

DICIONÁRIO DE HISTORIADORES PORTUGUESES

DA ACADEMIA REAL DAS CIÊNCIAS AO FINAL DO ESTADO NOVO

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MACEDO, Jorge Borges de (Lisbon, 1921-Lisbon, 1996)

This historian and educator of great importance in the twentieth century came from a northern family background. His father, José Pinto de Macedo, an economist, professor, politician and journalist, came from a Douro family, with links to Vila Nova de Gaia and Resende. He was Secretary of the *Partido Republicano Radical* (Radical Republican Party) and supported greater autonomy for the overseas territories, particularly Angola. His mother, D. Maria da Conceição Borges de Macedo, came from a Trás os Montes family, around Macedo de Cavaleiros and Vale Benfeito, and, unlike her husband, was a devout Catholic, passing her faith on to her children. Jorge Borges de Macedo completed his secondary education at the Liceu Passos Manuel, in Lisbon. Amongst his teachers there he would later remember Dr Ângelo Ribeiro, who worked with Damião Pires on his *História de Portugal*. He entered the Faculty of Letters in Lisbon in the academic year 1939/40, distinguishing himself as a student, and being awarded a prize in the academic year 1942/43. He graduated in History and Philosophy in 1944, with a dissertation on "The Economic Situation at the Time of Pombal", which was published in 1951. From 1940 onwards he became known as a contributor to various periodicals, notably *O Diabo*, *Seara Nova* and *Vértice*. The lecture he gave on the topic of his dissertation at the French Institute in Portugal, on 17 March 1952, in which he presented the first findings of his studies on movements at the port of Lisbon at the time, reinforced his standing both nationally and internationally, and was well received by the likes of Veiga Simões, Jaime Cortesão, Vitorino Magalhães Godinho, Virgínia Rau, Earl Hamilton and Lucien Febvre. The text was later published in the *Revista da História*, in São Paulo.

After graduating, and while keeping up his activities in research and in specialist publishing, JBM taught at the Escola Machado de Castro, in Lisbon (1946-48), in the Escola Fonseca Benevides (1948-49), and was Professor of History and Philosophy at the Colégio Moderno, Lisbon (1949-53). He then joined the staff of the Portuguese Post Office, where he became an examiner (1953-57). However, he continued his historical researches on the port of Lisbon in the eighteenth century, and on society in the fifteenth and sixteenth centuries, as well as giving private classes in Philosophy, History and Portuguese, which he kept up for many years. He then secured a position as Second Assistant at the Faculty of Letters, being responsible for classes in Theory of History, a course then organized by Virgínia Rau (which he would take over in 1963), as well History of the Discoveries and Portuguese Colonization, organized by Manuel Heleno. Over time he



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would lecture in Modern and Contemporary History (1958), History of Portuguese Culture (1959), History of Modern Culture (1960), History of Portugal II (1960) and History of Portugal I (1964/65). In June 1964 he defended his doctoral thesis on “Problems in the History of Portuguese Industry in the Eighteenth Century”. By this time his position in the Portuguese universities and his standing in the national and international academic communities were secure. In 1963 he participated in the Fifth International Colloquium for Luso-Brazilian Studies, in Coimbra, and he was nominated Joint Secretary of the Portuguese Commission of the *Comité International des Sciences Historiques*. In 1965 he took part in the Second International Congress of Economic History, in Munich. There followed a trip to Brazil, and participation, in 1966, in the Sixth International Colloquium of Luso-Brazilian Studies, in Boston and New York. From the academic year 1965/66 he also lectured at the Higher Institute of Economic and Financial Sciences (in Economic History) and was a researcher at the Bureau of Economic Research until 1972, when he had to withdraw because of difficulties in reconciling that with his duties at the Faculty of Letters. That year he also organized a course at the Higher Institute of Social Sciences and Overseas Policy. In May and June 1967 he was examined for admission to the teaching staff, and in the following year for the attribution of a Chair. He chose the Chair of Modern and Contemporary History of Portugal, where he made his mark by his structured thinking, his exceptional subtlety and capacity for developing an argument, and his knowledge, always up to date, of foreign research and publications, fundamental for evaluating the position and significance of Portugal and its history on the international scene. He was also responsible for the Seminar on Modern History and courses in Theory of History and History of Modern and Contemporary Culture. In this regard, we should mention the various notes of his courses, taken by generations of students, who drew from them his interpretive schemes, his arguments, and his indications of consequences. His international contacts continued. He attended the International Colloquium on Maritime History in Seville (1967) at which he presented, along with Teixeira da Mota and Prof. Frédéric Mauro, a fundamental paper on the Portuguese sea-routes of the south Atlantic. At a meeting of the *Commission Internationale d'Histoire des Mouvements Sociaux et des Structures Sociales*, in Naples (1969), he gave a paper on agrarian movements in Portugal, as well as taking the opportunity to carry out research in the archives of Florence. In the same year he received an invitation from the Brazilian Historical and Geographic Institute to go to Brazil, he went to Madrid, and he made an official visit to NATO headquarters in Brussels. The following year, 1970, he went to London, and also to the World Congress of Historical Sciences, in Moscow, as Joint Secretary of the Portuguese Section of the *Société Internationale des Sciences Historiques*. In 1972 he was invited to participate in a meeting of historians and sociologists on Spanish and Portuguese topics in the University of Madison (Wisconsin).

