

Social cleavages in the last Portuguese colonial empire

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Abstract

Social cohesion in the Portuguese colonial empire is approached through the perspective of interracial marriages for the 1940s and 1950s. The paper presents the institutional background and Government philosophy on equality and non-prejudice within all of the territories under Portuguese sovereignty, and tests if marriage and race were independent variables using annual data from Yearbooks regarding the colonies.

Conclusions demonstrate a social prejudice, particularly in the Asian colonies. The paper supports the belief that social divisions based on ethnicity must be added in explaining decolonization and independence.

Characters: 48476

Key Words: Colonialism, Inter-racial Marriage, Social Cleavages, Portuguese last colonial empire.

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The Government philosophy on cohesion for the last Portuguese Empire

In the last phase of the Portuguese empire (1940s-1970s), the Government political philosophy for sociability in colonial territories was based on a large propaganda about the respectful relationship of the Portuguese with any other people in the colonial empire along the world. According to political speeches, Portugal was a vast and great nation. It stretched its domain and sovereignty over a vast and wide range of territory that was distributed along all the continents on the surface of the planet. This was a supreme mission to be accomplished, according to J. M. da Silva Cunha, a Salazar' Secretary of State, later on appointed as Minister of the Overseas: "Providence led Portugal into the mission of bringing all peoples of Europe and other continents together, taking to them the Christian message along with European civilization".¹

It was an honorable nation, who discovered the whole world, departing from Portuguese coasts. This heritage was still present in the Portuguese Empire, made up of a mainland territory in Western Europe, four archipelagoes in the Atlantic (Madeira islands, Azores, Cape Verde and São Tomé and Príncipe), Angola and Mozambique in the African continent, several territories in India, a pearl near China, which was Macau, and the territory of Timor in the Pacific Ocean. So, the Portuguese territory was comprised of several provinces, beginning in the Northern mainland province of Minho (near the Spanish Galiza) and reaching all the way to the antipodes, in Timor.

Also according to the Governmental language, the Portuguese people were a cohesive nation, speaking the same language, Portuguese, sharing the same faith, Christianity, working under the same political rule, the Portuguese administration, taking pride in the same flag, the Portuguese flag, that was unfurled in all the national territory on every continent. There were no ethnic conflicts: "We arrived where we are now, more than five centuries ago, to spread Christianity and to remain".² School children were taught that all Portuguese were equal. Whatever might be their birth, their geographical origin, or the color of their skin, they all were equal. As Cunha, 1964 puts it: "So, since the beginning we considered Africans as our equals, in this way eliminating all racial discrimination".³

The Portuguese culture was a single culture, it was said. Even considering that local conditions might be different, official ideology always stressed that although they might differ, there were no superior or inferior cultures. Miscegenation should be the rule, as nineteenth-century literature accused Portugal of a weakness for colonization stemming from miscegenation: "(...)

specialized literature of the nineteenth –century and beginning of the twentieth (...) accused us of a colonizing disability (as was said at the time), because we could not preserve the purity of our race”.⁴

So, the Portuguese nation, according to the government, was a multi-continental, multi-racial unit based on a Portuguese identity of moral and political elevation: “Portugal will go on being integral with her own features of a State and multi-continental Nation, made up of the most varied ethnicities”.⁵ Even scholars and academics shared a good deal of this vision. According to Boxer (1961) “It is to the credit of Portugal (...) she made no distinction of race and COLOR and that all her subjects, once they have become Catholics, were eligible for official posts.”⁶ Although abandoning the thesis of the unanimous religious faith, a Portuguese Professor of Economics could write in an academic work: “We created along five centuries – the most extraordinary, multi-racial, national community of all times, in which merit comes from the value of the human being and not from the color of the skin. (...) Historically and currently the Portuguese nation is, as a consequence, a mosaic of multi-continental, multi-racial populations with religious diversity”.⁷

Sometimes a “civilization” argument was added, and contradictions about the “non-superior character” of some cultures clearly appeared: “If the Portuguese policy for human relationships in the Overseas territories is impressive because of the vastness of the territories where it applies, it is most impressive because of the purpose of transforming aborigines into Portuguese, as Portuguese as anyone born in mainland Portugal, as it is moral and social elevation that takes them into a Lusitany, for a complete integration in the Nation”.⁸

It is a fact that Portugal had one of the far-reaching set of colonies in world history and the Portuguese had a reputation for particularly integrative and intimate relations with the indigenous groups that were colonized. In order to unify all of the territories under the same juridical rule, with the same status, and to prove that they were considered as a homogeneous territory, each one of the colonies was designated as a province, an institutional status introduced in the constitutional reform of 1951.⁹ In this new institutional framework overseas provinces and mainland provinces were partners in the same empire. However, was this official dominant speech reflecting the truth? Can we believe in this perspective for the Portuguese colonial empire in the period after the Second World War? The aim of this paper is to test the accuracy of the official language in political speeches during these decades, by observing how different kinds of local cultural cleavages led to different social experiences of inter-racial marriage among the territories.

Concerning culture, education and ethnicity, heterogamy and miscegenation were two main aspects to be observed in Portuguese colonial territories. This paper observes that social cleavages can help to explain how there was a lack of cohesion in the Portuguese Empire. Independence also makes much more interesting the study of ethnic and social cleavages in so many countries, having such different features and geographical locations, while sharing a common Portuguese colonial past. For all of them, the paper aims to shed some light for studying them today.

Fractionalization in Portuguese colonial societies (from the 1940s to the 1960s).

