province, north region], because she lived a little bit there ... but she didn't have the habit of speaking those languages with us, it was only Portuguese ... I have learned a little bit of Ronga, out of curiosity, with the house maid ...¹¹⁴

¹¹²Transcript of Life History, Male Participant, 3rd Generation/Neoliberalism.

¹¹³Same transcript footnote 110 (above).

¹¹⁴Transcript of Life History, Female Participant, 3rd Generation/Neoliberalism.

To speak Portuguese is to be identified with modernity and the construction of the nation state, and simultaneously with the dominant race stereotypes, such as the ones incorporated during the colonial period. Indeed, in modern Mozambique, speaking Portuguese is still a strategy of social acceptability, a legacy from the colonial period, and a mark of modernity, development and globalization.¹¹⁵ As mentioned before by one of the male participants of the 3rd generation (neoliberalism), from Maputo province, not being able to speak with your neighbour's national languages is to be "white"; but not being able to speak Portuguese in the 'big city' is to "speak dog language". Or as another female participant from the 2nd generation (democracy), from Nampula province, explains,

Eu era a única africana na minha turma [no estrangeiro]. O africano era um bicho, ainda era um bicho ... Se tu não és forte, tu não aguentas ... Existe uma discriminação, ninguém quer estar perto de ti, ninguém quer partilhar as coisas contigo ... Mas a minha identidade ... a minha maneira de ser ... muito do que eu sou hoje ... tem a ver como a forma como lidei com a situação ... foi um trauma mesmo ... tu teres que no meio de muitos dizer "eu estou aqui," "eu também sou pessoa" ... A minha família muito ligada à religião ... o facto de teres Deus no coração ... talvez fez-me suportar aquilo tudo.

I was the only African in my class [abroad]. The African was still seen as an animal ... If you are not strong, you cannot deal with that ... There is discrimination, no one wants to be near you, no one wants to share things with you ... But my identity ... my way of being ... much of what I am today ... has to do with the way I deal with that situation ... It was a very traumatic situation ... you want to say "I am here," "I am also a person" ... My family is very religious ... so having God in my heart ... maybe it was that that made me bear all that in the end.

¹¹⁵For an understanding of race debates, see the classical works of Franz Fanon: Franz Fanon, *Black Skin, White Masks* (England: Pluto Press, 2008[1952]); Franz Fanon, *The Wretched of the Earth* (London: Penguin Books, 1967 [1961]). And Antonádia Borges, Ana Carolina Costa, Gustavo Belisário Couto, Michelle Cirne, Natascha de Abreu e Lima, Talita Viana & Stella Z. Paterniani, "Pós-Antropologia: as Críticas de Archie Mafeje ao Conceito de Alteridade e sua Proposta de uma Ontologia Combativa," *Revista Sociedade e Estado* 30 (2) (2015): 347-369; Archie Mafeje, "The Ideology of 'Tribalism'," *The Journal of Modern African Studies* 9 (2) (1971): 253-261; Archie Mafeje, "Africanity: a Combative Ontology," *CODESRIA Bulletin* 1 (2000): 66-71; Paula Meneses, "Images Outside the Mirror? Mozambique and Portugal in World History," *Human Architecture: Journal of the Sociology of Self-Knowledge*, 9, Special Issue (2011): 121-137; Jan Nederveen Pieterse, *White on Black: Images of Africa and Blacks in Western Popular Culture* (New Haven: Yale University Press, 1992).

When thinking about the construction process of the nation-state, the role of language(s) and in how people understand it, a male participant from the same generation, in the southern part of the country (Inhambane province), underlined that,

Porque eu penso que nós tivemos uma construção de moçambicanidade interrompida, porque é um processo que começou depois da independência, mas foi durante um período muito curto e porque havia uma necessidade de romper com o colonialismo ... Então isso chega a uma altura em que se interrompe, até porque depois tens um processo de guerra ... é uma guerra entre nós ... Quando nós entramos num processo de multipartidarismo há uma necessidade de ... continuar com o processo de construção de moçambicanidade ... eu acho que há elementos comuns ... a língua já não pode ser, poder ser, porque é a língua oficial e a que se ensina nas escolas ... a língua portuguesa é uma língua que ainda é conotada com uma língua colonial ... A língua não pode ser, é muito difícil ser uma língua de unidade nacional porque há muitas pessoas que vão ser excluídas ... A língua portuguesa não é a primeira língua de muitos moçambicanos e tu notas isso quando tu saís da cidade de Maputo, a 100 quilómetros daqui tu falas português e as pessoas ficam a olhar para ti, e são comunidades, comunidades e comunidades ... e algumas pessoas que dizem: “mas tu estás a falar Português, tu és branco para tu falares Português? Fala lá uma língua para a malta se entender!”

I think we had an interrupted construction of Mozambicanity, because it is a process that began with independence, but it was for a short period of time, and because we had the need to cut off colonialism ... There is a time that it was interrupted, because afterwards you have a war going on [Civil War] ... a war amongst us ... When we entered in the multiparty process [with democracy], there is the need to ... continue with the process of constructing Mozambicanity ... We have common elements ... Language cannot be, because it is the official language and the one taught in schools ... the Portuguese language is still a language related with a colonial language ... it will be very difficult to be one language, to develop national unity, because a lot of people will be excluded ... Portuguese language is not the first language of many Mozambicans and you realize that when you leave Maputo city. Less than a mile from here, you speak Portuguese and people just look at you, in the communities ... And some people say: “but you are speaking Portuguese, are you white to speak Portuguese?! Speak a language that we can understand!”¹¹⁶

¹¹⁶ Transcript of Life History, Male Participant, 2nd Generation/Democracy.

Limitations

The ethnographic fieldwork conducted clarified the need to more thoroughly explore the links between national identity and languages and understanding the politics of gender in the process. The study could be improved by collecting data of people without schooling to understand the (re)use of local languages, gender strategies and the location of Portuguese in the national identity construction process.

The Mozambican landscape is also broader than the formal borders of the country, with people living in neighbouring countries that are part of the participants' families that I interviewed. The colonial legacy regarding physical borders needs to be considered and fieldwork could be completed within the same family over at least three generations and/or group to understand the impact of using Portuguese and national languages in the construction of national identity.¹¹⁷

Political issues are central for an understanding of the languages landscape in Mozambique, underscoring that Portuguese is claimed as a sign of distinction and associated with the dominant political party, Frelimo, in southern region, and in urban locations. The following questions could guide future research: Is Portuguese a matter of consideration in other provinces of the country? Is it associated with political affiliation as in urban settings? How is it located into one's identity construction when neighbouring countries speak English?

As mentioned by Mozambican authors¹¹⁸, the linguistic diversity in the country requires further research due to complexity and the number of languages spoken in the country.

In addition, due to political issues and to preserve the anonymity of my participants, I took the option of revealing only the gender and identification of each participant within each generation associated with group or family origin. I used different transcripts that are clearer in Portuguese, but when translated some of the meaning and significances is lost. Numbering the participants in the footnotes to distinguish who is speaking in each gen-

¹¹⁷See the study I conducted in 2011 to 2003 regarding three generations (grandmother, mother and daughter or grandfather, father and son) of the Portuguese Jewish Community: Xénia de Carvalho, *Identidade e Memória na Comunidade Israelita de Lisboa* (Lisboa: Imprensa das Ciências Sociais, 2014).

¹¹⁸See footnote 28, Table 2: Linguistic groups of Mozambique and sub-divisions.

eration throughout the quoted interview material was a possibility that I considered. However, I thought it may compromise interviewees' anonymity and possibly put them in danger of political or other retribution. In short, knowing specifically who was being quoted would have perhaps offered more transparency at the expense of compromising the interviewees.

Conclusions and implications

With the three generations of Mozambicans, the (re)uses of languages are contested, accepted and questioned from socialism, democracy to neoliberalism. However, with independence and having no *lingua franca* in the country, the former colonial language seemed to be the most 'neutral' language to create the idea of a nation¹¹⁹, the nation-state of Mozambique. Though, the (re)use of Portuguese language is an *ideological* process described over the three generations, mainly present in the 'hidden transcripts' when telling the story within the historical context, underlining the idea that

Language policy, consequently, should best be seen as a *niched* activity, and the same goes for its desired product, national identity. We can now identify it as a *niched ideological* activity, necessarily encapsulated in and interacting with many others, regardless of how dominant it may seem at first sight.¹²⁰

Ethnic and national identities are present in the (re)uses of languages in contemporary Mozambique, where Portuguese language is a symbol of inequality and not of a nation-state with more than 20 national languages. Portuguese was chosen after independence to unify the nation, but only represents people with formal education, and able to study abroad; it gives them access to formal jobs, describes an urban minority in the southern region of the country and is symbolically associated with a particular political affiliation (i.e., Frelimo). The language policy implemented after independence followed the patterns of colonial language policies, promoting as well resulting in social exclusion when facing the linguistic diversity in Mozambique. Indeed, losing the past, the history, is something that crosses all three generations when mentioning the fact that Portuguese is, on an onstage level (i.e.,

¹¹⁹About how nations were/are created see Smith, *National Identity*; Anthony Smith, *The Ethnic Origins of Nations*, (Oxford: Blackwell, 1986); Benedict Anderson, *Imagined Communities: Reflections on the Origin and Spread of Nationalism* (New York: Verso, 2006).

¹²⁰J. Blommaert, "Language Policy and National Identity." in Thomas Ricento, ed., *An Introduction to Language Policy: Theory and Method* (Malden, MA: Blackwell, 2006), 249-250.

public transcripts), the dominant language in their lives. One participant said, sadly: “Agora eu sonho em português ...” (“Now, I dream in Portuguese ...”¹²¹).

Conversely, the Portuguese language is not hegemonic in the Mozambican linguistic landscape. The (re)uses of national languages when interacting in the daily life, especially outside the capital city, in which people ask “mas tu estás a falar Português, tu és branco para tu falares Português? Fala lá uma língua para a malta se entender!” (“but you are speaking Portuguese, are you white to speak Portuguese?! Speak a language that we can understand!”¹²²), are also representative of how the nation is constructed, the nation besides the political elites ruling in the southern region of the country. Clearly, “it is evident that non-dominance does not necessarily imply being subordinate or oppressed.”¹²³ Portuguese as the official language reflects “ideological processes, that is, processes that need not in any significant way reflect what people in the nation actually use in the way of language.”¹²⁴

Languages are part of the “repertoire”¹²⁵ used by the three generations to construct their social and national identities, knowing that “language speaks, that is, shows, makes present, brings into being ... language as belonging to being requires, then, that one reverse the relation once more and that language appears itself as a mode of being in being”¹²⁶. To be is to speak, to speak is to be within each language. When one’s identity is claimed in Portuguese, it is similar to conquer the “Western European city,” or the “colonial city,” or “*a cidade de cimento*.”¹²⁷ Conversely, claiming one’s identity in national or local languages is to remember and (re)share family and social

¹²¹Transcript of Life History, Male Participant, 1st Generation/Socialism.

¹²²As mentioned previously by a male participant of the 2nd generation/democracy, footnote 115.

¹²³C. B. Pailston, and K. Heidemann, “Language Policy and the Education of Linguistic Minorities.” in Thomas Ricento, ed., *An Introduction to Language Policy: Theory and Method* (Malden, MA: Blackwell, 2006), 294.

¹²⁴Blommaert, “Language Policy and National Identity” 243.

¹²⁵Blommaert, “Language Policy and National Identity” 245.

¹²⁶Paul Ricoeur, *The Conflict of Interpretations: Essays in Hermeneutics* (USA: Northwestern University Press, 1974), 265.

¹²⁷“Conquistar a cidade de cimento” (in Portuguese), meaning “conquer the concrete city” or “to go and live in the white people’s city” – being white as a symbol of wealth and social status.

histories to continue the family legacy and history outside *modernity*, in which the hidden transcripts are underlined, and the level of counter-narratives are (re)used to organize social life.

Implications for further research could include future investigations regarding the (re)uses of Portuguese language in rural regions of Mozambique such as the population that have no access to formal education, representing most of the population, could reveal far more details on how languages are (re)used to construct not only a national identity, but national identities in Mozambique. Indeed, the research revealed the importance of understating the (re)use of languages to (re)create national identities, underlining the ambiguous role of Portuguese language in one's identity construction process.

Portuguese-Canadians as “Dark-Whites:” Dynamics of Social Class, Ethnicity, and Racialization through Historical and Critical Analysis ¹

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Introduction

Six years before multiculturalism was introduced in 1971, Porter described the way in which Canadian society was organized in relation to social class and ethnic stratification in *The Vertical Mosaic*. He believed that Canada represented a mosaic in terms of hosting diverse ethnic groups, but also that there existed a vertical relationship between the various ethno-cultural groups because each had disproportionate economic and political power.² In this hierarchical order, southern and eastern European groups (e.g., the Portuguese) fell between so-called preferred (northern and western Europeans) and so-called non-preferred (immigrants from non-European origins) groups. He argued that “in-between” ethno-cultural European groups had weaker access to educational and occupational opportunities than northern and western European groups, and that they were more likely to be concentrated in manual and less-skilled occupations in an ethnically and economically stratified society. Furthermore, ethnic affiliation of these groups could block them from upward mobility.

Today, Canada’s demographic structure is racially and ethnically much more diverse than it was during the period in which Porter provided his analysis of the Canadian mosaic. With the elimination of overt racial preference

¹This study is part of my doctoral dissertation research at Western University. It was approved by the Western University Health Science Research Ethics Board in February 2015; and was partially funded by Sociology Department and the Faculty of Social Science at Western University.

²John Porter, *The Vertical Mosaic: An Analysis of Social Class and Power in Canada* (Toronto: University of Toronto Press, 1965), xi–xii.



from the immigration policy in 1962 and the introduction of the point system in 1967, racial and ethnic diversity increased.³ According to Statistics Canada, while 4.7 percent of the total Canadian population belonged to “visible minority” groups in 1981, this number increased to 22.3 percent in 2016.⁴ Furthermore, it is projected that between 29 and 32 percent of the total Canadian population will be “visible minority” persons by 2031.⁵

As a result of this drastic change in the demographic structure of Canadian society, some argue that Porter’s ethnic hierarchy—the social stratification of groups based upon their cultural characteristics—was replaced by racial hierarchy (social stratification of groups based on their phenotypical characteristics). Previously marginalized European groups had become an indistinguishable part of the dominant groups.⁶ However, there are some exceptions to this racialized hierarchy in Canada. The Portuguese, as a European and “non-visible” group, continue to be overrepresented in manual and low-status occupations, and their educational level lags behind other European groups and some racialized groups.⁷

The marginalized position of the Portuguese as a European group shapes this study’s research question. Portuguese-Canadians, who immigrated mostly from Portugal and sometimes its former colonies (e.g., Brazil) are

³Alan B. Simmons, *Immigration and Canada: Global and Transnational Perspectives* (Toronto: Canadian Scholars’ Press, 2010), 73.

⁴Statistics Canada, “2016 Census Topic: Immigration and Ethnocultural Diversity,” <http://www.statcan.gc.ca/pub/11-627-m/11-627-m2017028-eng.htm>

⁵Statistics Canada, “Projections of the Diversity of the Canadian Population (2006 to 2031)” (Ottawa, 2010), 23, <http://www.multiculturalmentalhealth.ca/wp-content/uploads/2014/01/projections-of-diversity-2006-31.pdf>.

⁶Edward Galabuzi, *Canada’s Economic Apartheid: The Social Exclusion of Racialized Groups in the New Century* (Toronto: Canadian Scholars’s Press, 2006); Jason Z. Lian and David Ralph Matthews, “Does the Vertical Mosaic Still Exist? Ethnicity and Income in Canada, 1991,” *Canadian Review of Sociology* 35 (4) (2008): 461–81; Krishna Pendakur and Ravi Pendakur, “Color by Numbers: Minority Earnings in Canada 1995-2005,” *Journal of International Migration and Integration* 12 (3) (2011): 305–29; Howard Ramos, “From Ethnicity to Race in the Canadian Review of Sociology, 1964 to 2010,” *Canadian Review of Sociology* 50 (3) (2013): 337–56.

⁷Fernando Nunes, “The Underachievement of Portuguese-Canadian Youth: An Ongoing Phenomenon,” *International Network on Youth Integration Journal* 5 (1) (2014): 4–9; Robert Kenedy and Fernando Nunes, “An Analysis of Civic Identity and Participation Among Portuguese-Canadian Youth in Québec and Ontario,” *Portuguese Studies Review* 20 (2) (2012): 101–41; Michael Ornstein, “Ethno-Racial Groups in Toronto, 1971-2001: A Demographic and Socio-Economic Profile,” York University Institute for Social Research, Toronto (2006).

automatically lumped under the “white” category because of their European background. Adopting a critical understanding of whiteness, this article will explore the question of “whiteness” among Portuguese-Canadian research participants. In particular, its principal research question will examine whether or not Portuguese-Canadians are, in fact, white. This is a critical question to raise, as I argue that not all ethnic whites experience whiteness similarly. I also provide inquiry with regard to the ways the Portuguese view themselves: Do they match the ways in which others see them in Canada? Identity is not simply a personal choice.⁸ It is constructed by way of an ongoing interaction between asserted (how one sees oneself) and assigned (how one is seen by others) identities.⁹ For instance, some of my Portuguese participants self-identify as white, but does their view of themselves match the way they are seen by the majority in Canada? Using these questions, this paper contributes to existing theories of racialization and whiteness with a particular focus upon Portuguese-Canadians in Toronto.