With the revolution of 25 April 1974, JBM temporarily left the Faculty of Letters, though he was still in demand from the Universities of Coimbra and Porto as an examiner. In 1976 the Portuguese Catholic University invited him to organize a course in Economic History and to be involved in it personally as an



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Ordinary Professor (with a Chair). In the same year the Centre for the Hotel Trade and Tourism invited him to teach two courses, in History of Art and Portuguese Culture, and the Adenauer Foundation charged him with leading a study group on Fontes Pereira de Melo. In 1977, the Air Force High School invited him to take part in training its senior staff, while similar requests also came from the Institute of National Defence, the Institute of Higher Military Studies and the Higher Naval Institute of War. This was to provide the impulse and occasion for delivering his studies of strategy and comparative history which would lead to the publication of one of his most original and most cited productions, the “Constants and Force-lines in Portuguese Diplomatic History: A Study of Geopolitics”. In 1978 he was designated Vice-President of the Portuguese Commission of the *Comité International des Sciences Historiques*. In 1980 he returned to the Faculty of Letters, in Lisbon, where he resumed his activities in teaching and research, favouring from then on the contemporary period. He was coordinator in the areas of Contemporary History and Methodology, taught History of Portugal (seventeenth and eighteenth century) and Methodology of History, and gave seminars in Contemporary History of Portugal, Business, economic areas and legislation (eighteenth to twentieth century) and Diplomatic History of Portugal.

His academic activity at an international level continued through all of this period. In 1980 he took part in the Third International Meeting of Canonistas, in Coimbra, and the colloquium of the Society for Spanish and Portuguese Studies, in New York. In 1982 he organized a course for university outreach in São Paulo. In 1985, at the First Congress on Strategic Options in Post-Imperial Portugal, organized by the Institute for Strategic and International Studies, at the Calouste Gulbenkian Foundation, he gave a lecture on “Strategic and International Options in Contemporary Portugal: A Critical Perspective”, subsequently developing different aspects of his interpretation of Portugal’s contribution to the European Union. In 1988 he undertook an academic mission with the Portuguese Academy of History for the *Comité International des Sciences Historiques*. In 1990 he took part in the conference at the George Washington University on “Portugal and Spain of the Navigators: The Age of Exploration”, giving a paper on “The Discoveries as an Experimental Realization”, and in Rome, at the invitation of the European Science Foundation, under the programme “Origins of the Modern State”, he gave a paper on “The State in Historiography and in Contemporary Theory and Philosophy”. In the same year he was the official speaker at the Portuguese Royal Bureau of Reading, in Rio de Janeiro, on Portugal Day (10 June). In 1991 he organized a course at the University of Cologne, and went to Zimbabwe to deliver a lecture on “Portugal, the Discoveries and Africa”. In 1993 he gave paper on “The Mediterranean as the Cradle of European Civilization”, under the auspices of the *Europäisches Forum Alpbach*.

