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The deep roots of the Carnation Revolution: 150 years of military interventionism in Portugal

ABSTRACT

The military coup on 25 April 1974 initiated the Carnation Revolution that put an end to the New State, the longest-lasting authoritarian regime in twentieth-century Europe. There are several alternative explanations about what caused such a process of regime substitution in Portugal. This article focuses on one of them: military discontent and participation in politics. It analyses the history of civil-military relations from the aftermath of the Napoleonic Wars until the demise of the New State. It shows that the attitude of the military in 1974 was not merely conjunctural and that the tendency to intervene in politics was entrenched in the armed forces since the fall of the ancien régime. Although the nature and intensity of its participation in state affairs evolved throughout the nineteenth and twentieth centuries, the Portuguese military never completely accepted civilian supremacy. Military interventionism was nurtured by political polarization, institutional weakness, and disagreements over foreign policy, the use of the armed forces against internal enemies and the deficient equipment and preparation of the troops. Periods of active involvement in politics alternated with others in which interventionism remained latent.

KEYWORDS

coup d'état
New State
military
interventionism
civil-military relations
politicization
pronunciamentos

INTRODUCTION

There are several competing interpretations about the driving forces that caused the downfall of the New State and initiated democratization in Portugal. Systemic deficiencies (Schmitter 1999), social movements (Chilcote 2010; Santos 1998), international pressures (Telo 1999) and political elites (Reis 1994) can all be considered important elements for the demise of the dictatorial regime. However no account on the fall of the New State would be complete without taking into consideration the action of the armed forces. The role of the military in enabling the Carnation Revolution and guiding the political reforms during Portuguese transition has been sufficiently documented (Graham 1993; Porch 1977; Rezola 2006). This article shows that the coup of 25 April 1974 was not an isolated phenomenon exclusively produced by a set of contextual factors, as those mentioned above, but the latest expression of a long historical trend of military intervention in Portuguese politics.

History shows that the armed forces has often used its coercive power, *esprit de corps*, discipline and organizational capacity to influence, displace or supplant (de facto or *de jure*) civilian governments (Finer 1988 [1962]: 127). During times of political instability and institutional crisis, either on its own initiative or encouraged by other social actors, the military sometimes intervenes in politics. In the past, the Portuguese military has often attempted to shape political outcomes via military declarations, *pronunciamentos* or directly by overthrowing the government by force, such as the 25 April coup (Valério 2001: 814–31). This article revisits the history of military discontent and participation in Portugal through six distinctive stages from the end of the Napoleonic War until the Carnation Revolution. Although the motivations for intervening in politics evolved according to the political and ideological context (Ferreira 1992; Freire 2009) this article shows that the military in Portugal was never completely extricated from the political arena until the consolidation of democracy in the 1980s. The political polarization, the institutional weakness during regime changes, the armed forces' role as guardians against the internal enemy, their precarious working conditions and disagreements with the government's foreign policy, were the most important propitiatory factors for military interventionism.

THE ERA OF PRONUNCIAMENTOS

The intervention of the military to topple the New State cannot be disconnected from the long tradition of military intervention in politics in Portugal. This trend can be traced back to the aftermath of the Napoleonic Wars which produced the end of absolutism, a power void and political turbulence, while increasing the prestige of the armed forces, thus opening a window of opportunity for military interventionism. The Liberal Revolution that resulted in the dismantling of the British protectorate led by General Beresford was set off by a military *pronunciamento* in 1820 (Santos 1990: 41). This rebellion, inspired by the American and French revolutions, as well as by the Spanish liberal constitution of 1812, enabled the introduction of liberal principles and institutions, reflected in the 1822 constitution, and contributed to the consolidation of the bourgeoisie and the military as fundamental political actors (Gallagher 1983: 13). Military coups and *pronunciamentos* became usual mechanisms of political action (Costa, Domingues and Monteiro 1989). The involvement of the military in politics became so entrenched that from the enactment of the constitution of 1822 until the foundation of the New State in 1933 a large majority

of Portuguese prime ministers were military: 31 different military men led the government, several of them enjoying more than one mandate.

After the Liberal Revolution the military did not act as a cohesive institution. The opposing legitimacies of different pretenders to the throne and the pressures from different political factions ended up dividing the military (Valente 1997). King João VI died in 1826 without an heir. His successor Dom Pedro, Emperor of Brazil, unsuccessfully tried to reconcile the partisans of liberalism and absolutism by enacting a new constitution, the Charter of 1826. His abdication in 1828 gave way to civil war between the two factions. The absolutists supported the appointed regent, Dom Pedro's brother, Dom Miguel, while the liberals backed Dom Pedro's daughter and official heir, Dona Maria.¹ In 1834 Dom Miguel was defeated and Dona Maria II crowned queen. The end of the war did not mean the end of military involvement in politics. The tensions within the ranks provoked successive changes in the government and military command. One faction was loyal to the liberal constitution of 1822 (*setembristas*) and another defended the principles of the more conservative Charter of 1826 (*cartistas*). Many *pronunciamentos* took place, such as the Revolution of September 1836 that proclaimed again the 1822 constitution, the absolutist Marnotas Conspiracy (Conspiração das Marnotas) and the Marshall's Revolt (Revolta dos Marechais) of 1837 that opposed the *cartista* Marshalls Saldanha and Terceira to the *setembrista* Marshall Sá da Bandeira. Moreover, there were up to twenty changes in the government from 1836 to 1842, many of them provoked by military pressures (Mascarenhas 1982: 260).