First, I will present the methodological approach of this study. Second, I will use a historical and critical approach to provide a background for the discussion of the study topic. I will argue that even before Portugal’s colonial empire collapsed during the first half of the eighteenth century, the whiteness of the Portuguese was questionable in the English-speaking world. Third, drawing from the literature and twenty interviews with Portuguese-Canadians in Toronto, this study will argue that low socio-economic positions and the cultural background of the Portuguese give shade to their whiteness. The claim here is that social class and culture can confer social color. The whiteness of the Portuguese is not solely related to their skin color and/or their European origin. Any discussion of the whiteness of the Portuguese is related to their social class and cultural background because hegemonic whiteness refers to “white-skinned,” upper-middle-class, Anglo-Saxon, Protestant English speakers.”¹⁰ The Portuguese can be sociologically defined

⁸Mary C. Waters, “Optional Ethnicities: For Whites Only?,” in Margearet L. Anderson and Patricia Hill Collins, eds., *Race, Class, and Gender: An Anthology* (Belmont, CA: Cengage Learning, 2010), 201–209.

⁹Stephen Cornell and Douglas Hartmann, *Ethnicity and Race: Making Identities in a Changing World*, 2nd ed. (Thousand Oaks & London & New Delhi: Pine Forge Press, 2007).

¹⁰Edward Murguia and Tyrone Forman, “Shades of Whiteness: The Mexican American Experience in Relation to Anglos and Blacks,” in Ashley W. Doane and Eduardo Bonilla-Silva, eds., *White Out: The Continuing Significance of Racism* (New York, London: Routledge, 2003), 63–80.

as a racialized group, with their social color giving shade to their whiteness. Accordingly, this paper prefers to use Harney's term, "dark-white," to address Portuguese living in the English-speaking world ¹¹ instead of "white," for the latter is not sufficiently nuanced.

The term *dark-white* has significant implications. First, whiteness is a complex category. Addressing all groups of European origin as equally white is simplistic because there exist varying degrees of whiteness. Second, lumping all groups of European origin into the category of "white" overlooks the unique needs of other European ethnicities (e.g., the Portuguese-Canadians). Third, although skin color is the most important criterion of racialization, social class and culture also play a role. The theories and concepts guiding this paper include racialization, whiteness studies, immigration, capitalism, and development.

A brief history of Portugal

Located in the southwestern part of Europe, Portugal consists of a mainland and two autonomous archipelagos, Azores and Madeira.¹² In the fifteenth-century, 300 years after its establishment, Portuguese expansion began in an effort to control trade routes and exploit the natural resources of other regions.¹³ Portuguese military domination and trade networks extended from Brazil to the north and west coasts of Africa, India, Malaysia, China, and Japan.¹⁴ Its colonial expansion began with the conquest of the Moroccan coast in 1415 and ended with the independence of the African colonies of Angola, Cape Verde, Mozambique, Guinea-Bissau, and São-Tomé, and Príncipe in 1975.¹⁵

¹¹Robert F. Harney, "Portuguese and Other Caucasians: Portuguese Migrants and the Racialism of the English-Speaking World," in David Higgs, ed., *Portuguese Migration in Global Perspective* (Toronto: The Multicultural History Society of Ontario, 1990), 113-35.

¹²David Higgs, *The Portuguese in Canada* (Ottawa: Canadian Historical Association, 1982), 3; Carlos Teixeira and Victor M. P. Da Rosa, "Introduction: A Historical and Geographical Perspective," in *The Portuguese in Canada: From the Sea to the City* (Toronto: University of Toronto Press, 2000), 4-5.

¹³David Higgs, "Portuguese Migration before 1800," in David Higgs, ed., *Portuguese Migration in Global Perspective* (Toronto: Multicultural History Society of Ontario, 1990), 9.

¹⁴Maria Beatriz Rocha-Trindade, "The Portuguese Diaspora," in Carlos Teixeira and Victor M.P. Da Rosa, eds., *The Portuguese in Canada: From the Sea to the City* (Toronto: University of Toronto Press, 2000), 19.

¹⁵Stanley L. Engerman and João Cesar das Neves, "The Bricks of an Empire 1415-1999: 585 Years of Portuguese Emigration," Rochester Centre for Economic Research Working Pa-

In the fifteenth and sixteenth centuries, Portuguese overseas expansion built trade networks that included stations on the coast of Africa, India, and China.¹⁶ Portuguese traders immigrated to these coasts, did business between these stations, and dominated commerce in this area, trading precious materials like gold, ivory and spices, as well as slaves from Africa. In the first half of the sixteenth century, the Portuguese conquered Brazil, and production of staples overtook trade. Brazil was a source of sugar, cotton, coffee, and large deposits of precious metals. Sugar, then Brazilian gold, became the main sources of the prosperity of the Portuguese empire.¹⁷ Portugal rose up as a hegemonic power in 1640.¹⁸

In the second half of the sixteenth century, the major emigration destination shifted to Brazil.¹⁹ In particular, literate Portuguese men immigrated to Brazil, taking control of commerce in Brazilian cities and acquiring significant wealth. The Portuguese bourgeoisie invested in Brazil, but in the interest of higher profits, did not promote the development of local industry on the mainland during this time because Portugal had a restricted domestic market with a small population.²⁰ Mercantile policies were also blocking Portugal from expanding into non-Portuguese colonies as new markets. Hence, impoverished living conditions in Portugal pushed poor people to immigrate to Brazil for better living conditions. Some arrived as indentured workers; others engaged in commerce and started small businesses, such as grocery stores.²¹

By the second part of the seventeenth century, the Portuguese Empire had lost influence due to the rise of the Dutch and British empires. The independence of Brazil in 1822 was the biggest blow to Portugal, and put an

per (1996), 2.

¹⁶Rocha-Trindade, "The Portuguese Diaspora," 19–29; Higgs, "Portuguese Migration before 1800," 8–9.

¹⁷Engerman and Neves, "The Bricks," 5; Rosana Barbosa-Nunes, "Immigration, Xenophobia, and the Whitening of the Brazilian Population," *Journal of Transatlantic Studies* 2 (1) (2004): 59; Higgs, "Portuguese Migration before 1800," 11, 14.

¹⁸Immanuel Wallerstein, *The Modern World System II: Mercantilism and The Consolidation of the Europe and World Economy, 1600-1750* (Toronto: Academic Press, 1974), 184.

¹⁹Rocha-Trindade, "The Portuguese Diaspora," 20–21; Engerman and Neves, "The Bricks," 19; Barbosa-Nunes, "Immigration, Xenophobia," 61–62.

²⁰Craig A. Lockard, *Societies, Networks and Transitions. A Global History, Volume II: Since 1450*, 2nd ed. (Boston: Cengage Learning, 2010), 464.

²¹Barbosa-Nunes, "Immigration, Xenophobia," 61–62.

end to its colonial dominance in the region. This was a significant period that saw reverse emigration to Portugal.²² By the beginning of the twentieth century, Portugal had limited control over trade routes and its possessions. Portugal as an empire came to an end after the liberation wars in Africa and the expulsion of the Portuguese from India in 1961. Subsequently, African countries gained independence in 1974 and 1975, Timor in 1976, and Macao, China in 1999.²³

As Wallerstein's world-system theory suggested, shifts can occur in the worldwide economic hierarchical structure.²⁴ States, regions, and localities can lose or gain economic strength as a sort of "upward and downward mobility." This arises as a result of worldwide economic changes that occur primarily during stagnation and contraction periods. The economic roles of these areas may change.²⁵ In the seventeenth century, while some core areas like Portugal and Spain declined into semi-peripheral positions, others established themselves as the core (e.g., northwest Europe and British America).

Wallerstein's world-system analysis has faced criticism for a wide variety of reasons, including his sole focus on nation-states and his strict geographical analysis of global inequality, especially with regard to new global structures in the twenty-first century and his negligence of internal capitalist production relations.²⁶ However, there remains some merit in his functional analysis of the core, periphery, and semi-periphery model. Furthermore, his theory provides a strong explanatory tool for the mercantilist system in the context of nation-states with a strong say over trade policies.

During its heyday as a hegemonic power in middle of the seventeenth century, the basis of Portugal's wealth was mainly slaves, exploitation of precious metals, missionary expansion, and commerce.²⁷ As Santos mentioned,

²²Engerman and Neves, "The Bricks," 6-7.

²³Rocha-Trindade, "The Portuguese Diaspora," 20.

²⁴Wallerstein, *The Modern World System*, 179; Immanuel Wallerstein, "The Rise and Future Demise of the World Capitalist System: Concepts for Comparative Analysis," *Comparative Studies in Society and History* 16 (4) (1974): 407.

²⁵Wallerstein, *The Modern World System*, 179.

²⁶William I. Robinson, "Globalization and the Sociology of Immanuel Wallerstein: A Critical Appraisal," *International Sociology* 26 (6) (2011): 723-45.

²⁷Alejandro Portes and John Walton, *Labor, Class, and the International System* (New York; Toronto: Academic Press, 1981), 113.

Portugal was always “more colonial than capitalist.”²⁸ In contrast with Britain and France, the Portuguese bourgeoisie was not successful in investing this wealth into the development of productive forces and the accumulation of capital.²⁹ Portugal, therefore, could not transform the wealth it appropriated from its colonies into direct production and manufacturing, and instead squandered it. As stated by Marx, “a country which seeks to preserve the existence of pure mercantilist capitalist activities when other countries are effecting the transition to manufacturing production condemns itself to economic backwardness.”³⁰

In addition, instead of financing local industry, Portugal put a large amount of its wealth into religious activities.³¹ The people of Portugal were governed by a corrupt tyranny of state and church.³² Northern European travelers described Portugal as an undeveloped country with precarious living conditions such as lack of hygiene and domination by irrationality and ignorance. A report by three visitors to Portugal between 1720 and 1730 explained the situation as follows:

The general picture one gathers of the country is that of a fertile, rich land, yet squandered, and living off Brazil’s gold almost exclusively. Most of the clothing, most timber for urban and naval construction, most of the necessities of life, all came from abroad, from England and Holland, and purchased with Brazilian gold. The Portuguese are lazy and do not take advantage of their riches, nor do they know how to sell their colonies’ riches well.³³

Even before the colonial empire collapsed during the first half of the eighteenth century, the whiteness of Portuguese began to be questioned.

²⁸Boaventura de Sousa Santos, “Between Prospero and Caliban: Colonialism, Postcolonialism, and Inter-Identity,” *Luso-Brazilian Review, Special Issue: Portuguese Cultural Studies* 39 (2) (2016): 9–43.

²⁹Elizabeth Rachel Leeds, “Labor Export, Development, and the State. The Political Economy of Portuguese Emigration,” PhD Thesis (Massachusetts Institute of Technology, 1984), 61.

³⁰As cited in Anton L. Allahaar, *Class, Politics, and Sugar in Colonial Cuba* (Queenston, Ont, Lewiston N.Y: Edwin Mellen Press, 1990), 6.

³¹Joseph De Barros, “Discoveries and Martyrs of Missionary Expansion,” in Teotonio R. De Souza, ed., *East Discoveries, Missionary Expansion and Asian Cultures* (New Delhi: Concept Publishing Company, 1994), 85–87; Lockard, *Societies, Networks and Transitions. A Global History*, vol. 2, *Since 1450*, 464.

³²Santos, “Between Prospero and Caliban,” 23.

³³As cited in Santos, “Between Prospero and Caliban,” 21.

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criterion of whiteness. Hence, they are not as white as groups who fall under hegemonic whiteness, such as middle-upper class English-Canadians.

The Portuguese are categorized and stigmatized as “other” based upon occupation. When speaking about jobs held by the Portuguese in general, Aoran, a second-generation Portuguese who works as a teacher, explained how he was discriminated against on the grounds of his Portuguese ethnicity:

We are usually working-class people, and so I think there is a little bit disrespect. It always seems that I am the only Portuguese person who is a teacher in the building. The other Portuguese person is the cleaner or the caretaker. So, there are jokes about me, like ‘you should be there, and you should be doing this job, instead.’ Anytime I introduce myself as Portuguese, the reaction is, ‘Oh, my cleaning lady is Portuguese.’ So, the negative associations people make upset me.

Although Portuguese-Canadians earn less than the Canadian average,¹⁰⁸ unemployment and poverty are not major problems for the community. They also have a high rate of homeownership¹⁰⁹ as well as a strong network of contacts—social capital—within their ethnic community.¹¹⁰ This helps them find employment and other forms of social assistance. That being the case, they do not necessarily rely upon mainstream institutions, thereby limiting the process of whitening.

As the Portuguese stand somewhere in between on the scale of white to black, they only have partial white privilege. There are various examples that prove this. Compared to most of the semi-skilled jobs normally held by people of color, Portuguese men’s semi-skilled jobs have not always been necessarily low-paying or insecure because of a high level of union participation and their role in the Laborers’ International Union of North America.¹¹¹ Moreover, none of my research participants are discriminated against by po-

¹⁰⁸Nunes, “Marginalisation, Social Reproduction,” 128; Ornstein, “Ethno-Racial Groups,” 146.

¹⁰⁹Kenedy and Nunes, “An Analysis of Civic;” Edite Noivo, *Inside Ethnic Families: Three Generations of Portuguese-Canadians* (Montreal: McGill-Queen’s University Press, 1997); Carlos Teixeira and Robert E. Murdie, “On The Move: Portuguese in Toronto” in Carlos Teixeira and Robert E. Murdie, eds., *The Portuguese in Canada: Diasporic Challenges and Adjustment* (Toronto: University of Toronto Press, 2009).

¹¹⁰Teixeira and Murdie, “On The Move,” 196-197.

¹¹¹Daniela Costa, “The Price of Prosperity: Portuguese Labourers in Toronto” (Toronto, December 2012), <http://heritagetoronto.org/the-price-of-prosperity-portuguese-labourers-in-toronto/>; Jeffrey G. Reitz, *Warmth of the Welcome: The Social Causes of Economic Success for Immigrants in Different Nations and Cities* (Boulder, Colo.: Westview Press, 1998).

lice, such as carding based on phenotype. Another example of their partial white privilege is that according to Abada and Lin's research, though second-generation Portuguese have a lower level of education than most second-generation citizens of color, they earn higher incomes than those groups.¹¹²

The white working class embraced a racial identity rather than adopting an identity framed around social class because they have received public and psychological benefits by joining or associating themselves with the "white" race.¹¹³ Although Portuguese workers receive low wages, they are compensated with material benefits, including union membership, higher monetary wages, and psychological wages (such as higher social status compared to working-class citizens of color). Accordingly, a number of my research participants see themselves as white because of their light skin color. Mary, a second-generation Portuguese, explained the way she sees herself as a white person:

In every kind of way ... economically, politically, you know, kind of your living standards. If you are white, you are white, right? It is not even just about your nationality. It is about color. If you are visibly white, I think that is all. If you are white, you kind of have a statistically better lifestyle. People [of color] or of different races ... have a lower standard of life versus if they are visibly white.

Nonetheless, this study presents a critical understanding of whiteness as defined by power relationships and white skin color. Even if some of my participants see themselves as white, Canadian society does not see them as fully white. Society otherizes them as the ones who are destined to be construction workers or cleaners. The younger generation of Portuguese is known to be underachieving and dropout-prone. The media depicts the Portuguese and their problems as a part of the working-class community, thereby influencing the way the Canadian society at large sees them.¹¹⁴

Poor political representation of Portuguese-Canadians is another dimension that gives shade to the whiteness of this group.¹¹⁵ For instance, in 2001,

¹¹²Teresa Abada and Sylvia Lin, "Labour Market Outcomes of the Children of Immigrants in Ontario," *Canadian Studies in Population* 41(1-2) (2014): 84-85.

¹¹³W.E.B. Du Bois, *Black Reconstruction in America.1860-1880* (New York: The Free Press, 1998).

¹¹⁴Clifton, "Fragmented Citizenship," 411; Emanuel A. da Silva, "Sociolinguistic (Re)Constructions, 292.

¹¹⁵Irene Bloemraad, "Invisible No More? Citizenship and Politics among Portuguese Canadians," in Carlos Teixeira and Victor M.P. Da Rosa, eds., *The Portuguese in Canada*, 2nd

the proportion of elected Portuguese officers to the total number of Portuguese living in Toronto was 0.28, which signifies weak political representation, as this proportion was under 1. This proportion was 0.92 for Jamaicans, one of the most racialized groups in Canada. However, it was 1.83 for Anglo-Saxons and 2.52 for Italians, signifying strong political representation for both groups because the proportion was higher than 1. In this sense, political representation of Portuguese is closer to Jamaicans and other racialized communities rather than to whites.¹¹⁶ Another example of political underrepresentation was the election in 2004 of the first Portuguese-born member of the federal parliament.¹¹⁷ On average, the Portuguese as a European group lack the same level of socioeconomic and political power as other white European groups. Hence, their whiteness is limited.¹¹⁸

As mentioned earlier, whiteness is not only defined by socioeconomic status and white skin color, but also by cultural practices.¹¹⁹ Based upon certain cultural determinants of whiteness, including command of English, accent, and religion,¹²⁰ the Catholic background of the Portuguese community also puts them a bit further away from hegemonic whiteness, which is defined around Protestant Christianity. In the years following to their arrival in Canada in the 1950s, the Portuguese as a Catholic, family-oriented, Portuguese-speaking community were seen as culturally “backward”¹²¹ in contrast to the modernity associated with white Anglo-Saxon Protestant (WASP) English-speaking groups.

ed. (Toronto: University of Toronto Press, 2009), 161–90; Myer Siemiatycki, “Reputation and Representation: Reaching for Political Inclusion in Toronto,” in Caroline Andrew, John Biles, Myer Siemiatycki and Erin Tolley, eds., *Electing a Diverse Canada: The Representations of Immigrants, Minorities, and Women* (Vancouver: UBC Press, 2008), 23–45.

¹¹⁶Siemiatycki, “Reputation and Representation,” 32–33.