From his academic and scientific curriculum we can see the importance attributed by JBM to contacts with foreign scientific research and to the participation of Portuguese historians in specialist international congresses. Especially noteworthy in his own activities were the researches he made in the Paris archives in 1959, in London in 1959 and in 1970, a year when he gave particular attention to the history of business and



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to Portuguese relations with the English, with Jews, and other nationalities. He maintained an engagement in the world of international research all his life, which was evident both in the way he kept up to date and involved with public and international debates and, more importantly, in the international dimension to his work, treating the history of Portugal with the depth and importance appropriate to the European and global scale. He backed up this approach with direct and immediate contact with the specialist bibliography, only possible through his active knowledge of other languages, as both a reader and a speaker, which put him in a position to translate the works of Gordon Childe, T. S. Ashton, Ernest Baker, Georges Clark, Lucien Febvre, F. L. Ganshof, Pierre Ducassé, Daniel Mornet, Paul Vaucher, and to supervise the translation of other authors. On the brink of official retirement, JBM gave his “final lesson” at the Faculty of Letters on 10 December 1991, on “Portuguese Society in the Time of Camões”.

In contrast to the diversity and richness in his teaching, research and lecturing activities, the number of positions he was offered, and actually accepted, was strikingly modest. He was Secretary of the Portuguese Society for the History of Civilization, an offshoot of the *Société Marc Bloch* in Paris which was created in Lisbon in 1949, and which had an ephemeral existence. From 1964 he was Secretary of the Centre for Historical Studies of the Institute for High Culture, an annex of the Faculty of Letters in Lisbon, briefly becoming Director (1973-74) after the death of Virgínia Rau. This organization was committed to the development of three areas of research: the history of the structures of Portuguese society, historical demography, and the history of Portuguese international relations. In the Centre's output we can identify two of the enduring historiographical concerns of JBM, namely the study of the real conditions of the evolution of Portuguese society and the role that international relations have exercised over national history. An intrinsic part of the structuring of the Centre was the creation of the journal *Do Tempo e da História*. The active involvement of Virgínia Rau and JBM put the Centre in a position to create and sustain a project of historical investigation over a long period of time, and assured it an unflinching prestige, confirmed on many occasions by its national and international congeners, as can be seen from the historical archives in the Faculty of Letters at the University of Lisbon. In 1980 JBM was offered the position of Vice-Rector of the University of Lisbon, but did not accept. Neither did he accept, in 1972, the position of Director of the Faculty of Letters. However, in 1980 he agreed to become a member of the cultural commission of the Seventeenth European Exposition of Art, Science and Culture, and in 1983 he would become Area Coordinator of the National Museum of Ancient Art, which was involved in that event. From 1990, as a cultural counsellor and vice-president of the Higher Council for the Defence and Safeguarding of Heritage, he was involved with the Ministry of Culture, with the running of national museums, and in staging various events of European-wide importance. In 1990 he finally accepted the position of Director of the National Archive (Torre do Tombo), and under his leadership modern facilities were inaugurated on the campus of Lisbon University. As its new Director he fulfilled what he saw as its historical and cultural mission by enriching its documentary heritage, through the acquisition of important collections of codices and manuscripts alluding to Portuguese history,



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and he opened it up to the national and international community, by organizing and supporting exhibitions, seminars, day schools, national and international congresses, including, amongst many examples, the second plenary conference of the European Science Foundation entitled “The Origins of the Modern State in Europe” (1992) and the Fourth Congress of the Ibero-American Academies of History (1994).