A small and thinly-spread white bureaucracy began ruling and representing the central power of the distant mother country along the first half of the twentieth century. Slow economic growth in Portugal could not provide enough financial resources for either the private or public sector to invest in the colonies. However, during World War II, when prices for colonial goods became rewarding again and the Portuguese economy picked up, the mother country moved towards sustainable economic modernization. As a result, relationships between the colonizers and those colonized blossomed into a closer sociability. From this perspective, it is possible to concentrate the analysis of the Portuguese peaceful administration of this last colonial empire in the period coming from the 1940s to the 1970s, which includes the faster economic growth experienced along the Golden Age until the first oil shock of 1974, and a general trend towards decolonization for all the other European colonizers.¹⁰

Because of the huge differences in location and size, each of the eight Portuguese colonies formed a separate administrative, economic and political unit, with its own laws, currency, taxes and customs. Although a common institutional framework existed for the whole empire to rule the territories from a juridical and political point of view, different social developments unfolded from the 1940s until decolonization in the 1970s. Splendid statistical information is available for this period. Three Censuses, from 1950, 1960 and 1970 contain long databases on the Portuguese colonial empire. Recall that during this period the ‘winds of change’ began to blow over Colonial Empires.¹¹ The Portuguese response involved a constitutional change in 1951. References to Colonial Empire and colonies were formally dropped from official texts. Overseas provinces became the official terms to designate the non-European territories under Portuguese sovereignty¹². At the same time, the economic situation of Portugal proper and its “overseas

provinces” improved, and the only loss was the occupation of two small Indian territories (Dadrá and Nagar-Aveli) by India in 1954.

Territories were quite different in size. Note that Angola, the largest territory, was fourteen times the area of mainland Portugal. Mozambique was about seven times the area of mainland Portugal. Guinea was about half the area of mainland Portugal while the other colonies were small spaces. Population and demographic density were also quite different, as Table 1 shows. In the same way, they were made of different cultures and peoples.

Table 1- Population and demographic density of Portuguese colonial territories in 1950

Territory	Cape Verde	Guinea	São Tomé and Príncipe	Angola	Mozambique	India	Macau	Timor
Total resident population	148,331	510,777	60,159	4,145,266	5,738,911	637,591	187,772	442,378
Inhabitants per km ²	36.8	14.2	62.4	3.3	7.3	160.0	11,045.4	23.3

Source: Portuguese Yearbook, 1950, vol. II.

Fragmentation was quite evident in the Portuguese colonial empire of the twentieth-century, but it also was different from one territory to another. There was no legal discrimination by race in any place of the Portuguese Colonial Empire, but that did not mean that everybody had the same legal status. Although formal political speeches stressed that all citizens were equal, the available official statistical sources present data according to race and “civilization”, even if in a disguised way. Everywhere, except in Cape Verde, there was a distinction between citizens that lived according to standard Portuguese law and people that lived according to particular regimes. In the African colonies and Timor, this took the form of a distinction between *civilized* and *indigenous* inhabitants. People of European origin and literate natives working for the Portuguese administration or in the modern sector of the economy (the so-called *assimilados*, assimilated) enjoyed civilized status, corresponding to full citizenship. Illiterate natives, especially those still living in the framework of traditional tribal societies, were ruled according to the particular indigenous regimes.

The Statistical Yearbooks for the Colonial Empire consider “civilized”, “uncivilized” and “assimilated” categories and also distinguish ethnicity using the label “somatic groups” (*grupos somáticos*). Table 2 A and B present the data for 1950, according to both classifications, the largest categories indicated in boldface, while Table 2-C reports the weight of *civilized*. No definitions are presented to characterize these categories individually. This fact may mean that they were quite obvious at the time, and “understood”. Very probably, the color of the skin was the basis for this classification, because this is the most important reason for defection: “ethnic cleavages based on differences in skin color and other physical characteristics should be almost perfectly defection proof, as such physical differences offer very low-cost devices to detect infiltrators”.¹³ This interpretation was discussed for other Colonial Empires. For British India, for example, Alison Blunt writes that “although Anglo-Indians were “country-born” and domiciled in India, many imagined Britain as home and identified with British life in India. (...) I argue that ideas of Britain as home were intimately bound up with ideas of whiteness”.¹⁴

According to other literature, “conflict is more likely when the characteristics that distinguish the ethnicities are more difficult to change”.¹⁵ In fact, while differences in religion may be overcome through conversion, and differences in language may be improved through learning the language, differences in skin color are insurmountable, and may have underlay very difficult and costly attempts toward assimilation.

Table 2- Fractionalization in Portuguese colonial territories in 1950, according to the Portuguese Yearbook, 1950, vol. II.

A- Racial composition of total population

Territory	Cape Verde	Guinea	São Tomé and Príncipe	Angola	Mozambique	India	Macau	Timor
	%	%	%	%	%	%	%	%
“Somatic group”								
“White”	2.0	0.4	1.9	1.9	0.8	0.1	1.4	+0
“Mestiços”	69.6	0.9	7.1	0.7	+0	+0	1.0	0.5
“Negroes”	28.4	98.7	90.9	97.4	98.5	+0	+0	+0
“Indians”	+0	+0	+0	0	0.2	99.8	+0	+0
“Yellows”	0	0	+0	+0	0	+0	97.5	0.7
“Timorese”	0	0	0	0	0	0	+0	98.7
Other or unknown	+0	0	0	+0	0	+0	+0	+0
	100	100	100	100	100	100	100	100

B – Racial composition of the category “Civilized”

Territory	Cape Verde	Guinea	São Tomé and Príncipe	Angola	Mozambique	India	Macau	Timor
	%	%	%	%	%	%	%	%
“White”	2	27	3	58	52	+0	1	8
“Mestiços”	70	55	10	19	27	+0	1	27
“Negroes”	28	18	87	22	5	+0	+0	+0
“Indians”	+0	+0	+0	0	14	100	+0	1
“Yellows”	0	0	+0	0	2	+0	98	42
“Timorese”	+0	0	0	0	0	0	+0	21
Other or unknown	+0	0	0	+0	0	+0	+0	1

C - Weight of “Civilized in Total Population”

Territory	Cape Verde	Guinea	São Tomé and Príncipe	Angola	Mozambique	India	Macau	Timor
	%	%	%	%	%	%	%	%
Weight of “Civilized in Total Population”	100	2	72	3	2	100	100	2

Source: *Anuário Estatístico, Império Colonial*, 1950.