¹¹⁷Bloemraad, “Invisible No More?” 161–87.

¹¹⁸Vic Satzewich, “Whiteness Limited: Racialization and the Social Construction of ‘Peripheral Europeans,’” *Social History/Histoire Sociale* 33 (66) (2000): 271–89.

¹¹⁹Frankenberg, “Growing up White.”; Murguía and Forman, “Shades of Whiteness.”; Stubblefield, “Mediations.”

¹²⁰Murguía and Forman, “Shades of Whiteness.”

¹²¹Luis L.M. Aguiar, “The New ‘In-Between’ Peoples: Southern-European Transnationalism,” in Alan B. Simmons and Dwaine Plaza, eds., *Transnational Identities and Practices in Canada* (Vancouver: UBC Press, 2006), 205.

The Portuguese are still not recognized as fully white, even if the wider society no longer discusses them as a racialized community. For instance, as anecdotal evidence to their limited whiteness, Da Silva reported that he himself saw the words “white niggers [sic] of Europe” on the backdoors of a church in Toronto’s Little Portugal in 2008.¹²² When speaking about Portuguese identity, Sam, who is 46 years old, defined himself Portuguese because of events based in Roman Catholic calendar, such as feast days and Easter. The fact that Portuguese culture is based in Catholic religion therefore serves to shade their whiteness.

In a similar vein, most Portuguese participants in this study did not claim to be fully white. They argued that they were not as white as some Europeans because of their Portuguese culture. For instance, Siobhan, a second-generation Portuguese participant, explained that she is not white, but olive-colored:

Family values and religion ... being close to family ... All my friends at work moved out of their parents’ houses when they were nineteen. They found it weird that at the age of twenty-four, I was still living with my parents. Portuguese move out when they are married ... I feel like being Catholic is being Portuguese, and being Portuguese is being Catholic, because it is so ingrained in Portuguese culture.

As a sign of cultural difference from the white norm, some Portuguese immigrants still have not gained full comprehension of English, even though they arrived in Canada in the 1970s or 1980s. This is mainly because they have their own formal organizations providing some of the necessary services to their ethnic communities. This refers to a high level of institutional completeness.¹²³ They are, essentially, a self-sufficient community, with ethnic organizations and businesses such as bakeries, grocery stores, real estate agencies, travel agencies, churches, and banks serving in the Portuguese language.¹²⁴ Utilizing ethnic networks, ethnic economies help recruit co-ethnic workers.¹²⁵ For instance, Portuguese in construction and cleaning services have a high chance of having Portuguese co-workers, so

¹²² da Silva, “Sociolinguistic (Re)Constructions,” 73.

¹²³ Raymond Breton, “Institutional Completeness of Ethnic Communities and the Personal Relations of Immigrants,” *American Journal of Sociology* 70 (2) (1964): 194.

¹²⁴ Nunes, “Striking a Balance,” 121; Teixeira and Da Rosa, “Introduction,” 7-9; Teixeira and Murdie, “On The Move,” 196.

they don't have to learn English to communicate in the workplace.¹²⁶ The institutional completeness of Portuguese community has, indeed, moved them away from the conditions by which they could come closer to hegemonic whiteness. Ethel, whose parents arrived Canada in 1987, reported on her parents' occupations and knowledge of English:

My dad is doing labor. It is always sort of construction. Mum is always in cleaning ... My dad still does not speak English. His job is always working with Portuguese people in construction, so he has never needed to learn English.

Similarly, Charlotte, who is second-generation Portuguese, explained that even after her family moved to another neighborhood, her mother still did her banking in their old neighborhood because it offered service in Portuguese. When Murguia and Forman identify the conditions upon which whiteness is constructed, they include command of English as one of the criteria, along with social-class standing and phenotype.¹²⁷ Based upon their command of English, first-generation Portuguese are not white enough, as they do not have full comprehension of English.

The Portuguese as a racialized group

This paper acknowledges that people of color experience the harshest forms of racism in a color-coded society and argues that "white" ethnic groups can be racialized, too. *Racialization* refers to the process by which ethno-racial groups are stigmatized, marginalized, and designated as inferior and *other* by those who are in *power*.¹²⁸ Coming from the southern periphery of Europe, upon their arrival, Portuguese immigrants took occupations which, being physical, less skilled, and low-status, were associated with people of color.¹²⁹ Economic racialization¹³⁰ steered them into bad jobs. The Portuguese, therefore, became "dark" by association with blacks and the menial jobs they

¹²⁵Monica Boyd, "Agendas Family And Personal Networks In International Migration: Recent Developments And New Agendas," *The International Migration Review* 23 (3) (1989): 653.

¹²⁶Januário and Marujo, "Voices of Portuguese," 107.

¹²⁷Murguia and Forman, "Shades of Whiteness."

¹²⁸Herbert J. Gans, "Racialization and Racialization Research," *Ethnic and Racial Studies* 40 (3) (2017): 341-52.

¹²⁹Northrup, *Indentured Labor*, 22-23.

¹³⁰Gans, "Racialization and Racialization Research."

commonly performed. Whites, on the other hand, were associated with non-manual, skilled, high-status jobs. Although the skin color of the Portuguese was white or olive, their social standing—social color—was not white, and darkened them socially. Hence, their ethnicity and poor entry status into the labor market pushed them down the racial hierarchical ladder in the 1950s, where they became derided as “pork-chops” and “greasers.”¹³¹

Still, the manual, physically demanding, less-skilled jobs at which the Portuguese labor¹³²—jobs frequently associated with people of color—have served to racialize Portuguese-Canadians. Yet in recent decades, the Portuguese have come a bit closer to the white norm, and are no longer viewed as “probationary” whites, possibly in contrast to the increasing number of immigrants of color in Canada. Over time, the Portuguese also have come to be viewed as a hardworking and disciplined addition to the Canadian labor force.¹³³

Historically, biological color has been used by powerful groups—male, “white,” educated, European, and Christian—to assign meaning to oppressed groups as a marker of their social standing. For instance, Black people are often stigmatized as being immoral, violent, criminal, immoral, sexually over-active, less intelligent, and less capable of social achievement. In opposition to this negative construction of Blackness, white people are often associated with a high level of morality, civilization, intelligence and capability for social achievement.¹³⁴ Ethel, a nursing student, explained that how being Portuguese holds negative connotations:

If I don't say my background, they see me as anybody else. If they know I am Portuguese, then they see me differently. They start judging me, making false assumptions about me and the Portuguese ... uneducated, in construction and cleaning, just assuming that I am just the typical dropout. We are not that bright ... but hardworking ... they have a preconception of who I am. And that is not who I am ... Sometimes, I avoid telling people that I am Portuguese.

¹³¹Aguiar, “The New,” 203.

¹³²Ornstein, “Ethno-Racial Groups,” 142–46.

¹³³Costa, “The Price of Prosperity,” Nunes, “Marginalisation, Social Reproduction.”

¹³⁴Ari, “Centering the White Gaze: 70; Anton L. Allahar, “When Black First Became Worth Less,” *International Journal of Comparative Sociology* XXXIV (1–2) (1993): 43–44; Robert Miles, *Racism* (London: Routledge, 1999), 29–32; Yancy, “Introduction,” II–13.

Accordingly, the biological color of the Portuguese or their lighter skin pigmentation does not match their *social color* (i.e., social standing -low educational level and occupational ghettoization in low-status jobs). At this point, it can be contended that both the *social darkness* in the context of an overwhelmingly working-class community and the biological whiteness of the Portuguese have real consequences in their lives. One can even trump the other. In a racist system of social allocation of resources, the Portuguese can be sociologically defined as a racialized group, with their social color giving shade to their whiteness.

Though phenotype, especially skin color, is the first definitional criterion of racialization where social characteristics are attributed to a group based on their phenotype,¹³⁵ non-phenotypical characteristics, including, religion, speech patterns, and clothing, can serve as means of racialization.¹³⁶ In a situation where racialization *otherizes* group members based upon their cultural background, the Portuguese are racialized by the majority on the basis of a perception of backward Catholic Portuguese-speaking culture.¹³⁷

In addition to culture, some argue that the Portuguese are racialized because they are not physically similar to Anglo-Saxons, who are considered familiar.¹³⁸ The skin color of some Portuguese is “not quite white”¹³⁹, and they do not resemble standard, blue-eyed whites because of the high level of interracial mixing during the colonization period, which could also have created a basis for discrimination. Overall, as a brief summary, Duckword described the way an Anglo-Canadian sees the Portuguese:

I am going to give a description of the Portuguese in the eyes of the typical Canadian. ‘The Portuguese are dark and short. They speak a strange language that only they understand. They live in a neighbourhood of the City of Toronto: between Dundas and Bloor, Spadina and Dufferin. The Portuguese have a Portuguese market where [only] fish is sold, nothing more. The Portuguese talk a

¹³⁵Michael Omi and Howard Winant, *Racial Formation in the United States*, 3rd ed. (New York, NY: Routledge, 2015); George Sefa Dei, “The Intersections of Race, Class, and Gender in the Anti-Racism Discourse,” in *Inequality in Canada: A Reader on the Intersections of Gender, Race, and Class*, e(Don Mills, ON: Oxford University Press, 2010), 3–24.

¹³⁶Gans, “Racialization and Racialization Research.”

¹³⁷Aguiar, “The New,” 205; Harney, “Portuguese and Other Caucasians” 119–23.

¹³⁸Nunes, “Marginalisation, Social Reproduction” Aguiar, “The New.”

¹³⁹As cited in Aguiar, “The New.”

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emphasis on gender differences would reveal their different experiences in various realms, and hence potentially in their perception of whiteness.

Conclusions and implications

It is evident that not all European ethnic groups have equal access to dominant institutions, and some are marginalized based upon their social class and ethnic identities. Accordingly, this study shows that some light-skinned Portuguese in Toronto don't benefit fully from economic and cultural privileges associated with whiteness. Hence, this paper argues that Portuguese-Canadians are a racialized group, and they are not-quite-white.

This paper applied whiteness and racialization to the Portuguese-Canadian community as a theoretical framework in order to initiate debate in areas where the whiteness of the Portuguese-Canadian is questioned. In a traditional sense, the whiteness of the Portuguese is not questioned in Canada, because they are a community that originated in Europe. An objective criterion (e.g., country of origin) is used to categorize communities. As such, the Portuguese are recognized as a white group. However, this paper has presented a critical understanding of whiteness. Whiteness is a complex category. It is fractured along the lines of social class, ethnicity, and culture. One should be aware that groups categorized as white are not homogenous. Not all European ethnic groups are as white as other European groups. Some of them are "not-yet-white" because they do not hold all of the social characteristics of hegemonic whiteness¹⁴¹. It is in this vein that I argue that the Portuguese stand as socially darker on a scale of white to Black, because whiteness is a matter of degree. My discussion of the Portuguese as dark-whites in Canada stands as the major contribution of this paper to the literature on racialization and whiteness.

As an addition to the existing literature, my interviews demonstrated that the Portuguese are not seen as white according to their social color. Of course, 'black,' 'white,' and 'dark-white' all deal with matters of perception; but those perceptions lead to real consequences for the persons concerned. The Portuguese are stereotyped as or assumed to be underachievers in school, and construction workers and cleaners in the labor market, in oppos-

¹⁴¹James E. Barrett and David Roediger, "How White People Became White," in *White Privilege: Essential Readings on the Other Side of Racism*, ed. Paula S. Rothenberg, 4th ed. (New York: Worth Publishers, 2012), 39–44; Roediger, "Whiteness and Ethnicity."

ition to the intelligent, success-oriented white social construction. Additionally, Portuguese culture differs from the white Anglo-Saxon norm in many important ways. Hence, this paper argues that the Portuguese can, at best, be seen as white with regard to their phenotypical characteristics. They are dark-whites if one associates whiteness with economic and social power, as exemplified by their positioning in political and educational institutions and the labor market. The tendency to lump together all groups of European origin as white overlooks differential power distribution among European groups. Hence, certain unique needs of the Portuguese are ignored, and specific needs, such as those existing within educational institutions, are not addressed by social policy. Policymakers should not assess European groups as a homogenous entity, or develop policies addressing each group's specific needs. Successfully implemented, this kind of policy shift could lead to socioeconomic mobility for Portuguese-Canadians in Toronto. Based upon this possibility, and because racial identities are fluid and flexible, another implication of this study is that Portuguese-Canadians can approach or move into the boundaries of hegemonic whiteness over time via significant changes in economic, social, and political conditions.

This study initially attempted to examine the degree of whiteness within the light-skinned (and mostly working-class) Portuguese community in Canada. It has also identified some implications for future avenues of research. First, a significant area of future research would be to examine the degree of whiteness of other European groups in order to further contribute to the theory of whiteness. Additional research of social class and ethnic origin within European groups should be conducted. Second, future research with a potential contribution to the literature would conduct an equal number of interviews of working-class and middle-upper-class Portuguese to identify the role of social class in the definition of whiteness within the same ethnic group. Third, a study should be conducted with both dark-skinned and light-skinned Portuguese with regard to their perception of whiteness as phenotype is the first criterion of racialization and whiteness. Fourth, I had participants whose parents had immigrated from both mainland Portugal and Azores. There were no recognizable differences in perception of whiteness between two groups, perhaps because of the structuring of my questionnaire. It could be eye-opening to conduct a study on whiteness with an equal number of Portuguese immigrants from Azores and mainland Por-

tugal (in general, Azoreans are seen as “second-class” citizens within the Portuguese community). Fifth, as Portuguese women have more positive experiences in educational institutions than Portuguese men, research focusing specifically upon gendered perspectives of whiteness could represent a significant contribution to the literature.

Language of Non-belonging: Languaging Race and Portuguese-speaking Youth Subjectivities in a Toronto High School

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Introduction

Language has long shaped Canada's racial landscape and relations. The question of language in Canadian schools immediately conjures debates about French language and access to French immersion. French-speaking Canadians, particularly those outside of Quebec, have historically struggled to ensure French-language instruction especially prior to French language protections. Running alongside this story of language conflict in Canada, however, is another story, beginning perhaps with the systemic destruction of Indigenous languages in residential schools. Debates about language frequently intersect with race. Language continues to be a significant obstacle to integration and a source of discrimination for many newcomers to Canada, as well as some born in Canada who identify with certain ethnic and racial identities. Consider the 'Too Asian' debates that triggered a national conversation about the ethnic and racial composition of student populations on Canadian university campuses, and in Toronto, the persistent reporting of secondary student underachievement data on the basis of language categories, including Spanish- and Portuguese-speaking youth.¹ These language-specific data are interestingly grouped with those who are identified not by language but by racial indicators such as Black and Indigenous youth. Languaging race—highlighting language's central role in the construction, maintenance, and transformation of racial and ethnic identities—therefore,

¹Robert Brown, Lisa Newton and George Tam, *The Toronto District School Board's Student Group Overviews: Aboriginal Heritage, Afghan, Portuguese-Speaking, Somali-Speaking, and Spanish-Speaking Students*. Toronto: Toronto District School Board, 2015. <https://www.tdsb.on.ca/Portals/research/docs/reports/TDSB%20StudentGroupOverviews.pdf>.



is critical to understanding how language is implicated in the racial and ethnic construction of students in schools, because “language and immigration status matter at least as much as skin colour for non-Black minorities.”²

Whether through language, cultural traditions and practices, or one’s skin colour, many immigrants in Canada are reminded of their conditional belonging or visitor status within its white, colonial imaginary. Sunera Thobani argues in the Canadian context that “as a consequence of the continuities in the historical racialization of the category of citizen, and of the multi-tiered structure of citizenship, the institution itself remains obstinately racialized so that it refers not simply to a political identity but also to a white identity reinscribed as a political one.”³ Furthermore, the enduring symbolic attachment of citizenship to Whiteness (officially British and French) reifies a white racial identity as the “trustworthy marker of citizenship in daily life. Nationality and citizenship coexist in an overlapping manner, so that some citizens can claim nationality while others are denied such claims, even when they share the legal status of citizenship.”⁴ While citizenship and belonging for some is never contested, the immigrant/migrant/refugee subject risks perpetual estrangement or conditional inclusion to the extent that their language, cultural traditions and practices, or skin colour fail to reify white racial identity.

Reminders of conditional belonging reproduce settler colonial practices and impose an existing set of structures on those perceived as immigrants in Canada. Seemingly innocuous daily encounters identify and alienate certain cultural practices, including language, and those associated with such practices. Such daily encounters reveal non-Canadian origins, a place from which one ought to return or an expectation that one ought to learn/speak English. Processes and practices of surveillance, assimilation and elimination, found in many state institutions such as schooling, reproduce and reward acceptable forms of citizenship and subjectivity within Canada. Reminders of the association of citizenship with Whiteness abound for many in Canada. This process systematically discriminates often based on qualities and prior-

²Zeus Leonardo, “The Race for Class: Reflections on a Critical Raceclass Theory of Education,” *Educational Studies* 48 (5) (2012), 432.

³Sunera Thobani, *Exalted Subjects: Studies in the Making of Race and Nation in Canada*, (Toronto: University of Toronto Press, 2007), 100.

⁴Thobani, *Exalted Subjects*, 100.

ities that build the nation, similar to those that inform(ed) immigration priorities based on labour and other economic demands.