JBM's involvement with the periodical press began in 1940, even before completing his degree in History and Philosophy, in *O Diabo*, by way of opinion articles and commentaries, reviews of publications and cultural events, and under the heading of “readers' correspondence”. He contributed to *Seara Nova*, from 1946, and *Vértice*, from 1948, and to these we can add *Ler* and the *Jornal de Letras, Artes e Ciências*, from 1952, and the *Bulletin d'Études Historiques*, in 1953. His writings appeared in a wide variety of national periodicals, notably the *Revista da Faculdade de Letras de Lisboa*, the *Revista Portuguesa de História* (Coimbra), the *Boletim da Academia Internacional de Cultura Portuguesa*, *Garcia de Orta*, *Arquivos do Centro Cultural Português* of the Calouste Gulbenkian Foundation (Paris), *Economia* (Lisbon), the *Boletim da Faculdade de Direito* (Coimbra), the *Revista Portuguesa de Filosofia* (Braga), *Brotéria*, the *Revista da Biblioteca Nacional*, the *Revista de História das Ideias* (Coimbra), a *Revista da Universidade de Coimbra*, *Didaskalia* and *Estratégia*, *Revista de Estudos Internacionais*. His involvement in the press and other social media was ever increasing, whether in the form of statements and commentaries on cultural and topical questions, or in interviews, programmes and series. By the 1970s he was contributing to the *Diário de Notícias*, and other papers such as *O Tempo*, *A Tarde* and *O Semanário*, and by the end of the decade was appearing more frequently on radio and television. From early on he also contributed to collective works. With Joel Serrão he prepared a first collection of texts for teaching philosophy, the *Breve Antologia Filosófica* (1947) and he contributed the article “As Condições Sociais da Cultura (Séc. XV)” for the *História da Cultura em Portugal*, by António José Saraiva (1950). Also noteworthy are his twenty-five entries for the *Dicionário de História de Portugal*, organized by Joel Serrão (1963-68) and the eighty-nine entries for the *Verbo Enciclopédia Luso-Brasileira de Cultura* (1963-86), and his work with *Focus*, *Enciclopédia Internacional*, in the *Dicionário Político do Ocidente*, and in *Polis*. Another aspect of his public cultural intervention was the advice he gave on organizing various kinds of exposition; we may note here his work on *O Triunfo do Barroco*, as well as *Europália* (1991).

Regarding research, his first significant piece of historical study was his bachelor's thesis of 1944 (mentioned above). However, JBM had started to publish texts on culture and history in 1940, already outlining in them the principles and outlook that would guide his production, such as calling attention to the cultural and social responsibilities of intellectuals and the importance of education; the value of models of classical culture; an interest in understanding the culture and religion of other cultures; and the danger of interpretation and anachronism. He dealt with the great themes of Portuguese history and its relationship with world history, especially with regard to the international situation, the revolution of 1383/85, the historiographical revision of the Marquis of Pombal and his time, the political theory of the exponents of



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Liberalism, such as Garrett, and the significance of the revolutions of the nineteenth century for the development of Europe in the contemporary world. From early on he discussed the consequences of industrialization in European and world economic life and examined the consequences of the industrial revolution in England, laying out a perspective for a comparative economic history that integrated the specific data from national histories on the nineteenth and twentieth centuries. Later he would develop this in his teaching, highlighting the differences between the process in England, which W. W. Rostow would describe by the term “take off”, and that in France, which Paul Mantoux described as “industrialization”.

The genesis and evolution of his historical thinking can thus be understood in relation to the cultural and political interests of the family and social environment in which he grew up, in relation to his training, at the Faculty of Letters in Lisbon, and as a response to the different events he lived through, and which he tried to understand through different criteria and precise analyses, distinguishing long-term, medium-term and short-term factors, and the human response to time and place. These were his guiding principles for historical understanding, in line with the revisions of Marc Bloch and Lucien Febvre, later followed by Fernand Braudel. These were the criteria of his own intellectual career which he adopted as necessary aspects of his thinking, to which he added the realism and clarity of explanation of English historiography which he also cultivated early on, the integration of technological questions into a scientific and sociological vision, and studies of the market, which caused him to reject, in the name of History, both the ideological responses which try to take in everything but which fail to respond with precision and rigour to a given problem, and the immutable explanations of material or structural determinism in which the time and the method and human intervention play no part.