Of course, some ideological background might exist in the definition of these categories and their identification for inclusion in Statistical Yearbooks. Cultural elements also were present, certainly, in defining marginal cases. As for the distribution of population by somatic groups, tables in Statistical yearbooks consider six classifications, in spite of the official rhetoric of the government: white people (*brancos*), mixed (*mestiços*), blacks (*negros*), yellows (*amarelos*), Indians (*indianos*), and Timorese (*Timores*).

The “white” category would include people from Mainland Portugal or other European countries. Would it include people having a distant miscegenation? Very probably yes, while the “mestiços” included all mixed people, most probably those whose miscegenation was more recent and visible. The “negroes” group included native African people. Did it include mixed people also? This is a difficult question, as we know how variable its meaning is in current societies. If we compare the Brazilian meaning of “negro” or “mixed” with the prevailing meanings in the USA or in South Africa, a wide range of difference is obvious. “In fact, the word “mestizo” as it is used in Spanish America does not translate well into Portuguese, for in Portuguese a “mestiço” can be any mixture. In the case of Brazil, it can mean either a descendant of Indian-European parents or of

African-European parents”, says Nazzari, 2001.¹⁶ According to Telles, 1995, in Brazil “structural inequalities are particularly great between whites and non-whites compared to between browns and blacks”.¹⁷ The category of yellow was reserved, very probably, for people having a Chinese link, as their weight is almost absolute in classifications in the territory of Macau and very scarce in all other territories, thanks to a relatively low mobility among the territories before the colonial wars. To what extent did this classification of “yellow” include mixed people? As the statistics for the territory of Macau value for “negros” and “mixed” people, this may mean that all the miscegenation with “yellows” was lumped into the same category of “yellow”. People from Timor or neighboring regions were classified as “Timorese”. Did this classification of “Timorese” include mixed people? Just as in Macau, the statistics refer to the presence of “mixed” (probably from blacks). So, very probably miscegenation with Timorese was considered in the group of “Timorese”. Anyway, if these were the used classifications they surely reflected the social divisions according to the mental background of those societies at that time. In one way or another, the use of these categories is unavoidable in this paper.

Fractionalization among these groups was quite different among the Portuguese colonial territories, as the table shows. In a brief summary one can see that white people never represented more than 2% of the total population. Numerically dominant categories are the natives of each territory: *negros* in Guinea, São Tomé and Príncipe, Angola and Mozambique; Indians in India; Yellows in Macau, Timorese in Timor, and “mestiços” in Cape Verde, which is the territory showing the largest miscegenation, by far.

Another main conclusion can be drawn.. Among residents in Cape Verde there are no Asians (Indians, Yellows or Timorese). In Guinea there were no Indians and no “Timorese”. Negroes represented 99% of the population and miscegenation was very scarce. In the islands of São Tomé and Príncipe, miscegenation was significant: “Where miscegenation was practiced as a matter of Crown policy at an early date was in the island of São Tomé”.¹⁸ This archipelago was not inhabited when Portuguese navigators visited the two islands for the first time in the 15th century and tended to share the characteristics of the continental African colonies. Since the nineteenth century this colony had been devoted to farming for the production of cocoa, using Angolan labor force. As the return was not assured, miscegenation in the islands attained 7% of “mestiços” in 1950 and represented middle class and administrative services, while the white population, made up of landowners and senior staff of local government, was residual. In fact, these “somatic

groups” represented a real ethnic fractionalization in Portuguese colonial societies: “race (...) and class are not distinct realms of experience, existing in splendid isolation from each other”.¹⁹

As for the definition for “uncivilized”, it is said that it includes those “who preserve a traditional African culture”, while the “assimilated” are those “who totally or partially adopted a Western European culture”. In practice, only a small minority enjoyed civilized status in the Portuguese colonies. In 1950, figures amounted to 8,000 in Guinea (less than 2% of the population), 135,000 in Angola (less than 4% of the population), 93,000 in Mozambique (less than 2% of the population), 7,000 in Timor (less than 2% of the population). São Tomé and Príncipe was a partial exception with 43,000 civilized people (around 72% of the population). As pointed out above, there was no indigenous status in Cape Verde. The same was true in India and Macau, but most of the population did not live according to standard Portuguese law, as there were special regimes for Hindus in India and for Chinese people in Macau. The classification was therefore used for five territories (Guinea, São Tomé and Príncipe, Angola, Mozambique and Timor), but it did not apply to the other three colonial territories (Cape Verde, India, and Macau), where all people were considered “civilized” for statistical purposes. This was a general consensus in the Portuguese society of the time, as we can read: “(...) in India the designation of “indigenous” never applies, as this word is appropriate, in its technical-juridical meaning, to the backward populations of Angola, Mozambique and Guinea. In India there never were “indigenous”, under the legal meaning of the word; they are all citizens, even the most uncultivated”.²⁰

Curiously, the same applied in British India. Indians were considered civilized. The community of mixed people from British/Indian parents, the so-called Anglo-Indians, was defined as “Statutory Natives of India” and “for defense and education were classified as European”.²¹ The mixed Anglo-Indian community of about 300,000 persons in the 1940s, 100% literate, was considered reliable, and people had access to the Indian Defense Force, for example. Sons of British fathers went freely into the “covenanted ranks of the British services and reached the highest positions of trust and responsibility” while 80% of nursing services were provided by Anglo-Indian women.²²

In all Portuguese colonies the army recruited local soldiers. People from Cape Verde, India and Macau also had frequent access to the highest functions in the bureaucracy or in private activities, as some of them were even very eminent and erudite: Ministers, officers in the Army or the Navy, magistrates, professors in Universities, doctors, priests, scientists, and diplomats,

according to Godinho, 1954. There may be two reasons for this: high miscegenation or the hegemony of a different culture and civilization. The explanation related to the reason “miscegenation” applies more to Cape Verde. It was settled by a mixture of European colonists and African slaves, and became thereafter the main base for Portuguese contacts with the nearby coasts (Guinea proper and the Gulf of Guinea, respectively).²³ Cape Verde developed a mixed population with its own language, a creole of Portuguese and Guinea languages and 70% of the “civilized” people were “mixed” people. A higher level of education prevailed in the islands of Cape Verde as well. Cape Verdians mostly occupied the available administrative positions in their islands, in Guinea and in other African territories.