For ethnoracialized subjects in Canada, notions and feelings of contested or conditional belonging are shaped in part by the role of language in the country's early bicultural and bilingual framework and largely by overall structures of inclusion and exclusion. Used by the state to secure national unity and control, language policies in Canada "have functioned to manage racial difference through processes of erasure, forced assimilation and exclusion through the technology of language."⁵ French and English, to the exclusion of other languages including Indigenous languages, informed the origins of multiculturalism policy and belonging in Canada, specifically in relation to education and how language is linked to racializing practices that alienate those outside this bilingual framework.⁶ The *Canadian Multiculturalism Act* (1988) recognized that other languages may be used in Canada but there remained only two official languages (French and English). In other words, multiculturalism policy invites those living in Canada to practice linguistic pluralism "in harmony with the national commitment to the official languages of Canada."⁷ The *Act* falls short of protecting the language rights of those in Canada and particularly from the discrimination they may experience for speaking a language other than English and French in Canada, including in its schools.

Education continues to play a key role in consolidating a national identity based on unified culture(s) and official linguistic capacities that offer a path to modernity and national belonging in Canada.⁸ The specific role of language in the experiences of Portuguese-speaking youth in Toronto schools is poorly understood. The educational trajectories of Portuguese-speaking students in Toronto, Canada have long been defined by disproportionately higher rates of high school dropout.⁹ Along with Black youth, the 1995 Report of the Royal Commission on Learning specifically named Spanish- and

⁵Eve Haque and Donna Patrick, "Indigenous Languages and the Racial Hierarchisation of Language Policy in Canada," *Journal of Multilingual and Multicultural Development* 36 (1) (2015): 27-41.

⁶Eve Haque, *Multiculturalism within a Bilingual Framework: Language, Race, and Belonging in Canada*, (Toronto: University of Toronto Press, 2012).

⁷"The Canadian Multiculturalism Act." In Revised Statutes of Canada, 1985. Chapter 24 (4th Supplement). Ottawa: Government of Canada, 4.

⁸Haque, *Multiculturalism*; Thobani, *Exalted Subjects*.

Portuguese-speaking students as performing poorly in school, and Nunes offers a comprehensive literature review on the topic.¹⁰ In 1991, similar to Indigenous students, Portuguese students in Toronto had the second highest proportion of learners in basic level courses or non-academic program of study. More recent reports provide further context that despite some improvement Portuguese-speaking students continue this trend. Additionally, they exhibit higher rates of suspension and special education identification, and lower rates of graduation and application to post-secondary education.¹¹

These statistics are more staggering given the sizeable Portuguese-speaking population in Canada and Toronto. In 2006, 1.4% of Canada's population was of Portuguese ancestry, and in Toronto, Portuguese Canadians constituted roughly 4% of the population.¹² Toronto is home to a growing number of Portuguese-speaking inhabitants in addition to immigrants from Portugal and Canadians of Portuguese ancestry. Immigration from Brazil and several Portuguese-speaking African nations has steadily increased and congregated around Portuguese neighbourhoods in Toronto.¹³ In schools, however, it is difficult to count the number of Portuguese(-speaking) students since the language spans ethnoracial categories and because what determines Portuguese-speaking to one person may not translate to another. Recruitment of Portuguese-speaking students for this study, for example, revealed some

⁹Amie Presley and Robert S. Brown. *Portuguese-Speaking Students in the TDSB: An Overview* (Toronto: Toronto District School Board, 2011), <https://www.tdsb.on.ca/Portals/research/docs/reports/Portuguese-speakingStudentsInTheTDSBOverview.pdf>.

¹⁰Jim Cummins, "Minority Status and Schooling in Canada," *Anthropology & Education Quarterly* 28 (3) (1997): 411-30; Fernando Nunes, "Portuguese-Canadian Youth and Their Academic Underachievement: A Literature Review," *Portuguese Studies Review* 11 (2) (2004): 41-87.

¹¹Robert Brown and Cosmin Marmureanu. *Cohort graduation rates by ward, 2010-15. (Research Report No. 15/16-19)*. Toronto: Toronto District School Board, 2016. <https://www.tdsb.on.ca/Portals/research/docs/reports/CohortGradRatesbyWard2010-15.pdf>; Brown, Newton and Tam, *The Toronto*.

¹²Statistics Canada. 2011 National Household Survey: Data tables. Catalogue number 99-010-X2011028 in Statistics Canada. Ottawa, 2013. <https://www12.statcan.gc.ca/nhs-enm/2011/dp-pd/dt-td/Rp-eng.cfm?LANG=E&APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=0&GK=0&GRP=0&PID=105396&PRID=0&PTYPE=105277&S=0&SHO WALL=0&SUB=0&Temporal=2013&THEME=95&VID=0&VNAMEE=&VNAMEF=>

¹³Carlos Teixeira, "Barriers and Outcomes in the Housing Searches of New Immigrants and Refugees: A Case Study of 'Black' Africans in Toronto's Rental Market," *Journal of Housing and the Built Environment* 23 (4) (2008): 253-76.

of this confusion. An Angolan student and some Brazilian students, despite speaking Portuguese, assumed that the study targeted Portuguese students. Canadian-born Portuguese students along with those born in Portugal but raised in Canada who questioned their linguistic fluency assumed the study targeted newcomer or fluent Portuguese-speakers. The dominant perception from teachers, staff, administrators, and the majority of students was that my study on Portuguese-speaking students recruited Portuguese youth either from Portugal or of Portuguese ancestry, and specifically those who were academically underachieving. Students, therefore, were linguistically marked when heard speaking Portuguese in school and more often than not were assumed to be academically underachieving. Language rendered visible what for some remained an invisible minority status and language played a significant role in constructing racial and ethnic identities and non-belonging in school.

Many scholars have inventoried the benefits of classrooms inclusive of diverse cultural traditions and linguistic expression on student achievement and learning.¹⁴ Yet, students continue to encounter spaces and practices in schools that discourage their multilingualism and enforce linguistic hegemony.¹⁵ For instance, the recent and all too common local struggle to ensure language instruction through the International Languages (IL) program in Toronto schools reveals how IL is consistently at risk when the logic of balanced budgets and linguistic hegemony reigns.¹⁶ Similarly at risk, therefore,

¹⁴Jim Cummins, "Intercultural Education and Academic Achievement: A Framework for School-Based Policies in Multilingual Schools," *Intercultural Education* 26 (6) (2015): 455–68; Angelica Galante, "Pedagogical Translanguaging in a Multilingual English Program in Canada: Student and Teacher Perspectives of Challenges," *System* 92 (2020): 102274; Ofelia García, Susana Ibarra Johnson and Kate Seltzer, *The Translanguaging Classroom: Leveraging Student Bilingualism for Learning*, (Philadelphia: Caslon, 2017); Lindsey W. Rowe, "Say It in Your Language: Supporting Translanguaging in Multilingual Classes," *The Reading Teacher* 72 (1) (2018): 31–38; Shannon M. Daniel and Mark B. Pacheco, "Translanguaging Practices and Perspectives of Four Multilingual Teens," *Journal of Adolescent & Adult Literacy* 59 (6) (2016): 653–63.

¹⁵Nelson Flores, Jennifer Phuong and Karla M. Venegas, "Technically an EL: The Production of Raciolinguistic Categories in a Dual Language School," *TESOL Quarterly* 54 (3) (2020): 629–51; Lakia M. Scott and Elena M. Venegas, "Linguistic Hegemony Today: Recommendations for Eradicating Language Discrimination," *Journal for Multicultural Education* 11 (1) (2017): 19–30.

¹⁶Jeff Bale, and Mayo Kawaguchi, "Heritage-Language Education Policies, Anti-Racist Activism, and Discontinuity in 1970s and 1980s Toronto," *Critical Inquiry in Language Stud-*

are the benefits ethnoracialized linguistic minority youth derive from learning at school the language connected to their family's heritage and identity. Framed as non-essential and a luxury, parents and students in Toronto—including those for whom Portuguese is a heritage language and who largely value the IL program—are left to ponder whether the educational, emotional, social, and other needs of their students who use ethnoracialized languages matter less.

Exclusion of any kind on the basis of language is fundamentally linked to identity. More specifically, across all subfields of linguistics researchers forward the notion that race is not fixed or predetermined and instead racial and ethnic identities are (re)created through continuous and repeated language use.¹⁷ In other words, some sociolinguists, and raciolinguists in particular, argue the interrelatedness of language and race, where people's racialized status determines how their language use is perceived as a result of powerful raciolinguistic ideologies.¹⁸ Alim labels the project of highlighting language's central role in ethnoracial identification and struggle as *racing language*.¹⁹ He describes *linguaging race*, on the other hand, as theorizing race and ethnicity through the lens of language, which "highlights language's central role in the construction, maintenance, and transformation of racial and ethnic identities."²⁰ This powerful intervention urges us to interrogate the role of language in the lives of Portuguese-speaking students in Toronto schools.

I explore how responses and reactions by school personnel to students' Portuguese language use reveal assimilationist approaches to language di-

ies 17 (1) (2020): 5–25; Ryan Patrick Jones, "No International Language Learning during School Hours TCDSB Staff Recommend," CBC News, 12 July 2018. <https://www.cbc.ca/news/canada/toronto/no-international-language-learning-during-school-hours-tcdsb-staff-recommend-1.4743126>.

¹⁷H. Samy Alim, "Introducing Raciolinguistics: Racing Language and Linguaging Race in Hyperracial Times," in H. Samy Alim, John R. Rickford and Arnetta F. Ball, ed., *Raciolinguistics: How Language Shapes Our Ideas About Race* (Oxford: Oxford University Press, 2016), 1–30.

¹⁸Nelson Flores and Jonathan Rosa, "Undoing Appropriateness: Raciolinguistic Ideologies and Language Diversity in Education," *Harvard Educational Review* 85 (2) (2015): 149–71.

¹⁹Alim, "Introducing Raciolinguistics."

²⁰Alim, "Introducing Raciolinguistics," 7.

versity in schools.²¹ The case of Portuguese-speaking youth at Westside High School²² is an unexpected but rich example of languaging race, where students' racial and ethnic identities are, at least in part, constructed, maintained, and/or transformed by language. Specifically, the responses and reactions from school personnel directed towards Portuguese-speaking students inform whether or not some students speak Portuguese in school. Some students firmly insist on speaking Portuguese and resist the pressures to conform to speaking English while at school, particularly with their Portuguese-speaking friends. Other Portuguese-speaking students, however, elect to avoid speaking Portuguese and conceal their Portuguese-speaking identities, which they admit, improves how they are perceived and assessed by teachers and other school personnel. I refer to these two groups of students as language resisters and language concealers, respectively.

The language acts of Portuguese-speaking students in this study construct, maintain, and transform the subjectivities of Portuguese-speaking students. Additionally, language practices appear to shape Portuguese-speaking students' educational trajectories. To reflect on the role students themselves play in reversing the effects of speaking Portuguese in school, I present group interview dialogue between one language concealer and several language resisters to illustrate *critical language awareness* in action, which "engages youth in the process of consciousness-raising, that is the process of actively becoming aware of one's own positioning in the world and what to do about it."²³ In the group interview dialogue presented, language resisters raise the awareness of their peer's understanding of linguistic hierarchies and how speaking and identifying as Portuguese constructs and maintains their subjectivities.²⁴ Disciplining around language use "can be interpreted as enacting Whiteness and subscribing to an ideology of linguistic supremacy (elevating one particular language variety over all others) within

²¹Jim Cummins, *Language, Power and Pedagogy: Bilingual Children in the Crossfire* (Tona-wanda: Multilingual Matters, 2000); Angela Valenzuela, *Subtractive Schooling: U.S.-Mexican Youth and the Politics of Caring* (Albany: SUNY Press, 1999).

²²All research site and participant names are pseudonyms.

²³H. Samy Alim, "Critical Language Awareness," in Nancy H. Hornberger and Sandra Lee McKay, eds., *Sociolinguistics and Language Education*, 18 vols. (Bristol: Multilingual Mat-ters, 2010), 214.

²⁴Norman Fairclough, *Critical Language Awareness* (Boston: Addison Wesley Longman Limited, 1992; New York: Routledge, 2014).

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Azores and so he speaks some English. Rodrigo lives with his father and mother, and they only speak Portuguese with one another. His sister, however, lives back home in Portugal. I asked him about his friends. He said he has three true friends at school, who are all Portuguese, and then others who he cannot trust. I asked him why he cannot trust the others, but he did not answer. He proceeded to tell me about his “true” friends. They hang out at school sometimes, but it was tough because ever since they were told to stop speaking Portuguese, they have not really been the same. I asked him what happened. He went silent and stared forward, his face turning cold and expressionless. It was evident he was feeling something, and we remained this way for quite some time. I made space for his silence, for his feelings, which Rodrigo’s face and body slowly revealed. Always looking forward, he started to cry. Tears turned into sobbing, his head in his hands. Avoiding eye contact I watched him out of the corner of my eye and remained still. The two of us sat there, him crying, and me witnessing his pain. He went to wipe away his tears and I ask him what just happened, what that was about. He simply said that it was the first time he felt free to talk about “it.” I ask him what is “it?” He said all of it. I asked him to describe “it” to me. He said, the racism.

Rodrigo went on to tell me about that time he was in the playroom at lunch with his three friends—an interior space on the school’s top floor that was reserved for indoor sports, especially soccer. They were just chilling, watching the game and talking among themselves, when out of nowhere a teacher yells at them saying, “You’re in Canada, so speak English. Go back to Portugal if you wanna talk Portuguese.” Rodrigo said they had no idea what had just happened. “We weren’t doing anything wrong and all of a sudden he yells at us for speaking Portuguese, I mean what was that?” Asked whether the teacher said anything more, Rodrigo said, “No. He walked off and we were left wondering what the hell just happened.” Rodrigo went on to say it happens elsewhere too. “(Ms.) Lombardi picks on us for talking Portuguese all the time, don’t you see it? She’s always picking on us and never the ones who are speaking Chinese or Spanish or Filipino. Or in my science class, (Mr.) Carvers, that guy’s racist too. The four of us have that class together and the teacher is always getting us in trouble. I mean they put us in groups and then they don’t expect us to communicate, what difference does it make

if we speak Portuguese. I don't hand in my homework in Portuguese, so they all just need to chill."

Indeed, I too noticed how in Ms. Lombardi's class the Portuguese-speaking students were more frequently the ones to be hushed for speaking Portuguese or reminded to speak English and not Portuguese; behaviour that seems to test Ms. Lombardi's patience. Sometimes she even warned the class of her "short fuse" and during those classes she read out loud to the students or instructed them to work independently in silence. For the majority of the time, however, the students worked in groups. Portuguese-speaking students outnumber the others and tended to speak more loudly in class. Though she would occasionally call-out other groups of students for speaking their ancestral languages, Ms. Lombardi seemed less concerned with the use of Mandarin, Spanish or Tagalog. Groups of students, including ethno-racial linguistic minorities, are constructed differently based on dominant discourses. In local settings such as Ms. Lombardi's class, it is not simply a matter of speaking another language that marks a student for certain forms of linguistic discipline. That Portuguese-speaking students have historically been constructed as academic underachievers and more likely to drop out, speaking Portuguese in class mobilizes these discourses that circulate and linger.⁵⁴ Though impossible to know for certain, dominant depictions of Portuguese-ness may account for why Ms. Lombardi approached the groups of students differently.

Rodrigo reminded me of an episode that illustrated his experience of being singled out for speaking Portuguese and how he understood this as racist. The students' desks in the ESL classroom were grouped into clusters of 4 or 6, and although their teacher occasionally rearranged the seating, for the majority of the time students sat with their same-language peers. Four Mandarin speaking students sat close to the front and centre of the class. Behind them towards the back of the classroom and next to the teacher's desk sat a group of four Filipino students who all spoke Tagalog. In the opposite corner furthest from the teacher's desk and closest to the door at the front of the classroom was a group of four Portuguese-speaking girls, three from Portugal and one from Brazil. Finally, immediately in front of the teacher's desk furthest from the door were two sets of four desks occupied by 6 Por-

⁵⁴Foucault, *Archaeology*; Foucault, *Discipline*.

tuguese-speaking boys among several empty desks. A student from Romania tended to occupy one of these desks. Several Spanish-speaking students occupied the other cluster of four desks next to the Portuguese-speaking girls. From time-to-time students would move from one group to another, but unless instructed by their teacher, rarely did they elect to sit with students who spoke a different language than them. As a result, it was regular to hear Tagalog, Spanish, Mandarin, and Portuguese spoken in class.

One afternoon as students worked in groups, which they typically did, a slinging match in Portuguese of increasingly nasty insults ignited between two Portuguese-speaking students: Rodrigo and Frederica. It seemed to start with Frederica belittling Rodrigo's intelligence but quickly escalated into an all-out war of words, across the room, in which the two insulted one another's birth places, looks, and intelligence. An animated Frederica—half standing with her hands stretched out on her desk, supporting her weight—physically lunged forward with her verbal attacks. Rodrigo's words and tone were equally animated, but he remained seated. After half a dozen comments from each, their teacher, quite suddenly and aggressively, lashed out at Rodrigo and not Frederica, telling him she was sick of him and for him to take a walk, or “vai dar uma volta” as it was commonly known to many Portuguese-speaking students and even some non-Portuguese-speaking school personnel. This was a common timeout strategy at Westside that gathered a familiar community of students in the school's halls; students wandering them in an effort to avoid both being caught by a hall monitor and having to return to class. Rodrigo did return to class, however, and immediately Ms. Lombardi asked the Educational Assistant (EA) sitting at the back of the classroom to sit next to Rodrigo to ensure (announcing to the class) that he behave himself and refrain from speaking Portuguese. Begrudgingly, the EA moved a chair next to Rodrigo and the group of four desks where I too was seated. As she lowered herself in the chair, she sighed and said to Rodrigo, “What a heavy burden you are on me.” In his curt style, Rodrigo replied “Same.” Perhaps unsatisfied with his response the EA asked him, “Do you know what that means?” He replied, “Yes.” Rodrigo sat relatively silent for the remainder of class. Only when his EA asked him what he wanted to do with himself after school did Rodrigo go to speak. Before he could, the EA interrupted him with a reply to her own question. “Construction? I hope

not.” Rodrigo immediately remarked, “Miss, that’s racist,” to which she replied, “Yeah, I guess that is quite racist. I’m sorry.”⁵⁵

Another language resistor, Beatriz, described how simply speaking Portuguese in front of certain school personnel in the past elicited a response that left her feeling that she and her language do not belong in school. Beatriz described a moment while speaking with a friend in the hallway over her lunch period when she was told by a teacher to “go home if you’re not going to speak English.” She followed up by asking “are we still living in Toronto? I mean this is such a diverse city.” Because speaking Portuguese is a common way that teachers and other school personnel identify Portuguese-speaking students, language disciplining at times takes on non-language specific topics. Beatriz described this evolution when she shared with me one of the many times she had been asked “Are you even going to graduate?”