Military intervention in politics became very important after 1851 when Marshall Saldanha forced the resignation of the prime minister, Costa Cabral, who had been the most powerful figure in Portuguese politics since 1839 (Santos 1989). Saldanha set in motion an ambitious project of regeneration for Portugal formalized in the Constitutional Reform (Acto Adicional) of 1852. The reign of Pedro V (1853–61) was characterized by relative stability favoured by the ambitious policies of investment in infrastructure and modernization launched by the powerful minister, Pereira Fontes de Melo (Torre Gómez and Sánchez Cervelló 2000: 43–47).² The successor of Pedro V, Luis I, with the support of Marshall Sá da Bandeira, defeated a new military putsch commanded by Saldanha in 1870 (*saldanhada*). These two rival military leaders can be considered among the most important political figures in that period of Portuguese history due to their participation in most governments and *pronunciamentos* from the 1820s to the 1870s (Caeiro 1997: 49–61).

After 1870 the military gradually turned its attention away from internal politics and focused on their external enemies. Military satisfaction was favoured by the economic prosperity experienced by Portugal prior to 1888 (Mata 1991: 757–58) and by the far-reaching reforms and budget increases implemented by Fontes de Melo (Mónica 1997: 739–40). The consolidation of the colonial possessions in Africa in the second half of the nineteenth century also contributed to military prestige and diverting the attention away from domestic politics. However, the colonial expansion also created new tensions and discontent within the ranks. In Africa, Portugal competed with the United Kingdom and Germany. In 1890 the British Empire set an ultimatum for Portugal with the aim of forcing it to abandon the aspiration of uniting the territories of Mozambique and Angola. This ultimatum and the acceptance of the conditions imposed by the British opened a period of governmental crisis and the emergence of nationalist and republican ideas in the armed forces (Antunes 1990: 24; Teixeira 1990; Rego 1966: 151, 228–30). In 1891 a group of

1. Dom Miguel had led the *abrilada* absolutist military coup on 30 April 1826 and been exiled afterwards. He swore the Constitution on 26 February, but on 23 July he declared himself absolute monarch.
2. Pereira Fontes de Melo was a soldier who headed the naval, treasury and industry ministries and later became prime minister (1871–77 and 1878–79).

officers revolted in Oporto and attempted to establish a republic, imitating the proclamation of the Brazilian Republic in 1889. The rebellion failed and those involved were imprisoned or exiled. This was the last violent military intervention during the nineteenth century in Portugal. Direct military participation in politics had diminished (Ferreira 1992: 29) but republican ideas persisted especially within secret societies such as the Carbonaria and Freemasons. The republican revolutionary cause gained supporters within the armed forces in particular among navy officers who thought the allocation of military resources by the monarchic governments was unfair (Ramos 1994: 379). The evolving socio-demographic composition of the increasingly middle-class officer's corps can be also linked to the process of republicanization of the armed forces (Carrilho 1985: 124–26). The military again played an important role in the revolution that in 1910 deposed the last king of Portugal, Manuel II, and established the Portuguese First Republic (Carvalho 2012: 147–84).

THE PORTUGUESE FIRST REPUBLIC AND THE MILITARY DICTATORSHIP

The military had distanced itself from the traditional monarchic parties and did not support the latter when the republicans launched their coup (Valente 1976: 95–7). The revolution began as a social movement, but the involvement of some groups of soldiers was important for its success (Carrilho 1985: 83–95). The Portuguese First Republic was politically very unstable, with 45 different governments in sixteen years (Porch 1977: 18–19) and up to 21 different *pronunciamentos* and coups (Pabón 1942: 112). The military reform and purge of the monarchic officers by the war minister, Correia Barreto, in 1911 increased polarization within the ranks. The creation of the National Republican Guard (GNR – Guarda Nacional Republicana) in 1910 and the suspension of voting rights for soldiers in 1911 also became controversial measures (Caeiro 1997: 95–96). The military was disillusioned by the sense of disorder and disunity in the new regime and increased its interventions. Some military endorsed the radical republican views defended by Afonso Costa while others embraced conservative republican or monarchic ideals. The action of secret societies and personal rivalries compounded the problem. The radical republican revolutionary attempt in 1913 and the monarchist revolts of 1911, 1912, 1913 and 1914 are some of the most important examples.

The beginning of the First World War in 1914 increased the instability, radicalization and politicization of the military. Portugal entered the war and more than 200,000 men were recruited, with nearly 100,000 sent to fight in either the European or African theatres. In addition to the thousands of casualties, the war effort was economically very costly and had an enormous impact on Portugal. The deficiencies of the Portuguese armed forces in terms of material means, preparation and discipline were revealed during their participation for the war (Ferreira 1992; Marques 2004). Portugal did not have the capacity to guarantee the defence of its territory through military means, and the colonial map did not allow further conquests. These factors contributed to the redefinition of the role of the military, with its mission redefined as guardians of domestic order, a sort of police that had to deal with radical political opposition movements and revolts, which made it more prone to intervention in politics (Welch 1987). In January 1915, a group of officers of different ideologies, grouped together as the Swords Movement (Movimento das Espadas) and led by Captain Martins de Lima forced the resignation of

the government and the appointment of General Pimenta de Castro as prime minister. Accused of dictatorial policies, the government was toppled by an armed revolution organized by the Democratic Party in May 1915 (Serrão and Marques 1987: 710; Wheeler 1979a: 111–25, 132–33).

In 1917 Major Sidónio Pais became prime minister via a military coup. He imposed a centralized personal system of control and instituted fundamental reforms to create an authoritarian new republic (*república nova*), the precursor of the New State. After the assassination of Sidónio Pais in December 1918 and the attempt to restore the monarchy by a military revolt in Oporto in 1919 a democratic government declared the return to the 'old republic'. This period saw the emergence of new parties and politicians but the instability remained. The government strengthened the GNR as means to shield itself from armed intervention. However, in 1921 some officers of the GNR planned a revolutionary movement and assassinated the prime minister, António Granjo, and some other important political and military leaders during the *Noite Sangrenta* (Bloody Night). Insurrections and terrorist attacks became commonplace. The financial crisis and political instability delegitimized the republican political parties in the eyes of many military and other societal actors.

After a failed coup attempt in April 1925, the republic was finally brought to an end by a nationalist and anti-parliamentary revolution on 28 May 1926 (Carvalho 2012: 298–340). General Gomes da Costa revolted in Braga and marched into Lisbon to establish a military dictatorship (1926–33). Although initially the 28 May Revolution was ideologically very heterogeneous, the conservatives eventually prevailed (Antunes 1978: 122). After a series of internal struggles, General Antonio Oscar de Fragoso Carmona forced the resignation of Gomes da Costa and assumed the Presidency of the Republic (Santos 1990: 400).³ Carmona was confirmed in office by the presidential elections of 1928 and appointed a university professor, António de Oliveira Salazar, as finance minister. Salazar requested special powers to tackle the economic problems Portugal was suffering. The initial success of his reforms coupled with the extended perception that the military would be incapable of resolving the crisis by themselves consolidated Salazar as the political leader of Portugal (Antunes 1994: 16–17). He gradually centralized decision-making capacity to the extent he became known as the 'financial dictator' (Nunes 1930). In 1932, he was appointed prime minister and initiated a constitutional project to establish the New State, which became the longest-lasting authoritarian regime in twentieth-century Europe.

THE FIRST YEARS OF THE NEW STATE

The New State was a civilianized and corporatist authoritarian regime (Linz and Stepan 1996: 117) designed to enhance consensus among the ruling elites (Pinto 1994: 67–75). Nationalism, conservatism, Catholicism, ruralism and paternalism were markers of the regime identity (Medina 2000: 42). The New State was neither an extension of the military dictatorship nor a radical depart from it. The longevity of the New State was based on Salazar's management of the balance between the elites rather than on his personal authority (Rosas 1989). Nonetheless, during the 1930s Salazar gradually centralized power and worked to reduce the influence of the military that had helped install him (Almeida and Pinto 2003: 12–14). The Spanish Civil War and Second World War accelerated the process of personal empowerment. As well as being prime minister (1932–68), Salazar held other positions in government,

3. Some military were also close to the *Revivalho*, a very active republican opposition that attempted several plots against the military dictatorship and the Salazar regime up until the early 1940s (Farinha 1998).

including finance (1928–40), war (1936–44), foreign affairs (1936–49), defence (1961–62) and served as interim President of the Republic in 1951. Although General Carmona remained the official president, executive power was held by Salazar (Campinos 1978). Officially, the prime minister was appointed by the president, who was in turn elected by the people in often unfair elections. However, Salazar effectively had the upper hand in the power relationship because he controlled the official party, the União Nacional (UN – National Union), which nominated the presidential candidates (Caetano 2000 [1975]: 775–76). The chambers of the Portuguese parliament, the National Assembly and Corporative Chamber, had a merely symbolic role. Their legislative power was limited and were basically employed by Salazar, and later Caetano, as a divide-and-rule device and a source of internal and external legitimacy (Schmitter 1999: 81–90).

Despite the apparent similarities with the Franco regime in Spain and the surface of stability, the New State presented a rather complex situation in terms of civil-military relations. Franco's and Salazar's individual interests, experiences and inclinations left a clear imprint in the diverging civil-military relations. Franco was in a stronger position vis-à-vis the military than Salazar. Franco was a general who had won a civil war, completely purged his armed forces and maintained close contact with the military (Preston 1993). Salazar had been a student in a seminary before becoming a law professor who was appointed by the military. Moreover, he was a reserved man who maintained more distant relationships. Salazar did not succeed in completely subordinating the military, which periodically threatened his government. The Portuguese military held more political power and was more prone to intervene in politics than its Spanish counterpart. The rebellions in Madeira (1931), Marinha Grande (1934), on the Tagus (1936), Mealhada (1946), the *abrilada* revolutionary plot of 1947, the 1959 Sé rebellion, Botelho Moniz's 1961 attempted coup, the 1962 rebellion in Beja and the 1974 Carnation Revolution, are probably the best-known expressions of military discontent and opposition, but there were more. The sheer number of military plots and coup attempts – up to twenty between 1926 and 1974 (Manuel 1995) – shows subordination was not fully achieved.

The military did not control the regime but it continued to occupy crucial positions in the government and administration. For instance 15.2 per cent of the members of the Corporate Chamber (Ferreira 2009: 345) and 26.2 per cent of the ministers had a military education (Almeida and Pinto 2003: 25). The military were also very well-represented in the censorship services (Gomes 2006), the GNR (Wheeler 1979b: 201) and the voluntary militia, the Portuguese Legion (LP – Legião Portuguesa) (Rodrigues 1996). During the early years of the New State the army was granted a large degree of autonomy as means to encourage it to support the regime (Ferro 2003 [1932–38]: 22–23). Salazar later became concerned by military political activity. He believed if they became used to civilian life they would gradually lose their *esprit de corps* and sense of discipline.

Salazar publicly advocated the professionalization, rearmament and reorganization of the armed forces as means to remove the military from politics (Salazar 1935: 103). However, the evidence suggests that in practical terms Salazar was less concerned with developing military professionalism and modernizing the army than he was with co-opting their leadership to ensure they remained under his sway (Faria 2000; Wheeler 1979b). Salazar introduced a series of reforms intended to subordinate the military to his authority.

In December 1937, ministerial approval became a condition for the admission to the elite senior staff corps (Decree-Law 2840) and a merit-based system of appointment (*escolha*) (Decree-Law 28402) replaced the traditional seniority principle for military promotions from the rank of captain upwards.⁴ At the same time Salazar reduced the military retirement age (Decree-Law 28404). The combination of these measures had an enormous impact on the control of the military (Pinto 1994: 288). Many of the senior officers who had questioned Salazar's growing power were forced into retirement and replaced by younger officers whose allegiance to Salazar and his government was more secure.⁵ Salazar rewarded his military supporters with important positions in the state apparatus in order to strengthen his hold on power. Fernando Santos Costa is the best example of this: in 1936, the army captain and one of Salazar's former students was appointed undersecretary of state, and then, in 1944, war minister. Nonetheless, Salazar never achieved total control of the military in the same way Franco did. His authority continued to be periodically questioned to the extent that senior military officers led most political opposition movements: José Norton de Matos (1948), Manuel Quintão Meireles (1951), Humberto Delgado (1958) and Craveiro Lopes (1958–62).

THE IMPACT OF NATO MEMBERSHIP

During the Second World War Salazar opted to declare neutrality and facilitate the action of the Allies. This strategy sought not only to honour the alliance with the United Kingdom but also to gain support among the senior ranks, which were traditionally pro-British and who considered Portuguese military material capabilities clearly insufficient to undertake an active role in the war (Ferreira 1992: 203). Due to its collaboration with the Allies, the strong anti-communist stance of its government and strategic value of the Azores and its overseas ports in the context of the Cold War, Portugal was asked to become a founding member of Nato. The position of the armed forces was clearly in favour of Nato membership (Nogueira 1980: 142–44) and Salazar saw an opportunity to finally consolidate their subordination.

The integration into the Alliance in 1949 had special importance not only in terms of coordination and operational capacity but also in terms of civil-military relations. Nato pushed the regime to adapt its defence structures and multiply the contacts with members of other more modern armed forces at different levels. The armed forces were reorganized within the new defence ministry. Nato allies, particularly the United States, supplied weapons and materials and contributed to the development of a Portuguese defence industry, which facilitated the creation of a new modern expeditionary division stationed in Santa Margarida. Nato introduced a new doctrine, procedures, organizational techniques and methods of action.⁶ It also contributed to the idea that civilians should monitor military and defence issues.⁷