The reasons related to the dominance of different civilization and cultures apply much more to Portuguese India and Macau. People from India and Macau were respected because of the sophistication of the Indian and Chinese civilizations, respectively, and their role on mentalities in these territories. In Goa and Macau, an elite comprising people of European origin and natives who had converted to Christianity, formed the dominant social stratum and manned the administration of the other Indian territories and Timor. The bulk of the population remained linked to Hindu, Chinese and Timorese cultural traditions and languages (Concani, Cantonese and Tetum, respectively).

While in São Tomé and Príncipe 72% of the population was considered “civilized” in Portuguese statistics, in Guinea, Angola, Mozambique and Timor only 2 to 3% of the population was counted as such.

For a better understanding of the “civilized” category, educational levels should be considered, too. Crossed classifications with educational levels are too scarce. Only for two colonies – Guinea, and Mozambique – can one find information on education for the total population. However, it is not enough to conclude that choking asymmetric levels of literacy existed in these two colonies, and a very small number of graduated people lived there (as table 2-D shows).

D – Educational composition for total population in 1950

Territory	Guinea	Mozambique
Education	%	%
Illiterate	99	28
Reading abilities	+0	1
Reading and writing abilities	+0	39
Primary school	1	25
High school	+0	6
University	+0	1

Source: *Anuário Estatístico, Império Colonial*, 1950.

It would be desirable to have details on the educational levels of each “somatic group”. Unfortunately, data on education for Portuguese colonies is not disaggregated according to the “somatic groups”. Curiously, only for the white people, can one find educational information (including the territory of Macau), which must be for one of two possible reasons: 1- All categories of literate people were related with “white” people; 2- Inquiring difficulties or racial prejudice hampered the collection of statistics in the Portuguese Empire.

The first hypothesis is not true, although values certainly would be very low for some other somatic groups, particularly for blacks (“negros”). The second explanation must, therefore, apply. The two territories of continental Africa - Guinea and Mozambique - had developed in the late 19th century from trade factories established on the coast in the 15th or 16th centuries. Although in both of them the bulk of the population remained linked to traditional culture and languages, the presence of large private companies in Mozambique may explain the stronger connection to markets and literacy. A small elite of European, Cape Verdian (in the territories of West Africa, especially in Guinea), and Goese (in Mozambique) origin joined the dominant social stratum and manned the administration.

E – Educational composition for “white” people in 1950

Territory	Guinea	Mozambique	Macau
Education	%	%	%
Illiterate	24	15	7
Reading abilities	1	+0	93
Reading and writing abilities	7	38	+0
Primary school	43	34	+0
High school	21	10	+0
University	4	3	+0

Source: *Anuário Estatístico, Império Colonial*, 1950.

One may see that large asymmetric levels also existed among “white” people in the empire and most of the graduated people were “white” (from Table 2-E). Of course it is important to remark that the dominant writing in Macau was Chinese and statistical criteria reflect the use of western writing.

Marriage as an indicator of social cleavages

According to Stoler 1997 “Imperial discourses that divide colonizer from colonized, metropolitan observers from colonial agents, and bourgeois colonizers from their subaltern compatriots designated certain cultural competencies, sexual proclivities, psychological dispositions, and cultivated habits. These in turn defined the hidden fault lines (...) along which gendered assessments of class and racial membership were drawn”.²⁴ Fractionalization meant social fragmentation, even where institutions tried to overcome conflicts or at least mitigate cleavages.²⁵ Law is a very important institution to address potential social conflicts. However, whatever may be the juridical background to settle existing conflicts social fractionalization may continue if people do not accept differences in everyday life. Literature from economics also stresses how different groups, particularly ethnic groups, may have different preferences regarding which type of public goods to produce in a society.²⁶ In fact, for a given public good, each ethnic group’s utility level seems to drop whenever other ethnic groups also use it. Such a situation introduces considerable difficulties for public choice in economics and much indecision for government and political or administrative authorities. This argument has been used to explain how ethnic division in the African continent can explain such great difficulties in determining a safe economic growth path in present days.²⁷ The more mixed a society is, the fewer effects of this kind will occur. Miscegenation is an excellent way of getting a larger social (and political) consensus. Social (and political consensus) are, therefore, conditions for economic efficiency, economic growth, development and peace and miscegenation contributes toward reducing social tensions.

A large amount of miscegenation in divided societies occurs spontaneously and depends on cultural and moral factors. Portuguese historical experiences in colonization were always strongly marked by miscegenation. The foremost example of miscegenation is the case of the Brazilian empire, which lasted until the independence of this colony in 1822.²⁸ Sometimes miscegenation is

not based on marriage, but on personal relationships having no legal recognition. This seems to be the case of the first Luso-Africans in Angola, according to Miller 1988.²⁹

If, however, a fragmented society experiences a large amount of heterogamy, coalitions' membership is reinforced between the participant groups in mixed marriages. This paper accepts marriage, a special institution, as a very safe solution for attaining social cohesion. . "Anyone (...) knows that marriage is a legal creation."³⁰ Moreover, mixed marriage is a very special institution for this aim.³¹ It is possible to say that sharing public spaces, attending the same schools, applying to the same jobs are good examples of racial sociability. However, the ready example of affability comes from mixed marriages, because of family links of blood among different social/ethnic groups. Violent confrontation among ethnic lines may be prevented, because ethnic cleavages break down. Not only do mixed marriages mean miscegenation, but also strong personal ties of solidarity and love.

Of course miscegenation beyond marriage also may be a focus of segregation and a threat of violence. Legal miscegenation through legal heterogamy, however, represents the public acceptance of differences and the assumption of a personal private relationship with someone who is different. Moreover, as marriage is a juridical relationship that is established within the legal framing system for society, it also bases its economic structure on property rights, in order to legitimize filial descent and inheritance, and it is useless to stress that the role of property rights in society is decisive.³²

It is worth saying that surely homogamy included not only racial prejudice but also educational homogeneity. Available studies show that educational homogamy across cohorts is considerable, both in absolute terms and also when controlling for the general increase in educational levels in recent periods. Usually racial prejudice exists to the extent that it is coterminous with educational homogamy.³³ In adopting this perspective, it becomes clear that intermarriage can also be assumed to be an indicator of social, educational and cultural openness and integration.³⁴

Data

According to data on interracial marriages collected from the Portuguese Statistical Yearbooks on the Portuguese Colonial Empire for the 1940s and 1950s, marriages occurred mainly between people belonging to the same group. In fact, the yearbooks present a map breaking down

marriages according to the “somatic group” of husband and wife in the married couples in each territory (with the exception of Macau) for every year from 1944 to 1960. The vast majority of marriages occurred with connubial partners that were both “white”, “mixed”, “negro” “Indian”, “Yellow” and “Timorese”. Mixed marriages also occurred, although in smaller numbers. It is possible to represent this information using a matrix $\mathbf{A}_{6 \times 6}$ where lines and columns include “White”, “Mixed”, “Negro”, “Indian”, “Yellow”, and “Timorese”.

Elements a_{ii} represent in the matrix homogamic marriages of couples (as husband and wife belong to the same somatic group). All other elements of the matrix, the a_{ij} with $i \neq j$ represent mixed marriages, describing different husband/wife combinations, according to their position in the matrix.

Not only is the whole sample significant, but also the number of marriages that were included in the data represented in each element a_{ij} . The yearbook explains that data were collected from information provided by local administrations in the municipalities of the colonial territories.

The analysis will be performed for each of the territories and not for the whole colonial empire. According to Harris & Ono, 2005, it is incorrect to perform any marriage analysis that disregards the regional aspects, because the market for marriage is local. Opportunities to meet a potential spouse are based on personal networks.³⁵ The test for marriages in the USA for the year 2000 proves the accuracy of this hypothesis. For Portuguese colonial territories this is a decisive aspect, for several reasons. Not only were transports and traveling more infrequent and inefficient, but also geographical discontinuity and cultural diversity requires separate analyses, of course.

It is very relevant to say that from 1960 on, ethnic information on marriages disappeared from the national Statistical Yearbooks. Marriages were presented without any break down by “somatic groups”, and no more reference is made to this characterization. From then on, statistical data reports on the number of marriages and divorces as a whole, in each of the territories. This fact means that the motivation to choose ethnicity as a main factor to describe marriages statistically was considered to be politically incorrect. The label “somatic groups” evoked identity. The expression of somatic cleavages could evoke a perceived threat of conflict in the historical context of the surge of colonial movements that led to the colonial wars.

The samples include hundreds of marriages in each year in the small territories and even thousands of marriages in each large territory.³⁶ It is impossible to distinguish whether any of them refer to second marriages. This means we have information on couples in existing marriages, but

not on previous relationships. The inconvenience, however, may be very small, as divorce was quite rare at that time. A large database of a vast number of observations in each year in each territory from the scores of marriages registered supports the exercise, depicted in annual matrixes for each of the territories. How to manage the data in order to obtain conclusions on social fractionalization of Portuguese colonial society and test the government philosophy on sociability within the Portuguese empire?

Testing the hypothesis of independence between marriage decisions and race.

On observing annual matrixes, it is easy to guess that most marriages in Cape Verde were couples of a mixed husband and a mixed wife, as mixed people were dominant in this territory; most marriages in Guinea, São Tomé and Príncipe, Angola and Mozambique were couples of a negro husband and a negro wife, as negro people were dominant there; most marriages in India, (Macau and Timor) were of couples in which both husband and wife were Indian (Yellow or Timorese), as these were the dominant “somatic groups” in each of these cases. Did the observed number of interracial marriages parallel the proportion of “somatic groups” in each territory?

To study intermarriage patterns it is necessary to provide a method for controlling for population size of each group. This means that the depicted racial mating must be adjusted for the racial composition in the different colonial territories. For this purpose contingency tables E were calculated.

$$e_{ij} = \frac{\sum_{j=1}^n a_{ij} \cdot \sum_{i=1}^k a_{ji}}{\sum_{i=1}^n \sum_{j=1}^n a_{ii} a_{jj}}$$

Estimations provide what should be the number of marriages of each kind of husband/wife combination, supposing that the probability of marrying with someone from any “somatic group” was equal. The hypothesis corresponds to no social prejudice (the government’s rhetorical philosophy).

The comparison with data through the calculation of the bias defined as

$$\sum_i \frac{(a_{ij} - e_{ij})^2}{e_{ij}} \approx \chi^2_{(i)}$$

provides the χ^2 test to the hypothesis of independence between race and (the observed) decisions on marriage.

The bias proves that race and decisions on marriage were not independent variables with probabilities ≥ 0.99 for the confidence margin, for all the Portuguese colonial territories. One important analytical aspect deserves to be mentioned. As some “somatic groups” were very small in some territories -particularly the whites - there is a bias in the statistical conclusions on exaggerating the estimated probabilities. Be that as it may, one may take for certain the non-independence between race and decisions on marriage in the Portuguese colonies.

The startling finding emerges that not only were the proclaimed political aims of race equality wrong (or at least, not practiced), but also that the data show high preferences for homogamous marriages in all of the colonies, as well as ranking preferences for races.

It is also interesting to note that data in matrixes **A** show that men are much more willing to marry someone from a different “somatic group” than are women. In fact, as columns represent men and lines represent women, we can see that values are much more spread along columns than along lines. This fact is already noticed in Boxer 1961 for the Brazilian colonization: “The French circumnavigator, Le Gentil de La Barbinais, who stayed for some months at Bahia in 1718-19, was scandalized by the local citizen’s preference for a colored woman even if a white woman was available”.³⁷

This means that heterogamous decisions belonged much more to men than to women in a world where “European men were the most direct agents of empire”.³⁸

Building an indicator for social cohesion

A different aim may be to get a glimpse of social cohesion, measured through blending of races by marriage as a social institution, by considering the weight of mixed marriages in Portuguese colonial societies.

According to the described data, a homogamous indicator may, thus, be calculated as a proxy for social cohesion. Consider the squared matrix **A**, above, describing the observed marriages among ethnic groups in a territory in a given year. As the diagonal of the matrix, made up of the elements a_{ii} , contains the number of marriages *intra*-ethnic groups and the other elements of the matrix describe the marriages *inter*-ethnic groups, the index **I** defined as

$$1 \geq I = \frac{\text{tr}A}{\sum_{i=1}^n \sum_{j=1}^n A_{ij}} \geq 0 \quad \text{with} \quad \text{tr}A = \sum_{k=1}^n A_{kk}$$

measures the proportion of mixed marriages. It varies from 0 to 1 (zero if all marriages were mixed and 1 if all were between persons belonging to the same ethnic group). So, for an indicator of social cohesion, we shall consider

$$1 \geq 1 - I = 1 - \frac{\sum_{k=1}^n A_{kk}}{\sum_{i=1}^n \sum_{j=1}^n A_{ij}} \geq 0 ,$$

which measures the proportion of mixed marriages in society, also varying from 0 to 1 (zero for no cohesion resulting from the absence of marriages *inter*-ethnic groups, 1 for the maximum cohesion resulting from the absence of marriages *intra*-ethnic groups).

Indicators of social cohesion (1 – I) were estimated for all of the years for each colonial territory. An overall indicator for the whole period for each territory was calculated in Table 3 from the average of the estimated indicators for each territory.

Table 3 – Average indicator of Social Cohesion in Portuguese Colonial Territories

S.Tomé							
and							
CapeVerde	Guinea	Príncipe	Angola	Mozambique	India	Macau	Timor
0.15	0.05	0.10	0.15	0.10	0.003	?	0.01

Source: Estimation according to the methodology provided in the text, on data for marriages, from *Anuário Estatístico, Império Colonial*, several issues.

The value of this indicator for social cohesion deserves a comment. It is based on legal marriage, the top expression of personal openness to other people. Legal marriage is a formal union. It requires sanctioning by the state and usually all family and friends expect that it will involve someone who is thought to be socially equal or even superior. So, it is only fair to say that many other informal marital relationships also occurred. All kinds of interracial relationships contribute to reducing social distances. Legal marriage is, however, the upper expression of accepting different people, neglecting social barriers and promoting imitation. In fact, the more interracial marriages occur, the higher is the encouragement to other people to consider romantic love across racial lines. In conclusion, the indicator downgrades the estimated social cohesion. It is

biased by neglecting informal unions, concubines or other marital couples. This fact leads to the belief that the following analysis on social permeability is very safe.

Table 3 shows that there was a large wedge between official ideology provided in political speeches and reality provided through statistical evidence. Ethnic cleavages, particularly black/white fractionalization, were very prominent in the African continent. Although no Portuguese colony may be pointed to as a case similar to Zimbabwe or South Africa, ethnic stigmatization still characterized Portuguese colonial societies.

From all Portuguese colonial territories, Cape Verde and Angola were the societies most open to mixed marriages. They represented, on average, 15% of the total during the two decades studied. São Tomé and Príncipe and Mozambique followed, having about 10%. Among the African colonies, Guinea was the territory most averse to mixed marriages, and deserves to be seen as a third case level. In fact, the social cohesion measured by the weight of mixed marriages only reached 5%.

In all of the Portuguese colonies the dominant story for single white men who arrived from the mother country was marriage with white girls from domiciled white families or white girls from the mainland, who joined them after a legal marriage by procurator (*casamento por procuração*), according to the prevailing sexual moral rules of the time. The brides might be their girl friends at the time of their departure, or might be chosen by parents and family remaining in the mother country, or even found through announcements in newspapers.³⁹ Personal difficult financial situations, dreams of a transatlantic marriage, or the intent of women to find a good husband among wealthy colonial employees gave success to this social mechanism for searching out a marriage with a white woman. Dreams of this kind always affected female mentalities of the time towards imitation.⁴⁰ The character of the Portuguese African colonies also evoked the role of the “frontier” that involved this kind of wedding in “multi-layered imaginaries” just as has been stressed for Australia and other regions.⁴¹

The Portuguese Asian colonies show a very different structure for marriages from the interracial point of view. These were much more closed colonial societies, although they demonstrate some openness to geographical mobility into African colonial territories. Data on the distribution of the population, according to the so-called “somatic groups,” can show their presence in Mozambique Angola, and even Guinea. In the Asian colonies, colonizers were even scarcer than they were in the African colonies, as they represented much less than 1% of the

resident population (table 2-C). The annual observation of thousands of marriages in the database for Portuguese India and Timor shows that almost all of them occurred among Indian couples or Timorese couples, respectively. For Indian territories it is absolutely necessary to evoke the prominent role of religious cleavages, including Hindus (61%), Catholics (37%), and a minority made up of Orthodox Christians and Muslims.⁴² Both Hindus and Muslims respected the social organization through the division into “castes”. Note that for the African colonies the so-called “somatic groups” may be seen much more as social “orders”(ordens), and never as castes. According to Sreenivas, 2003, although new cultural elements such as the availability of women’s magazines, which introduced or “developed new notions of subjective inferiority” in Tamil Indian women in British colonial India, displacing “such conventional identity markers as kinship or caste”, it is unavoidable to consider the strong influence and the social role of religious elements in the Indian society.⁴³ In this case religious conversion is not enough to offset the social cleavages, although castes should not exist among Catholics there. In any event, the Hindu religion was also the religion of the large majority of the population. For historical reasons, India had its own civilization and the social system was quite firmly rooted in race and lineage: “Pride of race and of caste proved too strong for the legislation, which the Portuguese authorities periodically enacted to encourage mixed marriages”.⁴⁴ Anglo-Indians are also considered as an endogamous community in the available literature.⁴⁵ Even Portuguese was only language spoken among the most erudite members of the Portuguese territories in India. People in general spoke Concani in Goa and Guzerate or Urdu in the other territories.⁴⁶ Some of them could also write Marata, while the English language prevailed as *the* civilized European language. From the Portuguese perspective, this fact was not a reason to classify people as “indigenous”, as noted above, meaning that Indian culture was seen as superior or was at least much respected. The justification may be found in the Portuguese literature of the time: “Even the fact that some of them did not speak Portuguese does not deserve objection concerning their quality as Portuguese, as great patriots have always spoken other languages. Homeland is a spiritual reality, beyond racial or language groups”. (...) “Regarding religions, it is convenient to stress that in Portuguese India there exists freedom and respect for worship. Hindu or Muslim temples, as well as those of other religions, deserve respect (...). We shall not make any distinctions, for the effect of considering Portuguese, among poor or rich, Hindus or Muslims, Parsees or Christians. All of them and regardless of the ethnic group or religion to which they belong are equally Portuguese.”⁴⁷

Although this was the legal framework, such deep cleavages in ethnicity, language and religion that are absolutely clear in the structure of marriages, made social and interracial integration in India difficult. Weights and measures in India did not follow the universal metric system, another proof of the British prevailing influence. In all other Portuguese colonial territories it was used.⁴⁸ Note also that these Portuguese colonial territories were the first to leave the Portuguese empire.

With this social background it is easier to comment on the data that show that Indians only married Indian people (wives or husbands) and did not mix with other ethnic groups. Mixed marriages represented only 0.3% of total marriages. Among them, marriages between a white husband and an Indian wife were statistically dominant, although interracial marriages also included mixing with other minorities (particularly with mixed and blacks). Although it is quite difficult to establish a comparison with British India, because “any effort to compare different imperial systems (...) raises questions about what it is we should be comparing”,⁴⁹ note that intermarriage in British India also occurred “between Britons and Anglo-Indian women”, although Indian and Anglo-Indian were mostly endogamous. Caplan, 2001 refers to the strong past presence of the Portuguese in India (Madras and San Thome near Madras, for example) leading to marriages between Englishmen and “half-castes of Portuguese extraction” to report on Anglo-Indians, who he describes as the “Children of Colonialism”.⁵⁰ Women always introduced diversity and miscegenation, as is very well known. Portuguese-Indian, like Anglo-Indian women, also married European males. On the contrary, only better placed male Anglo-Indians, after going abroad for studies, could marry British (or other European) women, while Anglo-Indian women could aspire to marriages with whites (Europeans).⁵¹

International Comparisons

Portuguese colonization in Africa was too short for interracial marriage to produce the effects of social interracial integration as hybridization, as it lasted for only a little less than half a century. In the USA “1 in 40 persons identify himself or herself as multiracial”, which is 2.5% of the population. And “this figure could soar to 1 in 5 by the year 2050”, which will be 20%.⁵² With the exception of islands, Portuguese colonies in the 1940s and '50s were less mixed than the USA is today. Note that a much stronger miscegenation was reached in the Atlantic islands under Portuguese colonization. Not only does insularity help to *mestizaje*, but also Portuguese

colonization had persisted throughout the previous centuries. The islands, therefore, were much more *creole* societies than continental territories. Of course one may blame on these comparisons as they suppose that “Legal, economic, religious and familial structures are treated as phenomena to be judged by Western standards”.⁵³

Moreover, racial prejudice was much more bipolar black/white focused.⁵⁴ In Portuguese colonies no black (“negro”) husbands married “white” women. In America, “5.5 percent of black males married white females in 1990”.⁵⁵ This fact may indicate less social prejudice, but surely also results from more asymmetric educational levels between whites and blacks in the Portuguese colonies.⁵⁶ Social classes and education were coterminous, so race and education were coterminous as well.

It is also easy to believe that interracial marriage was more difficult in light of the stage of economic growth. As African colonies were weakly urbanized, there was very little exposure of blacks to whites: in each colonial territory most of the native people lived in the countryside, while whites concentrated in urban centers. When blacks did live in the urban centers, they concentrated in the peripheral neighborhoods, the *musseques* of Luanda, for example, making for social segregation but also hybridization and *mestizage*.⁵⁷ This means that color and residence were coterminous and in large cities ghettoization of poverty led to segregation, but also to interracial marriage and *creolization*. This is a very well known process that is also documented for other countries and their cities.⁵⁸

The longest-lasting Portuguese colonization, in Brazil, produced a widely mixed society. Brazilian segregation is well documented, but even so it is also considered “moderate when compared to the extreme black-white segregation still found in major US cities”.⁵⁹

Conclusions and Epilogue

In this paper the results presented indicate that homogamy was dominant in the Portuguese colonies. The paper demonstrates that race and marriage were not independent variables and rejects the notion that government political philosophy was successful in considering formal and juridical equality for all the Portuguese people living there. Low levels of segregation allowed interracial interaction, including interracial friendship and intermarriage, at least among similar social classes or cohorts. However, cultural assimilation through university attendance could not be as efficient as social cohesion resulting from interracial marriages. According to recent studies,

shifting social attitudes, rather than laws and courts, have greater impact than formal or juridical changes. In fact, common manners and cultural affinities such as the Portuguese language could create a homogeneous mixed population. Instead of considering that mixed people were marginal groups to both of their origins one should better understand that they established cultural linkages for bringing together separate patterns and traditions in a society where the binary opposition between white colonizer and colored colonized was the main assertive social cleavage.⁶⁰