Beatriz, a normally joyful, positive, and forthright student, began recounting with noticeable frustration the story of when Westside’s Principal asked her this seemingly innocuous question when she was sent to his office over wearing non-uniform shoes following the previously mentioned incident over lunch in the hallway with her friend.

Like I actually looked at the Principal, I was in his office, and I looked at him and asked, ‘Did you just ask me that?’ And he replied, ‘Excuse me?’ And I said, ‘Did you just asked me if I was even graduating this year?’ I said, ‘Of course I’m graduating. Did you not see my grades?’ Not that grades are all you should look at, but I’ve never like failed a course. He said I was giving him attitude. But I said, ‘Ok, I’m sorry, but you can’t just ask people that. You can’t assume things.’ I find that it’s not fair. You can’t just assume that because I’m not in uniform or that I’m spending some time in the hallway with my friends that I’m a bad kid or that I’m the kinda kid that fails. You don’t need to come to school in uniform. It doesn’t determine your education. We’re all just kids and trying to get somewhere in life and they just ask that, it’s so rude.⁵⁶

Though in this instance Beatriz recalls not being in uniform and spending some time in the hallway with her friend as reasons for why she was sent to the office and why this honour roll student is labeled as a bad kid, speaking Portuguese was also at play in her exchange with the teacher. Emotional throughout her re-telling, Beatriz begins to cry, and with what sounded,

⁵⁵Taken from 8 January 2016 field notes.

⁵⁶Transcript of interview with Beatriz on 23 March 2016.

looked, and felt to me like a bruised spirit, she continued to illustrate a common sentiment among Portuguese-speaking students at Westside.

I just find like they don't have hope for us because we go here and like it's not like a big school, you know, like no we don't go to [another school] (she names a well-resourced school close to Westside that has a reputation for academic excellence) or something, but you know we're not dumb. It just bothers me. There are people I don't even talk to who are like outstanding students and like what if they got asked that, you know? It's as if they don't even acknowledge the fact that we even go here, that our excellence doesn't mean anything to them, but it means so much to us.⁵⁷

Both Beatriz's and Rodrigo's experiences illustrate how language was a salient feature in why they were disciplined in class and at school. Additionally, however, students were linguistically marked when heard speaking Portuguese in school, and more often than not, assumed to be academically underachieving. Nearly all study participants referred by school personnel were academically or otherwise underachieving Portuguese students. I was referred this homogenous group of students by teachers who attended a faculty meeting where I clearly articulated my hope to engage a diversity of Portuguese-speaking youth in my study, namely newcomer and second-generation youth from Portugal and other Portuguese-speaking backgrounds, including Brazilian, Mozambican and other ancestries who both demonstrate higher and lower levels of academic achievement. Language rendered visible what for some was an invisible minority status and language played a significant role in constructing racial and ethnic identities and non-belonging in school. Given the context, it is not surprising that some students might respond differently to language disciplining.

Portuguese-speaking student adhering to language disciplining. The ideologies that produced Rodrigo's and Beatriz's experiences as well as those of many others inform another participant, Guilherme's, instinct to not speak Portuguese in the presence of teachers and other staff. Guilherme—a grade 12 student of Brazilian and German ancestry—immigrated to Toronto from Brazil four years earlier to join his mother, stepsister, and stepfather who had immigrated without him while he remained in Brazil with his grandparents. While observing Guilherme and other students in his construction

⁵⁷Transcript of interview with Beatriz on March 23, 2016.

class, I witnessed the following interaction that demonstrated a different response to language disciplining than Rodrigo and Beatriz revealed in the previous excerpts. The following account was taken from my field notes.

Guilherme's construction class had roughly two dozen students; nearly all were male, and many spoke Portuguese. The lofty space had a soaring 30-foot ceiling, with exhaust tubes rising into the rafters to remove sawdust and other dust debris from the several industrial-looking machines that occupied the space. Daylight streamed in from a bank of windows above the double garage doors that were used to bring in building materials and allowed for much needed air flow to cool the space during the heat of summer. A corner of the space was annexed to resemble a classroom, with eight large workstations with wooden tabletops that students clustered around either seated on tall stools or standing with those stools stored beneath the tabletop's edge. These workstations faced a white board located behind their teacher's desk, situated front and centre.

Clustered around a workstation, Guilherme's group had set up as they always did at the front of the class closest to the door used to enter and exit the classroom and next to where their teacher would sit and monitor their activity. Having previously designed a cottage on paper, the boys worked to construct a scaled model, paying careful attention to reduce the dimensions from the plans they had designed on paper.

Frustrated by several incorrect measurements made by his peers including Miguel—resulting in both wasted time and materials—Guilherme decided to intervene. Miguel—a popular grade 12 student, well-known for his bravado and the role he plays on Westside's winning soccer team—immigrated with his family from Portugal five years earlier. Having measured and cut the stud lengths himself, Guilherme confidently presented them to his group. Realizing that his studs also came up short, Miguel began teasing him in Portuguese, and in an accent to mimic Guilherme's Brazilian accent. "Você não fazê erros nenhuma, não senhor. O Guilherme vai nos mostrar como é que se faz." (You don't make any mistakes, no sir. Guilherme's going to show us how it's done). Frustrated with the fact that the studs were too short, and made worse by Miguel's taunts, Guilherme, with his back to the majority of the class and where the teacher usually sat, looked over his shoulder and quickly scanned the room before replying. I later found out that he scanned the room to see whether his teacher was within earshot be-

fore replying to Miguel saying, “Pare com isso. Deve haver um problema com a serra.” (Quit it. There must be a problem with the band saw). Immediately Miguel replied, “Ai, deve haver um problema, sim, por-que o Guilherme sabe muito bem como medir.” (Oh, right, it must be a problem with the band saw, because Guilherme knows how to measure very well). Instead of replying in Portuguese, Guilherme switched to English and said, “Oh yeah, cause the Portuguese think they know everything there is to know about construction.” Miguel’s taunts continued for a short while, but in his responses Guilherme never shifted back to Portuguese, which I found odd and decided to pursue.

As class ended, I asked Guilherme why he tended to respond to his Portuguese-speaking peers in English and in particular why he switched back to English during the above exchange with Miguel. Guilherme’s immediate response was to deny that he had switched languages. After reflecting a bit on my question, he said, “I don’t speak Portuguese in class because of my speech impediment, but also, teachers don’t like it when you speak Portuguese, they think you’re stupid or that you don’t know how to speak English. It’s better to speak English because teachers respect you more.” Guilherme first reflected on how others frequently comment on his accent, as both a Brazilian Portuguese speaker and someone with a speech impediment. Interestingly, Guilherme’s speech impediment was discernible whether speaking English or Portuguese. He also reflected, however, that it does not help him to remind the teacher—who may or may not be paying attention—that he speaks Portuguese because of the assumptions he perceives teachers to have about Portuguese-speaking students, who are always immediately assumed to be Portuguese. He added, “I’ve been told before by a teacher to not speak Portuguese in class; that I should be speaking in English. So, I guess I’m just doing what I’ve been told.” When I asked Guilherme to reflect on how he chooses not to speak Portuguese in class and how he wants to make sure others know he is Brazilian and not Portuguese, he paused and said,

Yeah, I think in class I’m trying to fit in as best I can. Portuguese students are always getting in trouble for whatever, so I don’t try to stand out. Outside of class I don’t really speak Portuguese with my other friends either, even my Brazilian friends. My girlfriend speaks Spanish, so we speak English with each other. I don’t like it, but it’s what I do to fit in.⁵⁸

⁵⁸Taken from April 5, 2016 field notes.

Language resisters versus language concealers: the need for critical language resistance. Race, class and language converge to inform how students perceive speaking Portuguese is disciplined at Westside and how the convergence informed Portuguese-speaking student subjectivity or Portuguese-ness. Students described their responses to language disciplining at school, and, in all cases, how their responses inform how Portuguese-ness and those to who it is ascribed are constructed as non-belonging in school. Language revealed Rodrigo's Portuguese-ness, to which the Educational Assistant connected class and ethnicity in her assumption that Rodrigo would be a construction worker when he grew up—a blue-collar job that many associate with men in Toronto's Portuguese community. His teacher marked him as non-belonging through language disciplining that removed him from the classroom and then highly surveilled his delinquent Portuguese-speaking subjectivity upon his return. Language played a role in Beatriz's encounter with school authority, who reproduced Portuguese-ness through notions of academic underachievement despite her honour roll standing. Guilherme, on the other hand, managed to avoid such consequences by distancing his subjectivity from Portuguese-ness. One way he did this was by asserting his Brazilian identity. Though proudly identifying as Brazilian, it is worth noting that when asked how he identified racially, Guilherme replied white, noting his mixed Brazilian and German ancestry and fair complexion. The second way he avoided the consequences of language disciplining was by not speaking Portuguese at school and concealing his Portuguese-speaking identity.

Language alone does not account for how language disciplining occurs at Westside, and in fact this disciplining is closely aligned with individual and collective constructions of student subjectivities and the raciolinguistic idea of racing language, where people's language use determines their racialized status. Consider Guilherme's two approaches to distancing himself from Portuguese-ness. By asserting his Brazilian identity, Guilherme in fact reveals to many his Portuguese-speaking identity, given that Brazil accounts for the world's largest concentration of Portuguese speakers. However, by being perceived as a concealer—a student who elects to speak English rather than Portuguese, Guilherme distances himself from his Portuguese-speaking identity and further yet from Portuguese-ness but not from his Brazilian identity; an ancestry that, unlike Portuguese, appears to have dissimilar effects on one's subjectivity. Though many students of Brazilian ancestry were Portuguese-

speaking, those I engaged with were not ascribed with Portuguese-ness once their Brazilian identity was made known.

I posit that these divergent responses to language disciplining result in struggles between language concealers and language resisters and contribute to a school environment that continues to disadvantage Portuguese-speaking students. Language concealers' responses to language disciplining (e.g., avoiding speaking Portuguese to "fit in" and gain teachers' respect), do nothing to challenge the conditions that reward those who adhere to language disciplining and punish those who defy these conditions. Language concealers, like Guilherme, resist being identified as Portuguese-speaking, and when this identity is revealed then distance themselves from Portuguese-ness through other identities such as a Brazilian subjectivity. Nevertheless, language concealers are not to blame for the conditions of language disciplining. Students themselves are not to be blamed for seeking some form of belonging or "fitting in" as they navigate a complex and consequential school culture. Language constructs their identities as belonging both in school and the nation, positioning language resisters as non-belonging.

On the other hand, to suggest that language concealing is an easy, much less available, option to language resisters misses the mark. Language concealing is neither available nor desirable to all Portuguese-speaking students, not to mention other non-English speaking students. As a result of other factors that reveal Portuguese-ness in school, language concealing (and particularly the advantages of doing so) present considerable costs, including social exclusion, emotional distress, not to mention a cost with regards to academic achievement and other school-based outcomes that researchers insist can result from engaging students' plurilingual capacities.⁵⁹ Such costs illustrate the isolating effects of restricting and disciplining non-English language use in schools. Language concealers' responses that adhere to language disciplining effectively buttress a complex system that perpetuates the non-belonging and marginalization of Portuguese-speaking students at Westside. That is not to say that language concealers are the problem, but they could play a role in the solution that is needed by developing a greater awareness

⁵⁹Fernando D. Rubio-Alcalá, José Luis Arco-Tirado, Francisco D. Fernández-Martín, Rocío López-Lechuga, Elvira Barrios and Victor Pavón-Vázquez, "A Systematic Review on Evidences Supporting Quality Indicators of Bilingual, Plurilingual and Multilingual Programs in Higher Education," *Educational Research Review* 27 (2019): 191-204.

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GUILHERME: No! They got, but I would be just like outside looking at them fighting. He talked back to everyone (the others laugh in agreement).

LUCAS: It's not about talking back, though. You should respect. The same way you're gonna get respect is the same way you should give respect. You shouldn't be talking down to someone and then expect them to be like, oh, I'm sorry, sir (Beatriz laughs as Lucas mocks Guilherme). It's about the way they talk to you, and about you. What is a good kid, anyway? I go to class, I'm passing, I'm hopefully getting honour roll. But, if you disrespect me I'm gonna disrespect you the same way. What is a good kid?

BEATRIZ: Yeah, what is a good kid?

GUILHERME: I find no point in fighting with the teacher because anything you say they'll just say you're wrong. There's no point fighting, say sorry and they think you're smart.

LUCAS: I don't kiss ass though. You see we get into more trouble because we stand up for ourselves, putting people in their place. Know where you stand. If you're gonna talk down to someone and act like you're Jesus, I'm gonna talk down to you the same way you talk down to me, saying no, you're not above anyone else. Even if you're a teacher, you're not above giving respect. I don't know what respect is, to be honest. I don't see it here.

BEATRIZ: Respect is in the way you speak, though—the way we're spoken to. It's the tone of their voice, gestures.

DAVID: A lot of people here are judgmental. They see you in the hall between classes, they hear you speaking Portuguese to your friends, they see you in the Resource Room, then they judge you as a bad kid.

GUILHERME: I just do whatever it takes to not get in trouble.

LUCAS: See, you're just a kiss ass, eh? (snickers)

GUILHERME: Yeah, I guess. (laughs nervously)

BEATRIZ: (to Lucas) He's a good kid, let him be.

ME: (to Beatriz) Are you not a good kid?

BEATRIZ: I'm a good kid but they don't think I'm a good kid. But they think Guilherme is a good kid. They just give up on some of us.⁶³

This exchange between Portuguese-speaking students reveals the critical language awareness that is fostered between language concealers and lan-

⁶³Transcript of group interview from 20 May 2016.

guage resisters. Students who defy language policies and practices that restrict their heritage language expression and construct their identities as non-belonging need to be seen and heard. Critical language awareness helps build a shared understanding among students, as “strategies of avoidance and redefinition leave race groups intact.”⁶⁴ To foster critical language awareness, language concealers, like Guilherme, must reflect on their investment in Whiteness, a Whiteness that is reproduced when they adhere to language disciplining that silences or degrades heritage language use in schools. Moreover, reflection is not enough. Guilherme admitted the unfairness of the language disciplining to which he adheres when he shared that resisting or contesting his teachers is a lose-win, and that although he does not like it, he still does it to fit in and reap the rewards of adherence. Elsewhere in my study, Guilherme reflected on how a Portuguese-speaking student in his class—who, like Rodrigo, resisted language disciplining—received an inferior grade to him despite Guilherme having done much less work than his Portuguese-speaking peer. The system that reproduces conditions of non-belonging for language resisters persists with or without language concealers. These students are not the source of the problem. However, responses by language concealers that do not recognize how avoiding speaking Portuguese reproduces conditions of non-belonging for language resisters likely account for much of the tension in the above exchange between Lucas and Guilherme and advances a conceiver’s academic achievement over another’s.

Limitations

Critical ethnography and its commitment to revealing unfair and unjust power relations and structures does not produce specific findings but unapologetically searches for specific data. Findings are based on participant narratives and observations that speak for themselves once invited, discovered and permitted. While this article forwards relatively unexplored phenomenon through participant narratives and observations regarding language and race among Portuguese-speaking students, the larger study also attended to issues of class, gender and other categories that simply could not be included in a single article. I trust, however, that this will not detract from the reality that participants’ salient and in some cases painful experiences reveal how

⁶⁴Alim, “Critical Language Awareness,” 8.

student subjectivities and raciolinguistic practices inform their schooling experiences and trajectories.

The overall ethnography did not include a comparative analysis between linguistic groups. If and how the experiences of language and other forms of disciplining impacted other non-English speaking students was beyond the scope of this study. Despite observing in Ms. Lombardi's class differences between how non-English-speaking students were disciplined and perceived, a comparative analysis would require speaking to students to explore the meanings students made of these experiences. My research also was not to critique or assess teachers and, therefore, though I may have observed other practices and come to understand certain perceptions of students, these were data I was not permitted to collect.

Participant recruitment for the study was challenging. The majority of participants (six of the ten) were recruited from the classes in which I was invited to observe and participate. Over half of those classes were designated non-university or non-college preparation level. Though several participants were honor roll students and succeeding academically, the realities and concerns regarding a history of streaming practices particularly within the Toronto boards of education may also have informed students' experiences.⁶⁵ In other words, that participants did not feel as if their success mattered to their teachers and administrators may have also been about their identities as non-university-level students in addition to their Portuguese-speaking identities.

Conclusion and implications

As an early influence on raciolinguistics and the field of critical language awareness, Fairclough critiqued previous approaches to language awareness. "Portraying standard English and other languages and varieties as differing in conditions of appropriateness is dressing up inequality as diversity: standard English is 'appropriate' in situations which carry social clout, while other varieties are [only] 'appropriate' at the margins."⁶⁶ Moreover, "attributing

⁶⁵For a historical account on streaming in Ontario, see Bruce Curtis, D. W. Livingstone and Harry Smaller, *Stacking the Deck: The Streaming of Working-Class Kids in Ontario Schools* (Toronto: Our Schools Ourselves Education Foundation, 1992).