Thus he rejected the primacy of the general principles dear to António Sérgio, with their “Minervan” immutability, as inadequate as a tool for the historian. In this regard, defending the capacity for personal decisions and responsibility, he quickly rejected the immutable and deterministic ideas of Buddhism. His criticism of António Sérgio’s approach to historical interpretation aimed to contest the primacy of reason, to the detriment of seeing historical reality, particularly with regard to the revolution of 1383/85, and it was fully developed in his paper “The meaning and evolution of polemics of António Sérgio. The ideology of reason (1912-1930)”, published in the *Revista de História das Ideias*, in Coimbra, in 1983. JBM drew attention to the complexity of reality, to the need to define the conjuncture, especially for phenomena as complex as wars. He also insisted on the diversity of factors and perspectives by which one should seek to understand the Discoveries, citing, against Sérgio, authors he admired, such as Joaquim Bensaúde, Carlos Malheiro Dias, Luciano Pereira da Silva, Duarte Leite and Jaime Cortesão. For similar reasons he praised Paulo Merêa, Lúcio d’Azevedo, Leite de Vasconcelos and Carolina Michaëlis de Vasconcelos.

While dealing with the analysis and understanding of physical and geographical factors, and aspects of mentality, class or social group, JBM also rejected the determinism of any of these factors as a single explanation, looking to elements of personal responsibility. His position is ultimately close to that of Raymond



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Aron, whom he greatly admired, along with his denunciation of any type of “opium of the intellectual” (i.e. Marxism). An analysis of his first articles, including his first major work previously referred to, shows that JBM adopted this position very early on. It brought him close to Jaime Cortesão, the historian of the global vision and the need to explain reality, as is materially evident in his work *Os factores democráticos da formação de Portugal*. On 25 January 1953, JBM was a speaker for the Historians’ Group at a dinner in homage to Jaime Cortesão, when he returned from exile. Later his admiration for Cortesão would be expressed in his study “The Theory of History in Jaime Cortesão”, published in *Prelo* (1984). In other writings, he explained the importance he also attributed, in his historical studies, to Alexandre Herculano, Almeida Garrett, Eça de Queiroz, Rebello de Silva, Oliveira Martins, António Sardinha and Silva Cordeiro.

The prefaces he wrote for his works give further evidence of his theoretical approach. In the preface to the first edition of his bachelor’s thesis he rejected the notion of a singular, determinant explanation, calling for a concrete study of society as a point of departure, insisting on concrete explanations, with concrete reasoning, and substantiated or sustainable hypotheses. According to JBM, the constitution of historical science lives by the questions each epoch poses, and in this respect he invoked Herculano, whom he considered a “most distinguished historian”. Provisional studies were not false or useless, but steps in a synthesis under construction. He also recorded his thanks to two of his professors at university, Silva Marques and Magalhães Godinho. His theorization continued, criticizing from the outset the perspective of the “great man” without a study of the environment, the society, the administrative mechanism, the economic structure. An individual conception of history should coexist with a concrete study of the period, of the conditions inherited from the past, and of notions of continuity, the “fundamental law of historical methodology”. On this basis one could evaluate the tenor of a period, whether it represented a break or a continuity. It was from this perspective he aimed to study the actions of Pombal, and to introduce the notion of a *phase* in the period of his government. In this light he would study a period that historiography had generally treated as a whole, by trying to determine the economic phases that constituted it.

This reasoning was laid out in the second edition of his study, published in 1982. In the new Preface, at a time when the relegation of politics hindered any characterization of the “Portuguese world”, his study of Pombal was presented as a study of the decision-making process, and in this dialectic JBM invoked Hegel amongst a series of references that included Burnham, who had drawn attention precisely to the commercial dynamic. He set out to study the time of Pombal, to formulate hypotheses for understanding its conjunctural *situation*. In this light Macedo insisted on clarifying political concepts, rejecting the notion of a monolithic absolutism and substituting for it “absolutism as a theory of power”, a concept he had defended, as he recalled, in his article for Serrão’s *Dicionário de História de Portugal*. According to this conception, Pombal was an individual emerging from a group that represented a political alternative. In any case, it was necessary to take into account all forms of social resources, including technology, to which he would devote attention in another fundamental work, his doctoral thesis. As stimuli for the second edition he referred to