Most importantly, Nato requested improvements in the education and training of military cadres and specialists.⁸ As a consequence many officers were trained by US military staff while others went to military academies in the US and other Nato member states. These officers that had been sent abroad to be trained became known as the 'Nato generation'. Through their international experience, many of them changed their negative opinions about the Western democracies. They soon occupied senior positions and influenced successive generations of officers (Telo 1999: 84–85). The hundreds of officers trained abroad later trained thousands of other Portuguese officers,

4. Salazar personally drafted all documents related to the admission process and requirements for the High Staff Corps (PT/TT/AOS/CO/GR-6, Folder 4, Section 1, p. 223 and PT/TT/AOS/CO/GR-1A, Folder 20, Sections 3–7, pp. 484–94). Even teachers at the Military School were directly appointed by the war minister. See Project of Decree-Law for the reform of the Army School (November 1940, aos/co/gr-1b, Folder 5, Section 14, pp. 301–2).
5. In the 1930s, the young officers who had taken part in the 1926 coup were those who most strongly supported Salazar. These young officers had seen their careers obstructed by the inherited excess of officers from World War I and had blamed the senior ranks for the poor condition in which the Portuguese armed forces found themselves and the country.
6. Regulations, instructions and handbooks with Nato doctrine were elaborated in collaboration with the officers that had attended courses abroad (Report from the Army Chief of Staff Barros Rodrigues, 1 May 1953, PT/TT/AOS/CO/GR-10, Folder 16, pp. 561–62).
7. For instance, Washington vetoed a Portuguese General, from attending the Nato Defence Committee, stressing that the committee had to be composed of civilian representatives (Confidential memo addressed to Salazar, 29 September 1949, PT/TT/AOS/CO/NE-17–1, Folder 4, Section 41, pp. 181–83 and NATO Document, 5 October 1949, PT/TT/AOS/CO/

- NE-17-1, Folder 5, Section 3, pp. 253–56).
8. Internal report of the Army General Staff, 30 June 1953, PT/TT/AOS/CO/GR-10, Folder 16, pp. 563–82.
 9. See references and comparisons to other Nato countries in the General Programme for the reorganization of the army (AHM, Division 1, Section 39, Box 1, Number 1, Document 10).
 10. See for instance, the army report 'The great problems of the army' (January 1958, AHM, Division 1, Section 39, Box 1, Number 1, Document 9).
 11. See Telo (1996) and 'Chronicle of events of April 1974' by Captain Salgueiro Maia in claiming Nato membership was one of the antecedents for the revolution, stating that the closer contact with the outside generated criticisms of the domestic situation (AHM, Division 1, Section 40, Box 1, Number 47).
 12. Captain Ferreira Valença's report 'A Abrilada 1961' (1977) (AHM, Division 1, Section 39, Box 1, Number 1, Documents 1 and 3) describes the unease of the military with the government's stance on the colonies. See, e.g. Rebelo Sousa's letter to Caetano (26 October 1968) (PT/TT/AMC/12-1549) and Caetano's letter to Kaúlza (17 June 1970) (PT/TT/AMC/12-79) which highlights the problems between civilians and the military in Mozambique.

helping them develop a new understanding of their profession as well as new concerns and demands. Many of these officers criticized the regime and participated in opposition movements and conspiracies from the late 1950s. General Humberto Delgado is one of the clearest examples of this. Having spent five years in Washington as a military attaché in the Portuguese embassy and as representative in Nato, Delgado came back to Portugal and became the leader of the opposition to the regime, running for president in 1958. He was later exiled and finally assassinated by the regime's secret police (PIDE – Polícia Internacional e de Defesa do Estado) in 1965 (Cabeza Sánchez-Albornoz 1999).

The speed of the transformations encouraged by Nato slowed down with the outbreak of the colonial wars. The disagreements around Portuguese colonial policy made the United States reduce the number of Portuguese officers in American schools. The United Kingdom, a traditional ally, also expressed discontent with Salazar's colonial stance in relation to the country's Indian enclaves (Oliveira 2007). In 1961 the United States apparently backed defence minister Botelho Moniz's plot against Salazar (Mahoney 1983: 187–222). At the same time, Salazar decided to distance the Portuguese armed forces from the United States and Nato and reduced military cooperation and exchange with them. However, he did not manage to reverse the impact Nato had had on the military. Nato had contributed to diagnosing and revealing the serious structural problems of the Portuguese armed forces.⁹ Nato reforms made the military adopt a more critical stance towards their profession and to government policies.¹⁰ Many young officers lost part of their respect for their superiors and the government that maintained a more outdated vision of the armed forces. Overall, Nato was the cause of a quiet revolution (*revolução serena*) within the ranks, which became one of the triggers for the Carnation Revolution and the overthrow of the regime in 1974.¹¹