⁶⁶Fairclough, *Critical*, 15.

the stigmatization of varieties to individual prejudice papers over the systemic, socially legitimized stigmatization of varieties.”⁶⁷

This study does not present a metanarrative of the experiences of Portuguese-speaking students in Toronto schools. The data presented are reflective of students at Westside and focus particularly on the experiences and perceptions of participants in this study and others in their classes. These students offer, however, another perspective to the overwhelmingly class-based analysis that explains Portuguese-speaking student academic underachievement. It revisits scholarly claims⁶⁸ of the racialized experience of Portuguese students in Toronto and that language informs experiences of racialization for non-Black minorities.⁶⁹ It also complexifies the school experiences of Portuguese-speaking students and behooves us to consider aspects of identity and language in schools that have remained relatively unexplored. In the case of Portuguese-speaking students, languaging-race highlights language’s central role in the construction, maintenance, and transformation of racial and ethnic identities. My intention is to neither vilify the language concealer, nor to blame students like Guilherme for tending to one’s material interests. Ultimately, Guilherme’s actions are shaped by Canadian structures of citizenship and belonging that move him and many of his peers to respond to language disciplining in one way or another that (re)produce language practices of conditional inclusion in schools. Instead, my aim in this paper is to reveal conditions that in part shape educational trajectories for Portuguese-speaking students and to assert that a pedagogical approach that builds critical awareness of how identity and language inform their educational experiences is a necessary step forward.

The study’s implications on school administrators include that they must encouraged and empowered teachers to engage the language skills of their students and those communities within which they teach to foster a greater sense of belonging. Additionally, however, educators must actively disrupt White ways of speaking in school exposing the larger sociopolitical structures and ideologies that delegitimize the linguistic practices of language-minoritized students who are historically and contemporarily constructed as

⁶⁷Fairclough, *Critical*, 15.

⁶⁸Aguiar, “Whiteness”; Januário, “Portuguese-Canadian Students”; Nunes, “Current Perspectives”; Nunes, Ari, VerCetty and Branco, “Contested Integration.”

⁶⁹Leonardo, “The Race.”

underachieving “bad kids.” In this way educators can harness the body of knowledge of their students (including language) to generate discussion and reflection.

Links should constantly be made between work on the development of language awareness and the language practices of the learner. This practice must be ‘purposeful’. That is, it must be tied to the learners’s real wishes and needs to communicate with specific real people, because this is the only way for the learner to experience authentically the risks and potential benefits of particular decisions. When critical awareness is linked to such decisions, it broadens their scope to include decisions about whether to flout sociolinguistic conventions or to follow them, whether to conform or not conform.⁷⁰

Met with pedagogy and curriculum that affirm and collectively critique dominant forms of marginalization based on identity and language, would certain students’ need to resist feel so imperative?

Raising critical language awareness must occur for all students and not merely those I describe as language resisters. Resistance comes in many forms, including silence, disengagement, truancy and dropout. Greater curiosity among teachers and administrators about the experiences that inform certain forms of resistance (e.g., language) is essential to increase student engagement and restore faith in students that their teachers, administrators, and other school personnel believe in them and care about their success. Critical language pedagogy should filter throughout schools, beyond the English classroom, to reshape the speech economics and hierarchies in multilingual schools with large Portuguese-speaking populations in Toronto. This presents a win for all students, including language concealers.

Critical language awareness in education emphasizes *critique* of whether, why, when and how one language (variety) is deemed appropriate over another. The benefits of learning standard English are certain to offer some students opportunities they might not otherwise have. However, developing pedagogical approaches that include critical views on how rules of appropriateness related to language might be flouted and challenged balances one’s perception of being unwelcome because of one’s identity and language. In other words, making space for and inviting the Portuguese language and thus Portuguese-speaking students into Westside and its classrooms without negative consequence is necessary, but raising awareness of why Portuguese

⁷⁰Fairclough, *Critical*, 16.

may otherwise be unwelcome is critical. Ultimately, this study made space for participants to reflect on how their identities and language practices informed their experiences, thus raising their awareness of language disciplining and discrimination.

The use of the category Portuguese-speaking in instruments used to collect student demographic information might be reconsidered given that many participants and other students at this research site reported that this eligibility criteria left them assuming the study was recruiting someone other than them. As a result—in addition to interrogating common assumptions that Portuguese-speaking means Portuguese—what we think we know about Portuguese-speaking students in Toronto may not accurately reflect the data desired. Adding demographic questions to specify ethnicity to these data collection instruments may offer a more nuanced understanding of Portuguese-speaking students' educational experiences and trajectories. Very often but not always, students of Portuguese ancestry are subsumed under the racial category Caucasian or White. Given this confusion, future study on the educational experiences and trajectories of non-Portuguese Portuguese-speaking youth (e.g., Brazilian and Angolan) compared to Portuguese youth will be important to understand if and how these experiences differ.

Future research in Portuguese studies in Toronto, Canada and elsewhere with large Portuguese diasporas ought to consider and interrogate how institutional settings (e.g., schools, the courts, policing, healthcare, workplaces) may reproduce dominant depictions of Portuguese-ness in relation to race and ethnicity through raciolinguistic frameworks among others. Finally, specific to the Toronto context, comparative research concerning non-English language use and subjectivities in schools should consider Portuguese students given the persistently higher rates of academic underachievement among Portuguese-speaking students in Toronto.

Tutoring and Mentoring for the Educational Success of Portuguese-Canadians and Latin-Canadians Through Community-Based Lived Experience ¹

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Introduction

Canadians of Portuguese and Latin-American² (Spanish speaking) descent collectively represent approximately 3% of Canada's population (482,610 and 621,830).³ Yet, over the past 50 years, Portuguese-Canadian and Latin-Canadian⁴ youth in Toronto have consistently displayed serious lags in academic performance, higher rates of dropping out, and lower rates of entrance into post-secondary education.⁵ This has resulted in an ongoing lack

¹I would like to thank Fernando Nunes for his suggestions during the early stages of this research and his comments on the initial drafts of this manuscript. The anonymous reviewers also provided very helpful comments that aided in bringing this work to fruition. It is imperative to recognize that this research could not have been completed without the collaboration and assistance of Marcie Ponte, the Executive Director of Working Women Community Centre, and her outstanding staff. Ivana and Martin Elbl made both the guest editing and completion of this article seem effortless and a true labour of love.

²The Latin American totals do not include Brazilians, who are speakers of Portuguese.

³Statistics Canada, *2016 National Household Survey: Data Tables* (Catalogue number: 99-1010-X2011028). Last updated 2016-01-07. <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/dt-td/Rp-eng.cfm?TABID=2&Lang=E&APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=1235625&GK=0&GRP=1&PID=110212&PRID=10&PTYPE=109445&S=0&SHOWALL=0&SUB=0&Temporal=2016&THEME=118&VID=0&VNAMEE=&VNAMEF=&DI=0&D2=0&D3=0&D4=0&D5=0&D6=0> (accessed 4 October 2020).

⁴In this article Latin-Canadian will be used to refer to Spanish speaking Canadians of Latin American decent to reflect some of the ideas noted in the American literature. See Linda Martin Alcoff, "Latino vs Hispanic: The Politics of Ethnic Names," *Philosophy & Social Criticism* 31 (4) (2005): 395-407.

⁵Grace Anderson and David Higgs, *A Future to Inherit: The Portuguese Communities of Canada* (Canada: McClelland and Stewart, 1976); Robert Brown, Lisa Newton and George Tam, *The Toronto District School Board's Student Group Overviews: Aboriginal Heritage, Afghan,*



of inclusion of the communities to which these youth belong in the full range of economic and social strata of Canadian society.⁶ Furthermore, while both the Toronto District School Board and Toronto Catholic District School Board have initiated remedial programs aimed at improving the outcomes of visible minority and Indigenous youth, virtually no initiatives exist which specifically assist these two groups. One exception to this is the Working Women Community Centre in Toronto (WWCC), a social services agency that, since its founding in 1974, has served the settlement and integration needs of immigrant families in west-end Toronto, with a focus on Portuguese- and Spanish-speaking women and their families. The WWCC offers four programs for families and students from preschool through to post-secondary education, which are geared towards improving educational outcomes for students from these communities. As this work will illustrate, these programs are based on an ecological model of tutoring/mentoring stu-

Portuguese-speaking, Somali-speaking, and Spanish-Speaking Students (Toronto: Toronto District School Board Research Report No. 14/15-31, 2015); Domingos Marques and João Medeiros, *Portuguese Immigrants: 25 Years in Canada* (Toronto: West End Y.M.C.A., 1980); Winona Giles, *Portuguese Women in Toronto: Gender, Immigration, and Nationalism* (Toronto: University of Toronto Press, 2002); Fernando Matas and John Valentine, *Selected Ethnic Profiles on Educational Attainment. Strategic Research and Analysis* (Multiculturalism Program, Department of Canadian Heritage, 2000); Fernando Nunes, "Portuguese-Canadian Youth and their Academic Underachievement: A Literature Review," *Portuguese Studies Review* 11 (2) (2004): 41-87; Fernando Nunes, *Portuguese-Canadians from Sea to Sea: A National Needs Assessment* (Toronto: Portuguese-Canadian National Congress, 1998); Amie Presley and Robert Brown, *Portuguese-Speaking Students in the TDSB: An Overview* (Toronto: TDSB Research and Information Services 11/12-01, 2011).

⁶Colin Lindsay, *Profiles of Ethnic Communities in Canada The Latin American Community* (Ottawa: Social and Aboriginal Statistics Division, 2001); Fernando Nunes *Marginalization, Social Reproduction and Academic Underachievement: The Case of the Portuguese Community in Canada.*, in Guida de Abreu, Tony Cline and Hannah Lambert, eds., *The Education of Portuguese Children in Britain: Insights from the Research and Practice in England and Overseas* (Portugal: Ministry of Education, 2004), 167-210; Fernando Nunes, Esra Ari, Quentin VerCetty and Benjamin Branco, "Contested Integration: Class, Race and Identity of Second and Third-Generation Minority Youth. Through the Prism of Critical Pedagogy," in Soheila Pashang, Nazilla Khanlou and Jennifer Clarke, eds., *Today's Youth and Mental Health: Hope, Power and Resilience* (Berlin: Springer, 2018); Daniel Schugurensky and Jorge Giniñewicz, *Ruptures, Continuities and Re-learning: The Political Participation of Latin Americans in Canada* (Toronto: Transformative Learning Centre, 2006); Daniel Schugurensky, Daniela Mantilla and José Francisco Serrano, eds., *Four in Ten: Spanish-Speaking Youth and Early School Leaving in Toronto* (Toronto: Latin American Research Education and Development Network (LARED) and the Transformative Learning Centre, Ontario Institute for Studies in Education [OISE] of the University of Toronto).

dents and parents, placing community-building at the centre of their approach.

In order to contextualize the research, this article will begin with a discussion of the literature on underachievement in the Portuguese-Canadian and Latin-Canadian communities, recommendations, detailing the Working Women programs, providing definitions of tutoring and mentoring, and the related literature. In order to explain the findings, a framework is discussed that includes community building based on Bronfenbrenner's ecological theory and Turner's notion of lived experience, as well as the main research questions. This section contextualizes the research, literature, and the theoretical perspective that was selected based on the research to explain community building through lived experience of these tutors and their work mentoring students and families. Then the methods, analysis and discussion of findings, limitations, conclusions, and implications are considered.

Underachievement in the Portuguese-Canadian and Latin-Canadian communities

Past studies on Portuguese-Canadian youth and education have highlighted their academic underachievement and marginalization within Canadian society, displaying some of the lowest levels of educational achievement of any minority community, which at times have approached those in the Indigenous communities.⁷ Historically, Portuguese-Canadians have been among the groups with the highest proportions of individuals who have only a primary education, with only 6% to 10% having completed a university degree.⁸ Furthermore, over the last 30 years, Luso-Canadian youth have reported that they are less likely to attend university, lack confidence in their ability to succeed in post-secondary education, work the longest hours in part-time

⁷Fernando Nunes, "Portuguese-Canadians and Academic Underachievement: A Community-based, Participatory Research Project," Unpublished Doctoral Dissertation (Ontario Institute for Studies in Education, University of Toronto, 1999); Nunes, *Portuguese-Canadians from Sea to Sea*; Fernando Nunes, "Integration or Return? Towards an Effective Emigration Policy and Practice for a Neglected Diaspora," in Vlado Sakic, Howard Duncan and Marin Sopta, eds., *Immigrants and Homeland* (Zagreb: Institute of Social Sciences IVO PILAR, 2003); Nunes, "Marginalization, Social Reproduction"; Presley and Brown, "Portuguese-Speaking Students."

⁸Matas and Valentine, *Selected Ethnic Profiles*; Michael Ornstein, *Ethno-Racial Inequality in Toronto: An Analysis of the 1996 Census* (Toronto: Access and Equality Unit, City of Toronto).

positions, and spend the fewest hours per week on homework.⁹ In addition, the 1994 *Royal Commission on Learning* highlights the Portuguese- Canadian community's dropout rate, and Ornstein's work from 2000 notes that Portuguese youth aged 20-24 had the second-highest dropout rate of any minority group, describing Luso-Canadians as one of the groups "of most concern" with respect to education.¹⁰ Furthermore, a 2005 report on intergenerational mobility amongst the children of immigrants indicated that while Portuguese-Canadian sons and daughters had nearly doubled their education levels from those of their fathers, their incomes had failed to improve from those of their predecessors.¹¹ The income levels for Canadian-born Portuguese children were shown to be similar to recent visible-minority immigrant groups with similarly low education levels, such as the Central Americans, Jamaicans, and Grenadians. This illustrates the community's lack of upward social mobility, which is also noted by Fonseca in her study of Portuguese-Canadian men who favoured work over schooling.¹²

Educational underachievement in Latina/o North American communities is also comparable to the Luso-Canadian community. Research on the Spanish-speaking community in Canada is ongoing and points to serious lags in academic performance, underachievement, higher rates of dropping out, and lower rates of entrance into post-secondary education.¹³ Overall, the literature on Portuguese-Canadian and Latin-Canadian youth related to

⁹Cheng and Yau, *The 1997*; Cheng, Yau and Ziegler, *The 1991*; Sylvia Larter, Maisy Cheng, Sarah Capps and Marianne Lee, *Post-Secondary Plans of Grade Eight Students and Related Variables (Report # 165)* (Toronto: The Board of Education for the City of Toronto, Research Department, 1982); Edite Noivo, *Inside Ethnic Families: Three Generations of Portuguese-Canadians* (Montreal: McGill-Queen's University Press, 1997); Michael Ornstein, *Ethno-Racial Groups in Montreal and Vancouver, 1971-2001: A Demographic and Socio Economic Profile* (Toronto: York University, Institute for Social Research, 2006); Ornstein, *Ethno-Racial Groups in Toronto*; Henrique Santos, "Portuguese-Canadians and Their Academic Underachievement in High School in British Columbia: The Case of an Invisible Minority," Unpublished Master's Dissertation (Vancouver, B.C., Simon Fraser University, 2006).

¹⁰Royal Commission on Learning, *For the Love of Learning: Report of the Royal Commission on Learning for Ontario* (short version) (Toronto: Queen's Printer, 1994); Ornstein, *Ethno-Racial Inequality in the City of Toronto*, 124-125.

¹¹Abdurrahman Aydemir, Wen-Hao Chen and Miles Corak, *Intergenerational Earnings Mobility Among the Children of Immigrants* (Catalogue no. IIF0019MIE — No. 267) (Ottawa: Statistics Canada, Analytical Studies Branch, Family and Labour Studies Division, 2005).

¹²Susana Fonseca, "Losing Touch: The Early School Leaving of Four Young Portuguese-Canadian Men," Master's Thesis (Faculty of Education, Queen's University, 2010).

education focuses on their underachievement. The literature points out why they are not considering or pursuing post-secondary education. This is especially evident in the cases of Portuguese-Canadian male youth, favouring getting a job over furthering their education, which is not usually the case for Portuguese-Canadian women.¹⁴

Recommendations from the underachievement literature

The literature on the underachievement of both Portuguese- and Latin-Canadian communities includes recommendations which aim to help reverse the educational underachievement of their students. Recommendations for Portuguese-Canadians are aimed at both a primary and secondary level and avoiding the wholesale “social reproduction” of the outcomes of the first generation (i.e., not finishing secondary school and not entering post-secondary education), by the second and third generations.¹⁵ These recommendations include changing discriminatory school practices, such as streaming, and halting the labeling of Portuguese-Canadian students as being “learning disabled,” as well as offering more teacher resources and training. They also call for more support for parents, such as a bilingual Portuguese/English guide for interviews with teachers and workshops for parents, tutoring and mentoring programs, as well as programs that encourage the transition to university were also recommended for Portuguese-Canadian students.¹⁶

¹³Alcoff, “Latino vs Hispanic”; Robert Brown. *The Grade 9 Cohort of 2004* (Toronto District School Board Research Report, Organizational Development Department, Research and Information Services, 2010); Robert Brown, *An Examination of TDSB Post-Secondary Patterns 17 Year Old Students, 2007* (Toronto District School Board Research Report, Organizational Development Department, Research and Information Services, 2009); Robert Brown and Erhan Sinay, *2006 Student Census: Linking Demographic Data with Student Achievement* (Toronto: Toronto District School Board, 2008).

¹⁴Fernando Nunes, “Gender Differences and Commonalities in the Integration of Luso-Canadians,” in Manuela Marujo, Aida Baptista and Rosana Barbosa, *The Voice and Choice of Portuguese Immigrant Women* (Toronto: University of Toronto, Canada, Department of Spanish and Portuguese, 2005), 149-155.

¹⁵Fernando Nunes, “Striking a Balance in Canada’s Diversity,” *Canadian Diversity* 6 (2), (2008): 121-125; Fernando Nunes, “Marginalization, Social Reproduction.”

¹⁶Ilda Januario, Manuela Marujo and Fernando Nunes, *The Portuguese-Canadian Coalition for Better Education: A Decade of Community Activism in Education (1995-2005)* (Portuguese-Canadian Coalition for Better Education, 2005); Fernando Nunes, “Portuguese-Canadian Youth and their Academic Underachievement: A Literature Review,” *Portuguese*

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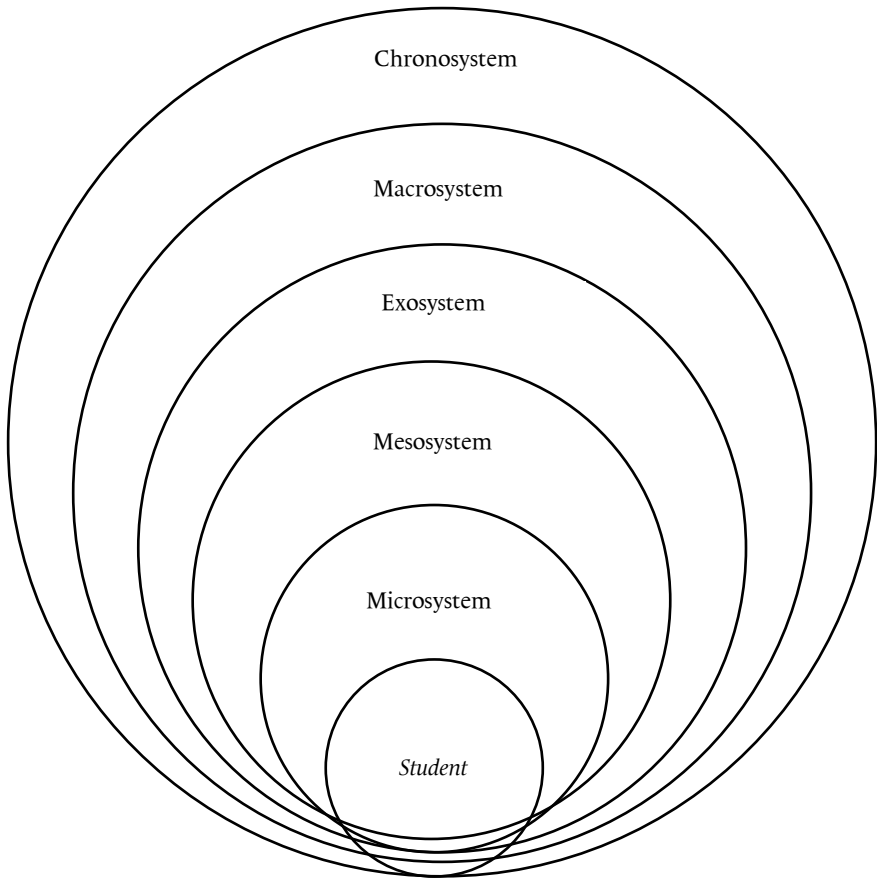


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Diagram 2 Bronfenbrenner's Ecological Theory
(design by R. A. Kenedy)



fluence the development by elements, with the *Microsystem* involving "... activities, roles, and interpersonal relations experienced ... in settings that includes the immediate family, neighborhood, and school."⁷⁶ The microsystem, through mentoring, education, and transitioning children and families, connects individual components such as mentors, who become conduits to parents. Tutoring and mentoring settings such as school and other programs

⁷⁶ Bronfenbrenner, *The Ecology of Human Development*, 22.

help students by providing a pastoral educational environment that is more informal, bringing together children/students, parents, Working Women staff, and others who work toward supporting students outside the classroom.

The next layer is the *Mesosystem*, which connects individual components of the microsystem as an intermediate affiliation such as teacher to parents. It is “the interrelations among two or more settings in which the developing person actively participates (such as, for a child, the relations among home, school, and neighborhood peer group; for an adult, among family, work, and social life).”⁷⁷ Tutors may also act as facilitators and interpreters of the *mesosystem* in terms of facilitating the understanding between parents and schools. These tutors can facilitate the knowledge of parents, so they have a better understanding of how to interact with the school system and help their children. Tutors also help advise parents about Working Women workshops and programs that assists them at an exosystem level to understand the school boards.

The *Exosystem* is the third layer, which may not directly impact the child, but it interacts with components of the microsystem to indirectly affect the child. “Examples of an exosystem in the case of a young child might include the parent’s place of work, a school class attended by an older sibling, the parents’ network of friends, the activities of the local school board, and so on.”⁷⁸ Often, Working Women workshops include interacting with school board trustees and other representatives of the *exosystem level*. In this way, tutors and mentors are educational conduits who provide a pastoral educational experience.

The fourth layer is the *Macrosystem*, which contains overarching beliefs, ideals, and values that impact “lower-order systems (micro-, meso-, and exo-) ...at the level of the subculture or the culture as a whole, along with any belief systems or ideology underlying such consistencies.”⁷⁹ Tutors and Working Women staff also inform the parents of the *macrosystem* and the stigma connected to beliefs at various levels of the school system. Through Working Women programs parents are trained to confront these stigmas and get the

⁷⁷Bronfenbrenner, *The Ecology of Human Development*, 25.

⁷⁸Bronfenbrenner, *The Ecology of Human Development*, 25.

⁷⁹Bronfenbrenner, *The Ecology of Human Development*, 26.

help they need from teachers, principals, board superintendents, and trustees.

The final layer is the *Chronosystem*, which encompasses the events over time in a child's life, both externally and internally, that affect the child significantly such as the online world.⁸⁰ As part of the *chronosystem*, a child's life is affected both externally and internally, for example by the online world. Tutors recognize the importance of the online world in students' lives and use online tools and communication to help them with their homework. Overall, these layers influence and guide the development of children and their families and are community building blocks that reinforce the adage that "it takes a village to raise a child."

Working Women takes a community-oriented approach to understanding the lived experience of families and children through offering programs from the early years to post-secondary transitions. As an educational and community hub, they embrace the idea that it "takes a village to raise a child" through helping new Canadian families by recognizing their specific lived experience of stigma, discrimination, financial hardship, and other challenges they face as new Canadians to help them ensure educational success. In many ways, Working Women are a community bridge between parents, schools, board trustees, and others who are able to advocate, assist, and train parents and students to advocate for themselves in the educational community.

It is all the layers, and especially the microsystem and mesosystem, that influences the child through socialization and education. Bronfenbrenner notes that the "critical term in the definition of the microsystem is *experienced*... [and] hav[ing] meaning to the person in a given situation."⁸¹ He relates these microsystem experiences to Kurt Lewin's "life space" in terms of how meaning and the definition of the situation are based on how "the environment is perceived by the human beings who interact within and with it."⁸² The connection of what people experience, their definition of the situation, and life space are similar to Turner's notion of lived experience. Ac-

⁸⁰Fernando Nunes, "Critical and Intersectional Perspectives on Immigrant Youth Cultural Identity," *International Journal of Mental Health and Addiction* DOI.org/10.1007/s11469-019-00093-2.; Victoria Payne, *It Takes a Village to Raise a Child: How Bronfenbrenner's Microsystem Promotes Youth Resilience in Black Communities* (Howard University, 2009).

⁸¹Bronfenbrenner, *The Ecology of Human Development*, 22-23.

⁸²Bronfenbrenner, *The Ecology of Human Development*, 23.

ording to Turner, “lived experience is thought, desire, words, and images, that ... is the primary reality.”⁸³ Lived experience is about how we characterize experiences in our own consciousness and how “people experience themselves, their own lives, and their culture.”⁸⁴ It is the understanding of lived realities and life situations, past and present in terms of what someone has experienced in their lives (e.g., racism, discrimination, stigma, educational barriers, economic issues, and other challenges) and their present lived experience. This lived experience may be relational in terms of being, interpreting, and doing.⁸⁵ Garfat *et al.* note that “history of previous life experiences which may include relationships of pain, a history of oppression, positive encounters with adults, feelings of worthiness or unworthiness, experiences of racism, and the list could go on forever.”⁸⁶

This framework highlights the micro and macrosystems and how these relate to life experience and community-building through understanding the lived experience of tutors who mentor students and their parents. The focus will be on Working Women strategies that are informed by the lived experience and lived reality of students and their families who are struggling to access education. They engage with them at a microsystem and mesosystem level to access education and ensure that their strategies reflect the lived experience and needs of students and their families. The volunteer tutors and mentors as well as the site supervisors are typically those who have graduated from *On Your Mark* and have often experienced barriers in the education system. The program model is informed and strengthened by students and ideas for making education more relevant, engaging, and accessible to students and their families.⁸⁷

A holistic approach to tutoring and mentoring highlights the idea that “it takes a village to raise a child” in terms of considering a community-based approach to mentoring the whole “child” or student that promotes community-building.⁸⁸ The literature on tutoring and mentoring in the context of “it takes a village to raise a child” suggests a link between tutoring

⁸³Turner and Brunner *The Anthropology of Experience*: 5.

⁸⁴Turner and Brunner *The Anthropology of Experience*: 6.

⁸⁵Thom Garfat, James Freeman, Kiaras Gharabaghi and Leon Fulcher, “Characteristics of a Relational Child and Youth Care Approach Revisited,” *Child and Youth Care Online* 236 (2018): 7-45.

⁸⁶Garfat, Freeman, Gharabaghi and Fulcher, “Characteristics of a Relational Child,” 25.

⁸⁷Working Women Community Centre Proposal.

and mentoring students that includes the mentoring of family members and having various community supports from the “ground up” as a community-building approach. This approach is based on the needs emanating from the community in terms of promoting equity through ensuring that students’ academic and related needs are considered. It encompasses the whole child as well as their parents in order to nurture them academically and as a whole student (e.g., confidence-building, validation, resilience, social support, self-esteem, social skills, and social connectedness), which includes mentoring family members such as parents.⁸⁹ This holistic community-based approach helps students and their parents in terms of challenging the stigma and biases in the educational system by providing community support through mentoring children, youth, and their families to overcome economic and social inequities, obstacles, as well as structural and systemic barriers.⁹⁰

OYM through the lens of ecological theory, community-building and lived experience framework

The community-building and lived experience framework is being applied to the data with tutors and their role in Working Women’s community-building and helping students and parents through the educational system as educational and community conduits. In this case, the tutors’ lived exper-

⁸⁸Since 2002 I have attended many pedagogically-based conferences such as the First-Year Experience and the Student Transition conferences where presentations that highlighted the theme “it takes a village to raise a child” related to mentoring, tutoring, matriculation, student transition, and other related transitions. Pairing this concept with Bronfenbrenner’s work helped me understand how this can be a ground up process often coming from the community that could promote equity, agency, and success among underrepresented groups of students. This can also fit in with life experience in terms of the community and understanding their viewpoint.

⁸⁹Charmaine Anne Barber, “‘It Takes a Village to Raise a Child’: Pastoral Care for Māori and Pasifika Secondary School Students,” PhD thesis in Education and Population Health (The University of Auckland, 2016); Juanita Johnson-Bailey and Ronald Cervero, “Mentoring in Black and White: The Intricacies of Cross-cultural Mentoring,” *Mentoring & Tutoring: Partnership in Learning* 12 (1) (2004): 7-21; Payne, *It Takes a Village*.”

⁹⁰Peter Knight and Paul Trowler, “It Takes a Village to Raise a Child: Mentoring and the Socialization of New Entrants to the Academic Professions,” *Mentoring & Tutoring* 7 (1) (1999): 23-34; Elaine Mohamed, “It Takes a Whole Village to Raise a Child,” *Peabody Journal of Education* 71 (1) (1996): 57-63; Robert Palmer and Marybeth Gasman, “It Takes a Village to Raise a Child: The Role of Social Capital in Promoting Academic Success for African American Men at a Black College,” *Journal of College Student Development* 49 (1) (2008): 52-70.

ience as mentors and educational conduits is explored along with their role of empowering students and parents in order to promote student success and navigate the educational system. The application of the community-based lived experience of OYM tutors who have mentored Portuguese-Canadian and Latin-Canadian primary and secondary students and their parents will be the focal point of the following research questions:

- 1) What is the tutors' lived experience and how does it impact their tutoring and mentoring of students through pastoral education?
- 2) How does Working Women build community through tutoring and mentoring students and their parents in order to create community engagement?
- 3) What are the OYM tutor's perceived impacts through tutoring and mentoring in terms of helping students and their parents navigate the education system?
- 4) What are the OYM tutors' viewpoints regarding their work of promoting educational success through combining tutoring and mentoring for students and parents?

These questions helped to guide the research and will be explored as a way to further fill the gap regarding the mentoring of Portuguese-Canadian and Latin-Canadian students and parents. The existing literature will be compared to the interview data. Much of the work in this article focuses on the tutors' lived experience as community-builders who promote educational success in both the Portuguese-Canadian and Latin-Canadian communities.

This research highlights the OYM focus group and interviews with the tutors in their roles as mentors and role models to the primary and secondary students. Future publications will focus on the data from OYM students, parents, as well as HIPPY and Latinx PAP parents interviewed for this overall research project.

Methodology

The data used in this article is based on focus groups and interviews with 22 tutors/mentors (Females $n=17$, Males $n=5$) that is part of a larger study exploring tutoring, mentorship, parental involvement/training, and the stu-

dents' educational experiences in the OYM, HIPPY, and LATINX Working Women programs.⁹¹ The entire study sample from the larger study included a total of 79 participants (Females $n=52$, Males $n=26$, Non-binary = 1; 19 focus groups with 73 participants and 6 interviews). In the overall study, 22 tutors/mentors (Females $n=17$, Males $n=5$; 5 focus groups and 4 interviews); 3 Working Women staff/organizers (Females $n=3$, 1 focus group); 26 OYM students (Females $n=12$, Males $n=13$, Non-binary $n=1$; 6 focus groups); 10 OYM parents (Females $n=6$, Males $n=4$; 3 focus groups and 2 interviews); 10 Parents Ambassadors (Females $n=10$; 3 focus groups) and 8 HIPPY parents (Females $n=8$; 3 focus groups) were part of focus groups or were interviewed.⁹²

Sampling. Various non-random sampling techniques were used to select tutors/mentors, including judgmental-purposive, availability, and snowball sampling.⁹³ Judgmental-purposive sampling was a valuable sampling technique guiding the selection of initial participants in the study based on participating in various Working Women programs. This was done mainly by learning through Working Women staff who is in the programs and would be the most appropriate to interview based on the research goals of learning more about their experiences and the perceived effectiveness of these programs. Based on this information, I selected those who participated in these programs and would be interested in sharing their experiences through focus groups or interviews. Availability sampling was also beneficial in cases where subjects were readily available and willing to participate in the study with advanced notice or even on short notice. Working Women staff were very helpful when coordinating the availability of focus group and interview participants. Snowball sampling was helpful following interviews and focus groups when participants were asked to identify contacts through their informal networks, such as others they knew who participated in the various programs.

Focus Groups and Interviews. Both the focus groups and interviews were based on a semi-structured focus group and interview schedules, which in-

⁹¹Kristin Esterberg, *Qualitative Methods in Social Research* (USA: McGraw-Hill Higher Education, 2002).

⁹²This broader view of the entire study helps to contextualize the scope of the research on tutoring and mentoring as well as the future publications on the entire study.

⁹³Earl Babbie and Lucia Benaquisto, *Fundamentals of Social Research* (Scarborough: Thomson Nelson, 2002).

cluded open-ended items that were also used during the focus groups in order to facilitate a more dynamic group interviewing process. The focus group and interview schedule included questions such as asking tutors about their tutoring and mentoring experiences; past tutoring and mentoring experiences; how they found out about OYM; why they decided to volunteer for OYM; importance of OYM; highlights while volunteering as tutors; importance of OYM for the community; discussing their educational experiences; impact of OYM tutoring on students; their role as tutor and mentor; strengths and challenges of the OYM; skills students develop through OYM; how OYM builds community; and anything else they wanted to discuss; and other related follow up questions per the semi-structured schedule. Demographic questions included asking about their highest level of completed education, ethnicity, age, postal code, religion, where they and their parents/grandparents were born, and languages spoken at home. The focus groups and interviews were conducted by me, lasted about 30 to 90 minutes, and were recorded using a digital recorder. In some focus groups and individual interviews, translators were present to translate both questions asked and answers/responses in the focus group and interviews in both Spanish and Portuguese into English and English into Spanish and Portuguese. The focus group sizes ranged from 3 to 5 participants, with questions directed at all participants soliciting responses from some participants and encouraging concurrent exchanges between them. Some focus group questions were directed at all individual participants consecutively, with individual focus group participants answering specific questions such as demographics. In cases when there were translators, focus groups lasted as long as 90 minutes. Interviews usually included one to two participants in order to accommodate those with scheduling conflicts, some who showed up late, or others who were more comfortable doing an individual interview. The individual interviews and focus groups were conducted in the Working Women offices (both their Gladstone main office location close to Bloor and Dufferin as well as their Jane and Finch Offices) and at Bloor Collegiate in Toronto between March 2017 and May 2019.⁹⁴ Those who participated in the focus

⁹⁴The Working Women Gladstone office and Bloor Collegiate are both located close to Dufferin and Bloor in Toronto known as “Little Portugal.” The Working Women Jane/Finch office is in a high-density multicultural area of north Toronto also known as University Heights due to the location being close to York University. See Nick Aveling “Rebrand-

groups and interviews signed a consent form. Before starting the focus groups and interviews, all participants were asked if they had any questions about the consent form, the study, or other questions related to the research. Participants were informed that their names and personal data would be kept confidential. When all questions about the consent forms or study were answered, the focus group and interviews began.

Analysis of the data. Interviews and focus groups were fully transcribed in English, and the transcripts of the interviews were coded utilizing a thematic analysis and a multi-rater process developed by the principal researcher.⁹⁵ Common themes were coded separately by multiple raters (the principal researcher and the transcribers who received information and brief training through emails and phone calls). The transcribers/raters were primarily undergraduate students who had varying work experiences that included being past tutors/mentors or being connected to Working Women programs. Initially, transcribers/coders were asked to point out interesting categories, themes and identifying themes and sub-themes in terms of positive, negative, interesting, and other points they found to be unique or unexpected in the transcripts. Once trained and provided with clear instructions, the transcribers/raters were given full autonomy to select categories and themes.

The process of multi-rater agreement and reliability was much more informal based on a variation the principal researcher developed in prior research. The comparisons of themes were made mainly by the principal researcher as a result of consulting with the transcribers/raters in order to develop a consensus of convergence of themes and sub-themes. This process was based on discussing themes with the engaged members of the transcribing/rating team and consulting on any trends or other emerging ideas or points in the data. The process of rating and sifting out themes is collaborat-

ing Jane and Finch," *Toronto Star* (Thursday, 9 January 2009).

⁹⁵Kenedy, "Researching"; Robert Kenedy, *Fathers for Justice: The Rise of a New Social Movement in Canada as a Case Study of Collective Identity Formation* (Ann Arbor, Michigan: Caravan Books, 2004/5); Robert Kenedy, "Situational Identity and Liminal Diaspora from France to Montréal," in Robert Kenedy, Margaret Greenfield Jonathan Rollins and Patricia Gabriel, eds., *Diasporic Identities and Spaces Between* (Oxford: Inter-Disciplinary Press, 2012); Robert Kenedy and Fernando Nunes, "An Analysis of Civic Identity and Participation Among Portuguese Canadian Youth in Québec and Ontario," *Portuguese Studies Review* 20 (3): 101-141; Irving Seidman, *Interviewing as Qualitative Research* (New York: Teachers College Press, 1991).

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of mentioning that the boys were, at times, less motivated and tutors had to bring in sports such as soccer, basketball, and hockey during reading sessions and math. Books about sports were also discussed and used to promote literacy and numeracy (e.g., game scores, individual players' scoring or points, and related references to sports).

Overall, it could be argued that the tutors also mentor as pastoral educators who see themselves as community builders who challenge the stigmas in the educational system which in some cases *they* experienced when *they* were students. Working Women also provides educational and social capital¹⁴⁶ as well as a holistic approach to education.¹⁴⁷

Access, equity, and community-building are very important themes in the data. Working Women also helps students, parents, and families navigate through the educational system. In many ways, the tutors are community-builders in terms of volunteering their time to help students. The tutors' lived experience were clear in terms of the OYM program providing community-building and insuring equal access to education through tutoring and mentoring.

Limitations

This research is exploratory and ongoing with the possibility of completing more interviews and focus groups. As with most qualitative research, there are limitations regarding this methodology. In terms of analysis, a multi-rater process was used to select themes, sub-themes, and overall categories. While there was a high level of consensus regarding themes and categories between the principal researcher and the transcribers/raters, there are always subjective aspects of this process. Having that consensus still does not eliminate biases of the principal researcher and transcribers/raters. However, having this system set up along with the sifting out of themes enhanced the analysis through assisting the principal researcher with considering themes that could have been missed or the bias of only having the principal researcher complete the coding.

The sample size was limited due to the qualitative research and other related issues. There could have been self-selection bias in terms of tutors who

¹⁴⁶Moschetti, Plunkett, Efrat and Yomtov, "Peer Mentoring as Social Capital."

¹⁴⁷Barber, "It Takes a Village"; Johnson-Bailey and Cervero, "Mentoring in Black and White"; Mohamed, "It Takes a Whole"; Payne, "It Takes a Village."

were more satisfied and committed, opting to participate. However, with those who were asking for more training and additional contacts with other tutors, they were clearly not always satisfied with the program and thought it could be better. Still, tutors also understood that Working Women have limited resources, but are receptive to creative ways to improve their program. In addition, it is not clear if a saturation point was reached; this would be apparent only after collecting more data.

The non-random sampling techniques have been helpful in terms of using snowball and other sampling to increase the sample size. Using focus groups and in-depth interviews has provided valuable insights into Portuguese-Canadian and Latin-Canadian tutoring and mentoring, from the lived experience of tutors and mentors. Due to the small sample size and those focusing on mentoring and tutoring of Portuguese-Canadian and Latin-Canadian primary and secondary students living primarily in the Greater Toronto Area (GTA), the findings may only be applicable to the GTA and possibly other Canadian urban settings. The findings may not be applicable to others living in smaller Canadian communities, such as rural settings.

While the gender of the peer mentors and educators was noted throughout the study, there was not an emphasis on the gender of the peer mentors and educators. It should be noted that male tutors/mentors did discuss the situation of male students and female tutors/mentors did focus on their identity of being Portuguese-Canadians and experiences similar challenges. Overall, gender intersects with all the themes. For future work, it may be interesting to consider gender as an independent theme, as the literature does suggest that women more often volunteer to be mentors than men and often take a leadership role.

The effectiveness of the tutors/mentors will be discussed in future publications and reports when the interviews and focus group materials with students and parents are published. This study primarily focused on the experiences of the peer tutors/mentors based on ecological theory and lived experience influencing perceived impacts on Portuguese-Canadian and Latin-Canadian primary and secondary students.

Conclusion and implications

Future research could highlight the organizational aspects of facilitating successful tutoring and mentoring through pastoral education in

the Portuguese-Canadian and Latin-Canadian communities. The challenges and successes of mentoring and educational organizations in a multicultural environment also need to be considered, as well as the institutions that support and facilitate tutoring and mentoring. Future research could also examine the funding and policy challenges related to multicultural tutoring and mentoring, as well as ensuring that under-serviced communities receive more support and funding in order to facilitate educational success.

Examining the organizational aspects of mentoring may underscore the importance of funding these tutoring and mentoring programs in order to help students flourish. Often, funding is limited or non-existent to support or create not for profit tutoring and mentoring organizations. Having more financial and other support from multiple levels of government and educational institutions would definitely enhance these programs. While the vast majority of tutors and mentors are volunteers, more funding could offer modest payment to promote more extensive training and pay the tutors and mentors.

More research into the gender differences in tutoring and mentoring would also enhance the literature on post-secondary tutoring and mentoring and education. A study highlighting tutoring or mentoring styles, reasons for tutoring and mentoring, and whether male and female tutors or mentors have different goals could be considered in future research.

In-depth research is needed regarding the assumptions that have framed the foundation of the WWCC educational programming model and its efficacy. It is recommended, for example, that more research is necessary to understand why students participating in OYM did not improve their attendance records nor their math grades, despite having acquired collaboration skills.¹⁴⁸ A separate study is needed to get at the reasons for this mixed record.

Future work can also inform the understandings of the tutoring/mentoring process, address critical issues such as educational programming for at-risk students, community development, social inclusion policy and practice, as well as provide a better understanding of the place and value of social capital. This work may also be helpful in terms of theories dealing with youth

¹⁴⁸Analytical Findings, *On Your Mark* Program.

tutoring, mentoring, minority underachievement, anti-racism, immigrant students, and settlement.

The data provided an interesting snapshot of tutoring and mentoring and may suggest directions for online surveys through adapting the questions used in the focus-group and interview schedules. A more extensive future online survey of tutoring and mentoring would help with metrics to make sense of what is working and the challenges within the program. There could be a comparison of traditional in-person mentoring and online OYM programing now taking place due to COVID-19. A survey will be more far-reaching in terms of sampling and offer anonymity. This would include surveying tutors, students, parents, and staff in all Working Women educational programs. An online questionnaire would use augmented questions from this research along with questions that consider the influence of mentoring that occurred during tutoring sessions and the importance of mentoring students. This may help determine if they were more successful by helping to increase mentees' confidence, supporting them, and discussing future plans for success to promote learning. Pastoral education would also be a key focus along with investigating how tutors volunteer their time and their commitment to giving back to the community. In addition, due to COVID-19, future research could assess the effectiveness of online remote tutoring and mentoring, and other programs.

Finally, Working Women have offered their services to various communities but are waiting for funding in order to make this possible. Future research also needs to be completed assessing how effective Working Women programs are when applied to other ethnic groups or neighbourhoods inside or outside of Toronto or Ontario. This comparison between the data already collected and an evaluation of the effectiveness of these programs in other populations could provide contrasting research regarding the consistency and efficiency of the programs.

BOOK REVIEWS



**A History of the Portuguese – Review of Malyn Newitt,
*Emigration and the Sea: An Alternative History of
Portugal and the Portuguese***

London: Hurst & Co., 2015. Pp. xiii, 295. Paperback CDN \$30.95 (ISBN-10:
9780190263935; ISBN-13: 978-0190263935)

EMIGRATION HAS BEEN a constant feature of the history of the Portuguese nation; so much so that many of the pre-eminent Portuguese poets and writers have, themselves, been emigrants: Camões wandered, for a long time, through Morocco, the Far East, Africa and India; Eça de Queiroz served for years as a diplomat in Cuba, England and Paris; Fernando Pessoa emigrated as a child to South Africa; and José Saramago moved in his later life to the Canary Islands. Indeed, the Portuguese nation has experienced such consistently high outmigration rates, relative to its population, that this has resulted in repeated fears across its history that the nation was being depopulated.¹ In recent years, Portugal has continued to have the highest outmigration flows, relative to its population, of any nation in the European Union.² Yet, in many books dealing with Portuguese history, the story of emigration has been relegated to a secondary status, treated as an outcome of the various political and economic forces and events that have shaped the Portuguese nation across the centuries.

In *Emigration and the Sea: An Alternative History of Portugal and the Portuguese*, the historian Malyn Newitt attempts to rectify this incongruity, by

¹Malyn Newitt, *Emigration and the Sea: An Alternative History of Portugal and the Portuguese* (London: Hurst & Co., 2015), 10.

²Paula Carrilho and Heloísa Perista, “Portugal: High and Rising Emigration in a Context of High, but Decreasing, Unemployment,” *Eurofund – European Foundation for the Improvement of Living and Working Conditions*, 15 February 2016, <https://www.eurofound.europa.eu/publications/article/2016/portugal-high-and-rising-emigration-in-a-context-of-high-but-decreasing-unemployment>, accessed on 3 April 2021.



making the emigration of the people of Portugal into the central theme of his book. In this fashion, as Newitt states, he has attempted to write “a history of the Portuguese rather than a history of Portugal.”³ According to Newitt, the movement of people from Portugal, which began *en masse* in the fifteenth century and has continued over 600 years, is the earliest migration of a western European people beyond the Mediterranean basin. It is also, according to the author’s own words, a “remarkable story which is perhaps without parallel in history.”⁴

Newitt tells this story in a book that is divided into two parts. The first part describes the various migrations from the fifteenth to the nineteenth century. The second part deals with migration during the nineteenth and twentieth centuries, to the first decade of the new millennium.

In the first chapter of the book, the author discusses the various historical trends and roles which emigration has played throughout the world, as well as the characteristics which have made the Portuguese diaspora significant. This is followed by two chapters on emigration patterns, from the fifteenth to the nineteenth centuries, from continental Portugal and the Atlantic Islands of Azores and Madeira. In Chapter 3 Newitt also profiles the forced emigration of the Sephardic Jews and the ensuing ramifications for both Portugal and the countries where they settled. Chapters 4 and 5 are dedicated to the migration of the Portuguese to Asia and Brazil. Chapters 7 to 11 are dedicated to describing Portuguese emigration in the twentieth century, with specific chapters on the diasporas in Europe, the Caribbean, Canada and South America, the United States and Africa. In the last chapter, entitled ‘The Portuguese and the Sea’, Newitt attempts to close the discussion on emigration, by painting a nostalgic picture of the ‘White Fleet’ seafarers who fished for cod off Newfoundland’s Grand Banks, through passages from Rudyard Kipling’s *Captains Courageous* and Alan Villiers’ *The Quest of the Schooner Argus: A Voyage to the Banks and Greenland*.

The book also includes a useful glossary detailing the meaning of historical terms related to migrants and their designations, such as *bandeirantes*, *moradores* and *serviçais*, as well as seven tables, with statistical information ranging from the historical numbers of emigrants and slaves entering Brazil,

³Newitt, *Emigration and the Sea*, xiii.

⁴Newitt, *Emigration and the Sea*, 9.

to the various destinations of emigrants, as well as Portuguese emigration to the United States, from 1820 to 1996.

Given Newitt's familiarity with Portuguese colonial history (he is a historian of Portuguese Colonial Africa), as well as his skillful historical narrative, his first six chapters, dealing with emigration from Portugal from the 1400s to the mid-twentieth century are perhaps the most compelling and intriguing parts of the book. Beautifully written and engaging, Newitt's prose paints a picture of a historically multiracial, multiethnic and multireligious Lusophone diaspora—or, more correctly, a series of diasporas—which brought the influence of the Portuguese language and culture to Africa, Asia, South America and Northwestern Europe. This wider historical diaspora was comprised of white Portuguese as well as other Europeans, mixed-race Luso-Africans and Luso-Asians, African slaves, Sephardic Jews and New Christians, as well as people who, though lacking any Lusitanian heritage, took on the Portuguese language and customs, by virtue of emulating the colonial power. As Newitt states: "The Portuguese Diaspora became a diaspora of people of many different ethnic and religious origins."⁵

These diasporas also established the first networks of international contacts and commerce that would make the Portuguese empire the first truly global trading system. In describing these connections, Newitt artfully illustrates how these communities have had a significant impact on the world, through their six centuries of emigration and re-emigration. Indeed, one of the book's most provocative ideas is the suggestion that the bulk of Portugal's contribution to European and world history has largely arisen from the initiatives of these scattered diasporas and not necessarily from the actions (or inaction) of the Portuguese nation-state. As Newitt states:

To a remarkable extent ... the contribution made by Portuguese to European and world civilization, would come from the overseas diasporic community, not from the relatively stagnant and unchanging society of Portugal itself.⁶

While well-researched and generally comprehensive, the second half of Newitt's book is much less compelling and cohesive than the first. For example, the tone of grand historical narrative and interrelated global networks that characterized the description of the diaspora(s) up to the nine-

⁵Newitt, *Emigration and the Sea*, 32.

⁶Newitt, *Emigration and the Sea*, 27-28.

teenth and twentieth centuries settles in this second part into detailed sociological depictions and statistics, describing numbers of emigrants and important social, economic and political characteristics of their communities. This difference is no doubt due to Newitt's main interests as a colonial historian, rather than a sociologist, as well as to the greater wealth of information that is available on more recent migration and settlement flows. However, it is also a consequence of the altered nature of Portuguese emigration from earlier periods to the twentieth century. While earlier waves of migrants often resulted from the colonizing projects of the Portuguese state and were comprised of soldiers, statesmen, priests, convicts, as well as those engaged in commerce, the nineteenth and twentieth centuries were now peopled by vast movements of impoverished rural peasants, whose main interest in their new lands was to quickly find a job and establish their family's economic security. Consequently, in the nineteenth and twentieth centuries, Portuguese emigrant flows became much less ethnically diverse, significantly less entrepreneurial, and much more working-class. Finally, the concluding chapter, with its nostalgic references to the cod fishery, seems like an afterthought and an attempt to bring back the majesty and mystique of the movements that were described in the first half.

Yet, even in this second part of the book, Newitt manages to make important statements reflecting the research on Portuguese immigration. For example, in Chapter 7, the author tackles the ongoing and unresolved scholarly debate about the actual numbers of Portuguese who left Portugal and entered specific countries.

The result of the shift from historiographic storytelling to a greater sociological analysis is a lack of congruity between the first and second halves of this book. This is exacerbated by the relative absence of drawn linkages with the movements, forces and grand narrative that were established in the first six chapters. This lack of connections is a pity, since, as Newitt points out, Portuguese emigration has historically been "*embedded in the long-term structure of the Portuguese economy.*"⁷ Thus, some historical patterns that were established from the fifteenth to the eighteenth centuries and that were the result of forces in the homeland were still influential up to the nineteenth and twentieth centuries, and could have been highlighted.

⁷Newitt, *Emigration and the Sea*, 30 (italics mine).

For example, in the first chapter, Newitt notes that Portugal has historically lacked an active and influential middle class, a fact that partially explains why, as Newitt says, the Portuguese diaspora of today is largely “invisible,” has a “low profile” and exists “beneath the radar”⁸ in the countries of settlement. As Newitt further states, the Portuguese also lack “any discernable group who can bridge a gap that is not only one of wealth and social status but also one of communication.”⁹ This observation astutely explains the relative invisibility of the Portuguese in Canada and the United States, as well as their lack of political and cultural engagement with their host societies. More observations such as these could have been made in the second half of the book and would have been useful in explaining the sociological profiles that were drawn.

Despite these limitations, Newitt’s book is a well-researched and absorbing reference publication that provides a broad amount of information in a very readable and accessible narrative. It is a valuable resource for courses dealing with Portuguese history and/or Portuguese immigration. It is also a compelling book for those who are seeking to learn more about the global social, economic and cultural influence of the Portuguese.

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⁸Newitt, *Emigration and the Sea*, 31

⁹Newitt, *Emigration and the Sea*, 31

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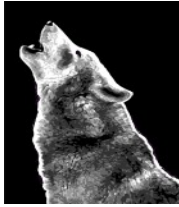
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