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Luís de Albuquerque, and again invoked Silva Marques and Magalhães Godinho. He also explained what he owed to Hegel and the young Karl Marx, to Ernest Mach and Luppol, Gama Barros, Alberto Sampaio, Basílio Teles, Paulo Merêa, J. Lúcio d’Azevedo, Alfredo Pimenta, Veiga Simões, Mário de Albuquerque and Vitorino Magalhães Godinho, and in his method to Marc Bloch and Lucien Febvre. In the preface to the third edition, published in 1989, he both reiterated and revised his views. In it he insisted on an interdisciplinary approach to characterizing the economic and social conjuncture, and on politics as an indispensable interpretation of situations, as agent of a creative minority, as Toynbee had understood, responsible to the majority that elected it. Referring to Marc Bloch’s vision of feudal society, he called for an integrated vision of Portuguese society, from the time of the Methuen Treaty up to Liberalism; he also cited the debate on the meaning of “enlightened despotism”, referring to his article on the topic, also in the *Dicionário de História de Portugal*, insisting that absolutism and internal political struggle could coexist, and that this had been the case in Portugal. In the second edition of his doctoral thesis, which came out in the same year, he indicated amongst other influences Dilthey, Husserl and Hartmann, the *Annales*, Fernand Braudel, Jean Meuvret, Arnold Toynbee, Max Weber, Ernest Cassirer, Huizinga, and once again Paulo Merêa.

JBM rejected history as a system, history as a self-sustaining structure, but he could make use of long-term criteria, in dialogue with factors for change. So he understood the historiographical position adopted by Braudel, which Marxism tried, unsuccessfully, to make entirely its own by insisting on the physical and material world as determining factors, and by confusing the definition of economic dynamism with that of capitalism. To this merging Braudel counterposed the importance of human choice and the economic world as a human artefact. And confronting a mathematical structuralism, JBM emphasized the importance of smaller phenomena in history and ability to form a personal judgement. But one could also reap many other references from his magisterial classes, with an appreciation of the contributions of Oswald Spengler, Lewis Mumford, Vilfredo Pareto, George Kennan and Frédéric Mauro. It is from this group, to which once again we should add Max Weber, that are derived the notable sociological and structural references in his work, which accompany his concerns with characterizing political phenomena through the study of the formation and substitution of elites in Portuguese history.

In his book, *Problems of Industry in Portugal in the Eighteenth Century*, previously mentioned, he had studied the “conditions of Portuguese industrial infrastructure in the eighteenth century”, and cited his researches into the Port of Lisbon, which should in his view continue, in order both to elucidate its international role and to explain its importance to Portugal in relation to its agricultural and industrial structure. JBM aims to explain the conditions of modern Portugal in terms of its own problems and themes, its ways of adjusting to its position by way of industrial, agricultural and commercial practices, by examining production and distribution. Having made a survey of Portuguese industry, he could affirm that the introduction of manufacturing had been done to give “a new shape to the kingdom’s factories”, and not to create them. It remained to be seen if the traditional ways of Portuguese industry, based on small workshops



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and homeworking, continued to be competitive. The publication of *Pragmáticas* confirmed a belief in this possibility. And the truth is that traditional Portuguese industry resisted throughout the eighteenth century. It was in this light he studied the “true” significance of the Methuen Treaty, and what Napoleon’s Continental Blockade meant. It became clear that Portuguese industry would collapse at the start of the nineteenth century, and that the Revolution of 1820 did not correspond to any industrial surge or development, or any kind of economic relaxation.