GROWING DISCONTENT DURING THE COLONIAL WARS

The colonial wars aggravated the problems of civil-military relations. New corporatist claims, a change in the conception of authority and the heterogeneous composition of the armed forces contributed to the weakening of military discipline during this period. In 1961, Portuguese armed forces surrendered Goa, Damao and Diu to the Indian army and an independence war broke out in Angola. Guinea in 1963 and Mozambique in 1964 followed Angola. The military considered the government plans of maintaining all the overseas territories by sheer force as unrealistic and there were many complaints about the insufficient material conditions, lack of expertise and the negative treatment the regime's propaganda machinery was giving the armed forces, especially after the loss of India. In the colonies, the discontent was amplified by the large gap between the military's and the white settlers' salaries and by the difficulties of working outside the barracks.¹²

The emphasis on personal leadership rather than on hierarchical rank was accentuated during the colonial wars, albeit not to the advantage of the government. The colonial wars were fought by small units, and in most of the field operations there was no officer above the rank of captain. Loyal senior officers generally remained in Lisbon, far from the conflict zones, devoting themselves to administrative tasks. This weakened the authority of senior officers vis-à-vis mid-rank officers who had earned their reputation by fighting. Moreover, some military leaders in the colonies, such as Spínola in

Guinea, Kaúlza in Mozambique and Luiz Cunha in Angola, exhibited *caudilistic* traits and did not follow a strategy fully coherent with government policies (Fernandes 2006: 162–66). The government also lost part of its authority with the replacement of Salazar by Caetano, who did not enjoy the popularity or legitimacy of his predecessor. Unlike Franco, Salazar had made no effort to groom a successor.

The Portuguese military was not as ideologically homogeneous and monolithically supportive of the government as that in Franco's Spain. Different ideological factions existed within the ranks. The sociological composition of the armed forces had become increasingly diverse (Carrilho 1985). The Second World War had entailed massive recruitment and the mobilization of troops stimulating the influx of young militia officers with diverse backgrounds (many from urban areas) and political ideas (liberals, monarchists and socialists). The sociological composition of the Portuguese armed forces further diversified from the late 1950s due to Nato involvement and the colonial wars. Recruitment patterns changed when in 1958 Salazar, following Nato advice, abolished tuition fees in the Military Academy and offered salaries to cadets (Schmitter 1975: 16). Most of the officers who later plotted against Caetano had graduated after 1958 and their socio-economic backgrounds were modest (Porch 1977: 68).

Portugal required a larger army in order to fight the colonial wars. The armed forces grew from 40,000 men in 1961 to 217,000 in 1974; 149,090 men were mobilized in the conflict areas in addition to African regulars and militia forces (Teixeira 2004: 79). An extension of the period of military service was decreed, making military careers a less attractive means of social mobility for middle- and upper-middle-class youth. At the same time, the incorporation of middle- and lower-class officers contributed to the introduction of less conservative ideas that sometimes clashed with those of the regime and the senior ranks.¹³ Moreover, several regulations sought to attract and keep in service the militia officers (*milicianos*). They dominated the lower levels of the officer corps and were composed of many former university students, including some who had been actively involved in left-wing organizations since the 1960s (Maxwell 1995: 37). The dissatisfaction originating in the economic disparities led many military to detach themselves from the government's policies as well as from the white colonial elites, internalizing leftist and revolutionary ideologies and in some cases even sympathizing with the African insurgents.

CAETANO AND THE 25 APRIL COUP

In 1968, Marcello Caetano, former professor and politician, was appointed prime minister after a domestic accident that left Salazar disabled until his death in 1970. Caetano's reform plan, 'renewal in continuity' (*renovação na continuidade*) aimed at limited liberalization in order to revitalize the New State (González Hernández 1999: 34–35; Sánchez Cervelló 1993: 22–31). Caetano legalized some opposition movements, increased the powers of the National Assembly and, emulating Spanish governments, gave preference to civilian technocrats over the military in his governments. Following the Spanish model of the 1960s, in 1971 Caetano recruited a new generation of technocrats, the 'new layer' (*a camada nova*) in order to reform the economy and political institutions. Policy-making became a more collective responsibility and the Council of Ministers gained relevance during Caetano's rule (Graham 1983: 224). However, these reforms were superficial and did not substantially

13. For instance in a letter to the defence minister, the undersecretaries of state of the air force, Kaúlza, and the army, Almeida Fernandes, warned about the process of 'proletarianization' (24 June 1958) (AHM, Division 1, Section 39, Box 1, Number 16).

14. The publication of General Spínola's book *Portugal e Futuro* in February 1974, in which he criticized the government, exemplifies the dwindling support for the regime from the senior ranks and the weakening of information control. Spínola and Costa Gomes were demoted for refusing to take part in a public act of endorsement of Caetano by senior officers on 14 March 1974 (the so-called rheumatic brigade [*brigada do reumático*]).

15. See for instance letters of complaint sent to Caetano by army officers from Guinea-Bissau (signed by 45 officers on 28 August 1973) and from Mozambique and Evora (signed by almost 200 officers, dated 13 September 1973) (AHM, Division 1, Section 40, Box 1, Number 4). See also the 'Chronicle of events of April 1974' by Captain Salgueiro Maia (AHM, Division 1, Section 40, Box 1, Number 47)

modify the regime (Graham 1993: 15; Lucena 1976: 185). The power struggles between different political streams weakened Caetano's authority (Fernandes 2006: 169–70; Rebelo de Sousa 1990: 66). The half-hearted reforms served to stress the latent contradictions of the New State and to point out that the radical substitution of the regime was the only solution to the institutional crisis (González Hernández 1999: 39).

Thirteen years of colonial wars in Africa had contributed to eroding support for the New State from some sectors within the Church, business and intellectual elites (Sánchez Cervelló 1993: 20–21; Alexandre 2006). However, for Caetano, the most difficult challenge was to maintain the armed forces under control (Antunes 1985: 27). Caetano was less involved in the appointment of military chiefs than Salazar (Matos 2004: 175) and did not manage to control many of the important military leaders, including the president, Admiral Américo Tomás. Tomás was leader of the conservative faction, supporter of a strong stance on the colonies and responsible for Caetano's appointment as prime minister (Fernandes 2006). Caetano's government failed to respond to military claims and to settle the colonial conflict. During his rule the corporatist claims and discontent grew drastically. The military requested rights of association, increased salaries and pensions, earlier passage to the reserve, free public transport, longer holidays, better conditions for veterans disabled during the colonial wars, pensions for children and widows, elimination of the Senior Staff Corps (which was perceived as a caste system), and a better selection process in the Military Academy. Many of them, such as the influential generals Costa Gomes and Spínola, tried to transform the inevitable military defeat into a political victory and requested a political solution along the lines of British and French decolonization processes.¹⁴ That solution may have reduced the levels of discontent in the armed forces and prevented the coup. However, in order to please the reactionary camp, Caetano chose to ignore those claims and sacked the reformist officers (Manuel 1995: 28).

An increasing number of episodes of military indiscipline due to disagreements with the colonial wars and corporate grievances took place during Caetano's rule. The enactment of the Decree-Law 353/73 on July 1973, which aimed to enhance control of the armed forces by granting privileges to conscript officers, became a landmark in the deterioration of civil-military relations. The decree fostered academy officers' discontent and internal fragmentation. A month later Decree 409/73 amended Decree-Law 353/73 but due to the continuation of protests it had to be finally revoked in October.¹⁵ This incident showed Caetano's weakness and inability to introduce changes in his military strategy. The government's legitimacy was questioned and the loss of control of the situation was evident. Decree 353/73 became an excuse for the organization of career officers' reunions in which the possibility of a military coup to end the dictatorship gradually became evident. The best-known examples of this were General Kaúlza's right-wing conspiracy, neutralized in December 1973 and, most importantly, the left-wing coup of the Armed Forces Movement (MFA – Movimento das Forças Armadas) which finally overthrew Caetano.

The MFA, constituted in September 1973, was a clandestine progressive movement of junior officers who conspired against the regime and triggered the events of the Carnation Revolution. Initially, the MFA demanded Caetano revoke Decrees 353/73 and 409/73, increase military salaries and reconsider colonialist positions. However, in the MFA meeting in December 1973 in Óbidos, some began to call for military intervention. Thus, captains

Vasco Lourenço and Otelo Saraiva de Carvalho were assigned to preliminary preparations for a hypothetical coup. On 5 March 1974, 200 MFA members met in Cascais and approved Major Ernesto Melo Antunes's document 'O Movimento, as Forças Armadas e a Nação' ('The MFA and the Nation'). The manifesto outlined a political programme known as the '3Ds': democracy, development and decolonization. Caetano's government failed to meet their demands. Changes in the military strategy were constrained by the highly legalistic institutional framework that slowed any reform and precluded more energetic actions to counter the imminent upheaval (Maxwell 1995: 44). On 16 March, some soldiers rebelled in Caldas da Rainha, 150 of them were arrested. On 24 March, the MFA tasked Otelo with planning the military operations for a coup. Caetano underestimated the capacity of the rebels and tried to use them as a threat to counterbalance the influence of the reactionary groups that had obstructed almost any type of change in policies (Manuel 1995: 26–27; Opello 1985: 65–80). Declassified documents from the International and State Defence Police/General Security Directorate (PIDE/DGS – Polícia Internacional e de Defesa do Estado/Direcção-Geral de Segurança) show that Caetano had information about the coup attempt at least one week before 25 April (Porch 1977: 80–87; Opello 1985: 65–80; Manuel 1995: 26–27).

The coup eventually took place on 25 April 1974. Otelo led an operation carried out exclusively by junior officers. The MFA took control of Lisbon airport, radio and television broadcast centres, and the military headquarters in Lisbon and Oporto. Troops were moved all over Portugal to give the impression of a general uprising and the borders with Spain were sealed to avoid any kind of intervention by Spanish troops. This well-planned operation quickly succeeded. Caetano surrendered to General Spínola at the GNR headquarters in the Largo do Carmo in Lisbon. Many people came out onto the streets to celebrate the fall of the regime. Some clashes between police and youths took place before the morning of the 26 April when the secret police headquarters, the last centre of resistance to the revolution, surrendered. Five people died as a result of gunfire from the DGS, these were the only victims of this otherwise peaceful revolution (Porch 1977: 90–93; Robinson 1979: 191–93). The New State had been overthrown by the same body that had enabled its creation: the military.

CONCLUSIONS

This article has shown that the military played a central role in most major political transformations in Portugal during the nineteenth and twentieth centuries. The overthrow of the New State in 1974 was not an exception but the continuation of a trend of military interventionism that had started at the end of the age of absolutism. The military was never submissive vis-à-vis the civilian authorities and remained a source of concern for governments and political elites throughout the entire period analysed. Even after the fall of the New State the military were reluctant to give up their ability to shape political outcomes. They controlled the transition to democracy, and it was not until the abolition of the Council of the Revolution and the constitutional reform of 1982 that the military finally accepted civilian supremacy and focused exclusively on their defence function.

Although the Portuguese armed forces were always ready to intervene in politics during the periods studied, the triggering factors, as well as the nature and intensity of their participation, evolved. After the Napoleonic Wars the

military took a leading role in a process of regime change. The Napoleonic invasions and subsequent British protectorate had revealed weaknesses in the power structures in Portugal and the need for institutional change. Ideological polarization between liberals, who wanted to profoundly reform the state, and absolutists, who sought to restore the *ancien régime*, hindered political agreements and the implementation of reforms. Both factions relied on the military to impose their views. The Civil War (1828–34) provides the clearest illustration of this confrontation. The instrumentalization of the military by contending factions also contributed to their politicization. The participation of the armed forces in politics was not transient. The military evolved from political tools to independent political actors. The continuous *pronunciamentos*, the involvement of the armed forces in the drafting of laws and constitutions, as well as the fact that most governments were led by senior officers show that, in addition to the politicization of the military, Portugal experienced a process of militarization of politics.

After 1870s the military gradually distanced itself from the political parties and reduced its direct involvement in domestic affairs. Nonetheless, the colonial stance of the government, which had to cede to British pressures and limit the expansion in Africa, became an important source of discontent. Military coups became less frequent than before, but new republican and nationalist ideas flourished in the ranks. The erosion of the monarchy and the rotating political system in place led to the 1910 revolution and the advent of the republic. This change of regime created once more a window of opportunity for the return of the military to the front line of politics. The military was quickly disillusioned by the political instability and institutional weakness and its interventions increased, some seeking revolutionary reforms, others to restore the monarchy. The First World War revealed the serious deficiencies in the Portuguese armed forces. The military realized that, in comparative terms, it was very poorly equipped and trained and that it was more effective fighting domestic enemies than external threats.

The republic was replaced by force by a military dictatorship in 1926. However, the patent inability of the military in government to solve Portuguese problems made it voluntarily hand power over to Salazar. The facade of stability and endurance of his regime, the New State (1932–74), conceals a much more volatile reality in terms of civil-military relations. The military, which had initially appointed Salazar and granted him extensive powers, never completely accepted a subordinate role. Their latent interventionist thrust was frequently activated by political disagreements and unfulfilled corporatist claims. Salazar managed to neutralize all plots against him, but did not succeed in reversing the process of disaffection with the regime triggered by Nato membership and aggravated by the colonial wars. Again, contact with foreign armed forces had raised the awareness of the precarious working conditions of the Portuguese military. Moreover, the Portuguese military was quickly becoming more sociologically and ideologically heterogeneous. Many officers began questioning the political regime and its unrealistic stance on the colonial question.

Caetano, who was perceived as a much weaker leader, did not substantially change the policy direction. The prospect of a positive outcome in the colonial wars seemed increasingly remote. Most importantly, after the processes of decolonization by most Western powers, many officers questioned the legitimacy of Portugal's stance on its African territories. The damaging economic impact of these wars on Portuguese finances made it extremely difficult to supply the much larger army required to control the colonies. The military

had to continue fighting regardless of its inappropriate material resources and training. Some of Caetano's military policies, such as those seeking to attract and retain militia officers, fostered discontent among academy officers. The military decided to overthrow the regime, give up the colonies and focus on leading the transition into democracy.

Thus, the Carnation Revolution was not simply the result of a particular context of systemic failure and pressures from social movements, disenchanted elites and international actors. It was also the consequence of a long tradition of military interventionism deeply entrenched at the conceptual and institutional levels. Factors such as political instability and polarization, disagreements over foreign policy, the use of the armed forces against internal threats and deficient equipment and preparation nurtured the inclination of the military to interfere in politics. After the Napoleonic Wars the military never retreated completely to the barracks. Military interventionism was either overt or remained latent until historical junctures such as changes of regime and wars activated it.

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