This paper therefore adds one more perspective to decolonization and independence. It is possible to say that colonial wars in the three main colonies of Guinea, Angola and Mozambique for 14 years from the beginning of the 1960s led to attempts of enlarging ethnic and cultural merging in new experiences for sociability, economic integration for growth and development. These political attempts could not accommodate the conflicts, which led, in turn, to political independence for all the territories in the middle of the 1970s, immediately following the first oil shock.⁶¹ Traditional explanations only include the international pressure of the great powers (including the United Nations) on Portugal to decolonize, the financial constraints to support colonial administration and colonial war, or the failure of the attempts for an integrated Portuguese space including the mother country and the African colonies along with the Portuguese participation in the European integration through EFTA.⁶² It would be better to adopt the recent perspectives on liberation movements that consider them as real *rebellion groups* against the ruling racial minorities made up of white and assimilated people. Of course, these minorities claimed control of the resources that the colonizers and assimilated were monopolizing, if an economic perspective may be used, as is the case in many recent papers devoted to these issues.⁶³

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¹ Cunha, 1964: 1.

² Cunha: 2.

³ Cunha: 13.

⁴ Cunha: 13. On "the urge of purity among the impure" for Anglo-Indians, see Anthony, 1969, 368.

⁵ Cunha: 19.

⁶ Boxer, 1961: 113-138.

⁷ Godinho, 1962: 15.

⁸ Godinho, 1962,: 15.

⁹ Mata; Valério, 1994: 201.

¹⁰ British India became independent in 1947 paving the way to the Dutch, Belgian and French decolonization experiences that followed up.

¹¹ China, India and Indonesia advanced their claims to Macau, Portuguese India and Portuguese Timor, respectively. Independence movements began to form in the African colonies.

¹² It is worth noticing that these terms had been the official ones until the overthrow of the Constitutional Monarchy in 1910.

¹³ Caselli; Coleman, 2002: 1.

¹⁴ Ghosh, 2005. See also Blunt, 2003, 281-294. Like Anglo-Indians, mixed people felt the cleavage of the Portuguese empire when independence brought identity problems to most of them. Many of them felt they were Portuguese and thought of Portugal as their mother country, as well.

¹⁵ Caselli; Coleman, 2002: 2.

¹⁶ Nazzari, 2001: 497.

¹⁷ Telles, 1995: 396.

¹⁸ Boxer, 1961: 116.

¹⁹ McClintock, 1995: 5.

²⁰ Godinho, 1954: 33.

²¹ Anthony, 1969: 3.

²² Anthony, 1969: iv, x, 9, 141-142.

²³ Boxer: 121.

²⁴ Stoler, 1997: 8.

²⁵ Easterly, 2000.

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- ²⁶ Alesina; Baqir; Easterly, 1999: 1243-1284.
- ²⁷ William; Levine, 1997: 1203-1250.
- ²⁸ Bailey, 2004: 728-747. For racism and anti-racism in Brazil see Telles, *Race, class and space in Brazilian cities*.
- ²⁹ Miller, 1988: 246-250.
- ³⁰ Cott, 2002: 88-90.
- ³¹ For the portrayed role of mixed marriage and assimilation as a natural means to overcome and solve the so-called Indian "backwardness" and poverty, see Jacobs, 2002: 29-54.
- ³² Douglas North, 1990.
- ³³ For the Brazilian case see Telles, 1995.
- ³⁴ See, for Norway, Birkelund; Heldal, 2003.
- ³⁵ Harris; Ono, 2005: 236-251.
- ³⁶ The sample is made of 7,273 marriages for Cape Verde, 974 for Guinea, 456 for São Tomé and Príncipe, 2,238 for Angola 7,918 for Mozambique, 46,124 for India and 3,822 for Timor.
- ³⁷ See Cott, 2002: 88-90.
- ³⁸ McClintock, 1995: 5.
- ³⁹ To compare with Portuguese immigrants in Argentina, see Borges, 2003: 445-479.
- ⁴⁰ For the Australian experience see Mc Grath, 2005. For the role of wealth in looking after marriage see Breslaw, 2003, 2003: 657-673.
- ⁴¹ McGrath, 2002: 76-108.
- ⁴² Godinho: 18.
- ⁴³ Sreenivas, 2003: 59-82.
- ⁴⁴ Boxer, 1961: 127.
- ⁴⁵ Anthony, 1969: 365
- ⁴⁶ Godinho, 1962: 19.
- ⁴⁷ Godinho, 1962: 34.
- ⁴⁸ Godinho, 1962: 24.
- ⁴⁹ Stoler, 1997: 29.
- ⁵⁰ Caplan, 2001: 51.
- ⁵¹ Anthony, 1969: 210.
- ⁵² Lee, 2004: 221.
- ⁵³ Mohanty, 1997: 272.
- ⁵⁴ Rosenfeld, 2001: 161-175. Qian; Lichter 2001: 289-312.
- ⁵⁵ Wong, 2003: 803.
- ⁵⁶ For biases on admission to school and scholarship in the USA, see Myers, 2002.
- ⁵⁷ Or *favelas* in the Brazilian case, Telles, 1995: 397.
- ⁵⁸ Telles, 1995 and Telles, 2004, for Brazilian cities.
- ⁵⁹ Telles, 1995: 395.
- ⁶⁰ Renee, 2003: 104; Anthony, 1969: 8.
- ⁶¹ After the 1974 revolution in Portugal, the independence of Guinea-Bissau was recognized in the same year, and independence was granted to Cape Verde, Mozambique, São Tomé and Príncipe and Angola in 1975. The Portuguese rule on Macau ended in 1999. In 1975 Indonesia occupied Portuguese Timor. As Portugal refused to accept the situation, and the Timorese independence movement refused to yield to Indonesian occupation, the conflict dragged on, until a referendum was held in 1999, with a clear majority voting for independence. After some nasty incidents, Indonesia withdrew, the United Nations took over the administration of East-Timor, and the country gained its independence in 2002 Lloyd-Jones; Pinto, (eds.), 2003.
- ⁶² Valério, 1998: 53-69.
- ⁶³ Hodler, 2004.