His work on the Continental Blockade (*O Bloqueio Continental*), which was published before his doctoral thesis but which, as we can infer, was being developed at the same time, is worth mentioning at the outset amongst JBM’s historiographical output because it insists on dealing with theoretical points in approaching economic history and its relationship with political history. In his preface he focuses on the theme of national histories, valuable elements of culture for the formation of ideologies, or parts of them (which are characteristics of general histories), and which “broadly compensate for the lack of men’s direct experience, inevitable in general histories. At the level of direct experience, nothing can replace the sequence of national events”, which furnishes “the unifying sense to a complex social body, structurally integrated in all aspects of human existence, which is concentrated in a collective body, particularly when it is politically independent.” As a historian, Machado drew attention to “the undeniable individuality that national histories contain”, and, in a second line of consideration, asserted that to the various perspectives that history was required to deal with, military, political and religious, should be added the economic, which lacked in many cases a proper classification of problems in relation to time and a proper evaluation of particular cases. In the second edition of this study (1990), JBM said that he aimed for an economic history free from determinant ideological pressures, and sought the scientific conditions for a global history within an integrative but non-determinant logic. He aimed to battle against ideology in the human sciences, and to analyse the English Alliance outside the framework of Continentalists vs. Anti-continentalists. And in the light of the experience of the Second World War, he would evaluate Portuguese strategy according to von Clausewitz’s rule of avoiding being subjected to the enemy’s will, and being able to continue the military struggle. There follow his reflections on the possibilities for a small territory in the face of a larger structure, the question of where regional areas start and end, and what constitutes the rear-guard of Europe.

In a similar way he concerned himself with defining the characteristics and the importance of Portuguese culture. In a 1968 work which he gave the title *Portuguese Culture in the Contemporary World: A General Problem*, he defined what he understood by Portuguese culture. At its outset it may have re-elaborated and reused resources from other areas, but as a form and a function of adaptation and expression, Portuguese culture fulfils its role, for which there is no substitute, in the creation of a language, in its artistic sensibility, in its heroic and epic expression, in the formulation and theorization of its objectives and political possibilities, from its origins. In technical resources too, it forged its own seafaring capacity and its administrative shape, which are also relevant aspects of culture. In this light, JBM reflected in 1973 on the polemic around the use



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of the expression *estrangeirado* (“foreignized” person) and the evolution in the sense attached to it, ranging from a criticism of those who did not understand the culture and civilization into which they had been born to an endorsement of the superiority of ideas coming from those who adopted a critical attitude and a principle of external validation. On this point Macedo asked himself “if the creation of the *estrangeirado* does not sketch out the problem of influences in ways that subordinate other factors”, if it did not form part of a scheme of self-validation, an aristocracy of power, whatever that might be. In that case it would be necessary to scrutinize the true dialectical tensions in Portuguese culture and society, and to establish the true scale and significance of the *estrangeirado*.

Concomitantly, JBM tackled the fundamental questions of Portugal’s capacity to exist as a nation and as a state and its position on the international scene, of Portuguese expansion and the specificity of the colonial regime, while at the same time elaborating a theory of the various phases of absolutist power and defining concepts and the application of the terms bourgeoisie, nobility, centralism, enlightened despotism, commercial companies, industry and industrialization. Also notable are his interrogation of and his proposals for a critical definition of the processes of formation of elites in Portugal, the role of minorities, and the problems of social mobility from the Absolute Monarchy to the Liberal regime. Over the years he worked on his *Constantes e linhas de força da história diplomática portuguesa*, a synthesis of political, diplomatic, military and comparative history. This is a work based on a geopolitical perspective which does not contradict or ignore the traditional diplomatic history, whose value it recognizes, pointing particularly to the Viscount of Santarém and Eduardo Brazão. In it he analyses “the sequence of events in which Portugal has been involved” and “the solutions which, in the face of them, those responsible [...] were able to elaborate and impose”. It tries to understand “the royalist administration” “guided by political will”, with the aim of defending its independence and national security. If it has a theory, it would be “the theorization of Portuguese experience”. Its point of departure is “the Nation in its place”, which we can and should understand by the contribution to its elaboration by Marc Bloch and Lucien Febvre and also by Orlando Ribeiro, and their preference for geographical challenges to the detriment of any determinant phenomena. He underlined the irreplaceable role of the elites, in culture, in political administration, in economic strategy, in their military capacity. The defence of national independence was key to determining the capacity of the elites and the internal mechanism for their selection and endorsement. Beyond the realm of the necessary there was also the decisive area in which national political will was exercised. Emphasizing that the unit of analysis is the modest potential of a nation that structures itself as a nation, JBM considers that it is precisely in the smaller powers that the relationship between internal and external politics is most obvious and where the “utility” of the state is most evident. The distinction made between different conjunctures expressed in the work follows these principles.

Throughout his life JBM continued to respond to the interpellations that his times made of history, a point in common with Herculano, who had interrogated history by asking himself about his own times. JBM



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responds through his work, by analysing the underlying historical positions, their arguments, and their criteria of validation. While not a polemicist, in the sense of counterposing positions with a view to the victory or defeat of a given proposal, he gave particular importance in academic debate to clear and well-founded hypotheses. In this respect he was close to Karl Popper. Rather than a polemical approach this represents an analysis of the positions that JBM recognizes as important, while not necessarily agreeing with them, and which he is interested in elucidating for the consequences that might flow from them for the advancement of knowledge. In other words, it is not a primordial taste for polemic but the consequence of a conception of the role that the intellectual should play. In the same way that he debated the positions of António Sérgio he would come to disagree with certain reductive interpretations of the work of Luís de Camões and of Portuguese humanism. He also embraced Herculano and commented on his *Origins and Establishment of the Inquisition in Portugal*, and he drew attention to the importance of Garrett, to Rebelo de Silva's *História de Portugal*, to Lúcio d'Azevedo's *Epochs of the Portuguese Economy*, and to the work of Oliveira Martins. In the same way he praised the position of Américo da Costa Ramalho regarding his characterization of Portuguese humanism, and underlined the importance of Frédéric Mauro's work on the Atlantic and European expansion.

As to his civic intervention, the most recent remarks were made by José Brissos (in introducing the exhibition by Ana Macedo, *Jorge Borges de Macedo: Private and Published*, 2010), who emphasized that JBM "lived out in an intense, almost dramatic way, the spiritual, political and cultural experience of the twentieth century", participating in the debates and the intellectual and political choices taking place, amply portrayed in his work, in an ideological evolution that generated controversy amongst those who did not understand it. He was driven by imperatives of conscience and rational choice, by truth, by freedom and moral dignity and by independence in the face of authority. His political choices, then, were the consequence of a maturing of his private opinions, and of his inconformity. While in his youth he had been a political activist in opposition to the Estado Novo, and a student leader close to the structures of the PCP, and involved in groups such as MUNAF and MUD, in 1948 he supported the presidential candidacy of Norton de Matos, and was later involved in the Mealhada revolt and was imprisoned in the Aljube fortress. Later he distanced himself from these organizations and in the face of the Spanish Civil War, the German-Soviet Pact of 1939, the PCP's unswerving loyalty to Moscow, and the invasion of Hungary in 1956, JBM ceased to be an opponent of the regime, although he always maintained a critical independence towards the Estado Novo, advocating changes that would guarantee greater liberties, political participation, and effective internal debate. However, favouring reforms and renewal rather than revolutions, he considered that democracies needed some principle of authority. At the same time he gave his attention to social problems and to the social doctrines of the Catholic Church. For these reasons he welcomed with some optimism the government of Marcelo Caetano and the revolution of 25 April 1974.



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JBM belonged to the Portuguese Academy of History, the International Academy of Portuguese Culture, the Portuguese Commission of the *Comité International des Sciences Historiques* (Lisbon), the *Comité International de l'histoire des mouvements sociaux et des structures sociales* (Paris), the Historical Association (London), he was academic correspondent to the Brazilian Historical and Geographical Institute (Rio de Janeiro), corresponding member of the Brazilian Society for Historical Research and the Academia Paulista de História (São Paulo). He was also a corresponding member of the Maritime History section of the Naval Academy (1984), of the *Real Academia de la Historia de España*, academic correspondent to the National Academy of History of Venezuela, corresponding member of the Fourth Section (History and Geography) of the Lisbon Academy of Sciences (from 1989), and a member of the European Science Foundation. In February 1990 he was nominated vice-president of the Higher Council for the Defence and Safeguarding of Heritage. At UNESCO he was also a member of the Latin American History Commission.

In his curriculum we may also note, amongst other distinctions, the Abílio Lopes do Rego Prize and the Alexandre Herculano Prize, and his admission as an officer to the *Ordem de Santiago e Espada* (Order of St James and the Sword), conferred on him by the President of the Republic, Dr Mário Soares.

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APOIOS:

