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THE PORTUGUESE OVERSEAS EXPANSION (1415-1825)

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Abstract

The Portuguese Empire was one of the most successful European empires of history. Stretching all the way from Brazil, to Macao; it had territories in every continent in the world. Portugal's discoveries opened the world to a whole new era of trading overseas. Portugal was the first to establish direct trade between Asia and Europe, a path that would be later followed by the English and the Dutch. This new route throughout the Cape of Good Hope enabled western European countries to get goods, as pepper or cotton, from Asia without intermediaries like the Ottoman Empire.

After dealing with the origins of Portuguese expansion (Part 1). I will be focusing on the eastern side of the empire (Parts 2 and 3). However, it is undeniable that Brazil was fundamental in the Portuguese Empire and that later it would become more and more important to the Crown. That's why I will be devoting a chapter to Brazil (Part 4), because without understanding it we cannot understand the Portuguese empire as a whole.

Since the treaty of Tordesillas the Spanish Empire focused on conquering and colonizing America and the Portuguese focused their efforts on exploring and colonizing their way to Asia and the coast of Asia itself. I reckon that the most remarkable thing Portugal did during its history was to successfully connect Asia and Europe. That's why I will be focusing on the African territories and in the *Estado da India*, starting from 1415, at the beginning of the Portuguese overseas expansion. In any case, the Golden Era of Portugal in the East came to an end during the 17th century, its decadence would be compensated by the growing importance of Brazil during the 17th and 18th centuries.

For this purpose, my main source will be modern bibliography. A lot has been written about the Portuguese Empire during the last 20 years, so those works will be the basis of my paper. I could not end this paragraph without mentioning the original works of Magalhães Godinho and Charles Boxer, which were the keystone to the knowledge we have nowadays about the Portuguese Empire.

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1. ORIGINS OF PORTUGUESE OVERSEAS EXPANSION

We can mark the beginning of the Portuguese overseas expansion at the conquest of Ceuta, which happened in 1415. There were several reasons for the conquest of Ceuta: Firstly, it was a place of strategic interest to fight the Muslims and outmaneuver Castille who was also looking to expand to Africa. More important than this was the economic interest of Ceuta, which received goods from Africa and the Middle-East (Disney, 2009b; pp. 3-4). But the main reason that made Portugal undertook the conquest of Ceuta was the very essence of the Portuguese economy. It was an economy habituated to war, since its birth Portugal was able to get more land and riches via conquering Muslim land in the peninsula. After the conquest of Algarve there was no more Muslim land to conquest and so the society, mainly the nobility pressed to continue the Reconquista further south, to Africa (Costa, Lains and Münch, 2016; p. 43).

The conquest of Ceuta was a well-planned invasion to conquer the town. The military campaign was extremely fast and successful. Moreover, it gave huge profits to the Portuguese. Encouraged by this success Portugal attacked Tangiers, but this time they encountered heavy resistance and the campaign was a complete disaster. The Portuguese continued fighting with the Moroccans, but they never repeated the success of Ceuta, and eventually Portugal realized that this struggle was not worth it and abandoned it.

There were several reasons for Portuguese exploration to the south. The experience acquired in Ceuta, for instance, was a big encouragement for them to travel south. First of all, the economic reasons, after they managed to conquer a port like Ceuta they were able to get some African goods by trading there, but when the city was conquered the majority of the Muslim trade moved towards other nearby cities that remained Muslim. Thanks to the experience gained trading in Ceuta the Portuguese learnt that the production centers of most of the goods arriving in Ceuta was in the south. Encouraged by it and hoping to access those goods directly by sea, they set on a mission to explore Atlantic Africa (Disney, 2009b; pp. 45-46).

Behind the economic reasons there was another reason, the search for the Prester John. Although it tends to be forgotten this maybe the main reason for the early exploration to the south. The Prester John was supposed to be the ruler of a powerful Christian kingdom in the interior of Africa. We have to understand that Portugal was a kingdom born during the struggle against the Muslims, and their whole history they had been fighting against the Muslim infidel. They needed help to hold their land in North Africa and in the east the Ottoman Empire was growing more and more threatening. So, they thought that the Prester John's kingdom would be in a similar situation and thus, they could help each other in their struggle against the Muslims (Disney, 2009b; p. 33).

The most known reason for Portuguese expansion has been to find a direct route to India, but as I said before, this was not the goal at first, only later would the aim become reaching Asia. In 1453, the Ottoman Empire conquered Constantinople. Therefore, importing spices to Europe through Anatolia was a lot more complicated. The prices of spices skyrocketed in Europe, pepper price for example raised 46% between 1450 and 1500 (Costa, Lains and Münch., 2016; p. 50). This huge rise in the price of pepper was the main factor that encouraged the Portuguese to reach Asia.

2. THE AFRICAN JOURNEY AND SETTLEMENTS.

Portugal had reasons to explore the south, but so did other nations. Castille was geographically as well located as Portugal to begin the exploration southwards. Indeed, some islands such as the Canaries were already colonized by Castille and several fisheries through the Atlantic Ocean had already been established.

During the 1475 succession war Portugal achieved some victories over the Castilians in the waters of Guinea and Castille realized that it was going to be difficult to compete with Portugal in African waters. At the same time, some diplomatic labor in the Holy See secured Portugal's right to conquer all the lands south of Cape Bojador. Negotiation would continue between Portugal and Castille, having the Holy See as intermediary before they signed the famous Treaty of Tordesillas (1494) in which they divided the map along a line 370 miles west from the Azores. This treaty would determine both the Spanish Empire and the Portuguese Empire forever. Portugal received rights east of the imaginary line and Castille received those rights to the west. With those treaties Portugal was able to manage the Castilian influence in Africa and thus, they became the only colonizing power in West Africa (Coben, 2015; pp. 142-162). With the time, competence would arrive on the African coast, even with the papal bull and the Treaty of Tordesillas. First in the form of pirates around 1530, later the English would arrive in 1550 and by 1580 the Dutch. These new powers were welcomed by African rulers and Portugal would have to compete with them (Disney, 2009b; p. 54).

In 1445 the Portuguese founded their first *feitoria* in Arguim. It was located in a small island near the coast of today's Mauritania. There was nothing of interest in the island, but it was easy to defend since it was close to the coast. This was going to be a pattern that would be repeated in almost every *feitoria*. The place itself had no value, although it had to be easily defensible. The value of the *feitoria* was in the opportunities it generated to trade in new nearby markets. Inland, near the coast, the town of Wadan was located. A market where the Portuguese traded with trans-Saharan caravans. The *feitorias* were often

also used as administrative headquarters and provided with fortresses. The investments in the defense of the *feitoria* shows the importance they had to kings of the era, as a high economic revenue was earned from them. Also, the fact that the fortresses had defenses looking to the sea shows that these fortresses were not only made to protect the *feitoria* from local powers, but also from other European powers (Kwado and Smith, 2018; p. 25).

At first, the presence of the Portuguese in West Africa was limited to raiding, but unlike in other places here they met hard resistance. They suffered several defeats against the Senegambians. To avoid this struggle the Portuguese Crown decided to send the nobleman Diogo Gomes to negotiate a peace agreement and secure safe and peaceful trade in the future. By 1462 Gomes had fulfilled his mission and there were Portuguese merchants trading both in Senegal and the Gambia river. Ironically, trading was even a better business for the Portuguese than raiding had been. It is estimated that before 1460, during the raiding phase, few hundred slaves were taken by Portugal each year. But by the start of the 16th century, with trade as the main way of getting slaves, more than five thousand slaves left the coast of Guinea each year, and it was a quickly growing business (Thornton, 2007; pp. 139-144).

Portuguese presence in West Africa had three forms: private monopolies, *lançados* and direct Crown control. Private trade monopolies were handed to traders of Portugal during a certain amount of time. Those contracts were offered in public auction and the most successful bidder would get the contract. By the beginning of 16th century there were four monopoly zones: The Senegal region, Gambia, the rivers of Guinea and the coast of Sierra Leone. Direct royal control was, as the name says, when the king of Portugal controlled the trade; this happened mainly in the most profitable areas.

Lastly, the *lançados* were Portuguese people who lived in Africa or other areas of Portuguese influence. Mainly they settled near the coast and rivers of West Africa. Their descendants were mixed bloods of Afro-Portuguese ascendance. Their main activity was small scale trade, heavily dependent on water transport. They were used as interpreters

between Portuguese and African traders or rulers. They were a problem for the Crown because they undermined the monopoly of the contracts Portugal's Crown offered. That's why several measures were taken to weaken their presence in West Africa, but they had no success (Disney, 2009b; pp. 49-56).

By the end of the 15th century the Portuguese had managed to settle in several points of Guinea. The most important Guinean settlement was in São Jorge da Mina. There, the private merchant who had bought the monopoly for that area, Fernão Gomes, discovered that gold could be obtained through barter and he made great profit from this discovery. Seeing that huge profits could be made in the area Joao II decided to install the royal monopoly for that area. Not only that, in 1482 he founded a *feitoria* there and he ordered to build a massive fortress (the Elmina castle) on the mouth of the river Benya in today's Ghana. The scale of the fortress is a clue of the huge wealth the Portuguese obtained there (Kwado and Smith, 2018; p. 30).

The gold income of Sao Jorge da Mina was vital for the Crown of Portugal. Portugal never managed to get control of the inland mines. Instead, they would trade with African traders who brought the gold to the shore. In exchange for the gold, they offered a wide variety of commodities from Europe, Africa itself and even Brazil. Textiles, pots, iron, alcohol, slaves, glass, coral and other manufactures were offered by the Portuguese. Many of those were supplied by trans-Saharan caravans before, but since their arrival the Portuguese managed to control that trade (Disney, 2009b; p. 59). The gold flow from Sao Jorge da Mina experienced ups and downs, in 1496 it produced 649 kilograms of gold, which was equal to around 70 million *reis*. It reached another peak in 1531 when it generated around 681 kilograms of gold. Those were peak years and not every year the same amount of gold reached Portugal. An average of 332 kilograms of gold a year left Sao Jorge da Mina during the first half of the 15th century, which was a lot for those early years. After 1520 the gold revenue of Sao Jorge da Mina started to slowly decrease and the *feitoria* lost importance. The Portuguese Crown was able to replace this income with another more profitable income, the import of spices from Asia, mainly pepper (Costa, Lains and Münch, 2016; pp. 80-81).

Another important Portuguese settlement was located in Benin, in the Niger delta. It proved to be an excellent source of slaves. Benin was also a good source of spices, in particular Benin Pepper or "*piper guineense*". Trade of Benin pepper was a Crown monopoly and it became very profitable, but in 1506 trading with Benin pepper was banned, as king Manuel wished to encourage the imports of Asian "*piper nigrum*" (Disney, 2009b; Page 61-63)

During the 15th century and the first half of 16th century Benin was the main market of slaves for Portugal. Those slaves had several destinations, some of them reached even Lisbon. Others were used in the intra-African trade, bought in Benin and sold in São Jorge da Mina in exchange of gold. But most of them ended in the Atlantic islands of São Tome and Principe. There, those slaves worked in the big sugar plantations of both islands. The first plantations of Sao Tome were established in 1480, and they quickly grew up in size and production. Madeiran sugar plantations also developed thanks to the slave trade, and its production rose from 30,000 *arrobas* to 200,000 *arrobas* in just fifty years. According to the calculus made by Costa, Lains and Münch (2016; p. 77), one *arroba* is equivalent to 14.69 kilograms. Although the sugar from Sao Tome had lower quality than the Madeiran one its production quickly grew. Meanwhile since 1530 the production of sugar in Madeira started its fall and São Tomean production replaced it. By 1550 Sao Tome was already producing 150,000 *arrobas* by itself and by 1580 it produced around 200,000 *arrobas*. After that the sugar production of Sao Tome would also deplete because of slave revolts and blights. But by 1580 Brazil alone had the capacity of producing 350,000 *arrobas* of sugar alone, almost the same as the two islands at their respective peaks. The production of Brazil continued skyrocketing and by 1617 Brazil alone was producing one million *arrobas* of sugar each year (Costa, Lains and Münch, 2016; pp. 76-79).

TABLE 1. SUGAR PRODUCTION IN THE PORTUGUESE COLONIAL EMPIRE, 1515-1617

	Madeira	São Tomé	Brazil
1515-1525	200,000	100,000	
1527-1529	123,170		
1539-1536	135,860		
1550	40,000	150,000	
1578		175,000	
1581-1584	38,000-40,000	200,000	350,000
1610			735,000
1617			1,000,000

Source: Costa, Lains and Münch, 2016; p. 78.

After exploring and settling in Guinea, the Portuguese continued their explorations. They expected that the coast would go more to the east and then to the north until the end of Africa, but instead they discovered that it turned southwards. By 1480, the Portuguese explorer Diogo Cão had initiated contacts with the kingdom of Kongo. In Kongo the Portuguese became deeply involved in Kongolese politics and religion. Christianity had a warm welcome among Kongolese elites and in 1491 the king of Kongo and his older son converted to Catholicism. The kingdom of Kongo was considered as an ally and a friend. The Portuguese aided Kongo in their struggles against the rebels, in return they would get spoils of war, including slaves, and trading advantages. This way of getting slaves was very common in Kongo where Portuguese troops helped in several occasions, but it did also happen at least once in Benin. By the end of the 16th century the relationship between them would worsen and the Portuguese would shift southwards (Thornton, 2007; pp. 142-146).

South from Kongo was the kingdom of Ndongo, after some unsuccessful diplomatic moves the Portuguese decided to use conquest as the way to get into Ndongo. Two matters attracted the Portuguese interest: the presence of silver mines and slaves. After fighting the king of Ndongo and the local tribes for several years the Portuguese managed to get inland towards the promised silver mines. In 1604 the expedition reached the plateau where the silver mines were supposed to be, only to find out that they didn't exist. Even though the silver mines disappointment was big, it didn't decrease Portuguese interest in

the area and slave trade continued to be very important for the Portuguese traders in Angola.

In the year 1637 the Dutch took over São Jorge da Mina, and later in 1641 sent an expedition to Angola. The Dutch attack even managed to conquer Luanda, the capital of Portuguese Angola. As the Dutch managed to conquer the majority of Angola the Portuguese slave trade there stopped for some years. After that, a Brazilian private expedition was able to expel the Dutch and restore the slave trade. This shows the importance of trade links between Africa and Brazil, indeed a constant flow of slaves was fundamental to support the Brazilian plantations.

As we can see the main things driving the Portuguese in Africa were the search of precious minerals and trade, mainly slave trade. But they never forgot their compromise with Christianity. Wherever the Portuguese settled they tried to convert the local population. They also continued seeking for the Prester John, in order to create a big Christian alliance against the Muslims. They tried searching for it through the Mediterranean. Pêro da Covilhã and Afonso de Pavia were sent to Egypt, there Covilhã went to India and Pavia continued to the south into Egypt. Eventually Covilhã returned from India and was able to reach Ethiopia, where he found that Pavia had died. He was confined in Ethiopia by the king, so he couldn't leave the court and inform Lisbon.

Until the middle of the 16th century, Portugal had been the undisputed European power in the area, but things started to change in 1550 when the English arrived, later in 1580 the Dutch would also arrive to Guinea. Until this moment, the Portuguese had had the African trade almost monopolized, but now they would have to deal with European rivals. These rivals were welcomed by several African rulers, precisely because they would end Portuguese monopoly in the region. The competition happened mostly in Guinea, while in Kongo and Angola the Portuguese would still be quite free. English and Dutch merchants had the advantage of having better manufactures, both hardware and textiles. The Portuguese had more difficulties getting those high-quality manufactures, mainly

because they were produced in England and the Netherlands. On the other hand, the Portuguese knew the region much better than the new competitors, they had their contacts and the *lançados* were a great help when trading and doing diplomacy (Disney, 2009b; p. 54). Each year that the new competitors traded in Guinea they were able to know the area better and make contacts, so the Portuguese lost their advantage while they were not able to have easier access to the high-quality manufactures. This made the Portuguese lose influence and during the 17th century the main trade powers there became the Dutch and the English. Despite restructuring the monopoly system and starting several trade companies the Portuguese were not able to improve the situation (Disney, 2009a; p. 178).

In 1637 the Dutch managed to capture the fort of São Jorge da Mina and soon all the nearby forts and *feitorias* would also fall in the hands of the Dutch. Thus, the trade in Guinea became more difficult, if not forbidden for the Portuguese. In Whydah, for instance Portuguese traders coming from Portugal itself were forbidden, while those coming from Brazil could still trade there after paying a special tax collected in Dutch Sao Jorge da Mina. This norm generated a stronger trade connection between Africa and Brazil (Disney, 2009b; pp. 64-69).

Still, we have to remember that the Portuguese didn't pay the same attention to Africa during the 15th century than during the 16th century. Now the Portuguese Crown was much more focused on Asian trade. They were trying to dominate the Indian Ocean trade, as it was much more lucrative. By 1508 Guinean and Asian trade meant the same revenue for the Portuguese Crown, about 50 million reis. But during the 16th century Asian trade would undergo a huge growth. By 1534 Asian trade was ten times more profitable than the African one, indeed African trade halted to 25 million reis while Asian one grew to 250 million reis. The total revenues of the Portuguese Crown in 1534 were 438 million reis, more than half came from Asia; so, we can imagine why the Portuguese were more focused in Asian trade than in the African trade. The Asian trade would continue growing during the second half of the 16th century, while the African trade remained less important and profitable. As we can see on the table below in 1607 the revenues obtained by the Crown from the Asian trade meant almost 400 million *reis* while the combined Guinean

and Angolan trade meant only 48 million *reis*. Still, we have to take into account that the Angolan slave trade would strongly expand during the 17th century (Costa, Lains and Münch, 2016; pp. 97).

TABLE 2. REVENUES OF THE PORTUGUESE CROWN 1506-1607 in million reis

	1506	1519	1527	1534	1557	1588	1607
KINGDOM	74.8	111.7	131.3	153.7	288.8	421.0	460.8
Almoxarifados	65.7	96.1	84.0		190.5	198.2	198.3
Customs-Houses			5.7			125.0	186.5
Customs-Houses (Lisbon)	9.1	15.7	41.6		98.3	97.8	76.0
EMPIRE	104.1	164.6	na	284.8	na	347.0	521.0
Cape route	51.3	117.6	na	252.0	na	245.0	397.5
Guinéa, Cape Verde, Mina	50.9	47.0	na	24.8	na	56.4	27.0
Angola			na		na	11.0	21.0
São Tomé			6.0	8.0	na	7.8	9.5
Dyewood	1.9	na	na		na	13.6	24.0
TOTAL	178.9	276.3	na	438.5	na	754.8	939.8

Sources: Costa, Lains And Münch, 2016; p. 97.

3. THE PORTUGUESE IN ASIA: THE FIRST TO ARRIVE AND THE LAST TO LEAVE

In 1488 a Portuguese expedition led by Bartolome Dias finally reached the southern tip of Africa, yet, this expedition did not go much further beyond the Cape of Good Hope. Then in 1498 another expedition was arranged, led by Vasco da Gama. This time the aim of the expedition was, as we know, to reach the riches of India and to make direct contact with the Prester John. But instead, when Gama first crossed the Cape of Good Hope he did not go to Ethiopia or India. Instead, he went directly to Sofala, probably influenced by the information provided by Pero da Covilhã before being confined in Ethiopia. After going across the Cape and reaching East African ports the Portuguese had already completed the most difficult part of the voyage. Mozambique was an important piece of the Indian Ocean trade; the Portuguese took advantage of this and used the knowledge of local Muslim sailors. From Mozambique to Calicut, all the way in India, the voyage only lasted for three more months (Thornton, 2007; p. 145).

The mission of Gama was to get to India, but also to make some diplomatic contacts there, in the form of an embassy. Portugal set the first *feitoria* of Asia in Calicut, but they were not well received by local elites. Eventually the diplomatic mission of Gama failed and the Portuguese were forced to leave Calicut. In revenge the Portuguese bombarded Calicut and settled in Cochin, where they were well received.

The clear anti-Islamic nature of the Portuguese Empire made the Muslims of the Indian Ocean suspicious of Portugal's movements. After the incident of Calicut, a combined force formed by the Calicut navy and fleet of the Mamluke Sultanate attacked the Portuguese in the coast of India. Portugal defeated both navies and became the main naval power in the Indian Ocean with no other kingdom able to defeat their ships until the arrival of the Dutch.

Even after reaching Asia, the Portuguese did not forget their religious commitment. When Gama returned to Lisbon the king received very good news. Finally, the kingdom of the Prester John could be reached by sea. Also, according to Gama almost every town's population in India was a mixture of Muslims and Christians. Although these Christians had been separated from Europe and had different traditions, they expected them to join a future crusade to retake the Holy Land. With the combined power of the Prester John, the eastern Christians and the European kingdoms the Holy Land would be finally reconquered. Some years later they discovered that the Eastern Christians were not really Christians, but Hindus (Disney, 2009b; pp. 124-128).

Moreover, they learnt that the Prester John didn't exist anymore and that the Coptic Christian kingdom of Ethiopia was rather weak and not prepared for a crusade. Indeed in 1527 it was Ethiopia who asked for the help of Portugal to face their longtime rival Adal, aided by the Ottoman Empire. These disappointments ended the official religious approach of the Portuguese Crown, now instead, they would promote Holy Orders and let them do the religious work (Thornton, 2007; p. 147).

After the arrival to India, a viceroy was named to strengthen Portugal's position in Asia, the first viceroy was *Dom* Francisco de Almeida. During his rule the Portuguese presence was based in their ships and some *feitorias* along the coast of Africa and India. It was the next viceroy, called *Dom* Afonso de Albuquerque, who settled the basis of what would be the *Estado da India*. In 1510 with the help of some Hindu allies he conquered Goa. Goa would serve as the main base of Portuguese presence in Asia for almost 450 years. Six months later he sent an expedition with the goal of seizing Malacca, a strategic port in the coast of Malaysia. He successfully conquered Malacca, and built a great fortress there. Then he directed another expedition to Hormuz. In 1515 he conquered Hormuz and erected another big fortress to protect the island from foreign attacks. Before, in 1513 he had sent an expedition to Aden. There he pretended to conquer some island or territory to build another fortress to control the strait of Mandeb but he failed (Disney, 2009b; pp. 130-133).

These attacks are a clear indicator of the Portuguese intentions in the Indian Ocean, they were trying to control the choke points controlling the access to the Indian Ocean and therefore, the main trade routes. They went even further, in 1521 Manuel I named himself “King of the Sea”. The doctrine of *Mare Clausum* was proclaimed in 1520 which meant that only Portuguese ships or ships allowed by Portugal could navigate in the Indian Ocean. To navigate in the Indian Ocean non-Portuguese ships had to buy a safe conduct, named *Cartaz*, to Portuguese authorities. This system had two advantages: first, it was a system to control the maritime traffic of the Indian Ocean. And also, it generated a revenue because every ship wanting to set sail had to buy them. The selling of these *Cartazes* meant a big slice of the revenue of the main Portuguese cities in Asia (Disney, 2009b; pp. 156-157).

Apart from the straits the Portuguese started to settle in diverse places around the Indian Ocean. In Africa early attempts of diplomacy were made, but Portugal was not well received along the coast of East Africa. They were received as Christian intruders and not welcomed. So, as they were not well received the Portuguese approach stopped being diplomatic as it had been in most of West Africa. Now they would use violence as the way to enforce their interests in the region.

The Portuguese had an advantage they did not have in West Africa. Most cities were ports, rich because of the trade in gold and ivory and located just on the coastline, so it was very easy for the Portuguese to take advantage of their maritime supremacy. They sacked Kilwa in 1502 and in 1505 they attacked again and founded a fortress there. This pattern of enrichment through the use of force would be followed along all the coast of Mozambique (Thornton, 2007; pp. 146-147).

But the Portuguese wanted to strengthen their presence in East Africa to secure the gold from the inland. Based in the islands along the coast of East Africa, the Portuguese started trying to control the smaller ports of the coast of Mozambique and founding *feitorias* there.

Eventually, in 1571 the Portuguese decided to go inland to search and control the gold mines themselves. The first expedition failed, and soon it was followed by a second one which also failed. A third expedition was organized, who chose a different route to avoid the sicknesses of the tropical lands. That expedition did indeed reach the gold mines, but to Portuguese disappointment they were only small-scale exploitations and not the wealthy gold mines they were expecting. Finally, Portugal decided the mines were not worth the expenditures involved in their conquest and upkeep, and great military campaigns stopped in Mozambique (Disney, 2009b; p. 166). We have to remember that in these years they still hoped to find silver mines in Angola, so the precious metal search shifted there.

Mozambique was the only place in the Indian Ocean where the Portuguese went inland. This was not the norm in the *Estado da India*. The nature of the *Estado da India* was largely urban, the Portuguese would only take a city and use it as a base to trade. They would set up *feitorias* and trade within the already existing trading networks. The Portuguese empire was never a great producer of spices or other Asian commodities, their role in Asia was to be only intermediaries. These *feitorias* or fortresses were ruled by a captain and called *capitanias*. Several of them were established all around Africa and Asia: in Mombasa, Hormuz, Malacca, Colombo, Ternate, Macao among others.

A lot can be written about all these *capitanias*, and all of them had their own particularities, but due to the length of this paper I cannot talk about every one of them. The *capitanias* enjoyed a substantial autonomy, and even though they were officially subordinated to the viceroy in Goa in reality most of the captains were effectively independent to take their own decisions. The viceroys of Goa repeatedly complained about the difficulty of controlling the captains (Disney, 2009b; pp. 162-163).

As previously stated, the Portuguese expansion in the Indian Ocean was very fast: In 1505 they settled in Mozambique, in 1510 in Goa, 1511 in Malacca, Ternate in 1523, etc. Very few years passed between Portuguese discoveries and settlement. This speed was key to lay the foundations of the future *Estado da India*. But in the other hand that rush created

a problem, the *Estado* was very difficult to rule. It was very difficult to connect Goa with the rest of Portuguese settlements, and even more to arrange the economic exploitation of the recently created Portuguese Empire.

First a Crown monopoly was declared in a wide range of commodities such as: pepper, cloves, ginger, cinnamon, nutmeg, mace and other Asian commodities. In the west of the Indian Ocean the system was enforced with moderate success during the first years because of the stronger Portuguese presence. On the other hand, in the east the system was almost completely ignored and the bulk of the Portuguese trade was made by private merchants. The Portuguese Crown simply did not have the resources to control an area as big as the Indian Ocean.

Around 1530 the system was clearly not working and so Joao III decided to restructure it. To articulate the Asian empire and connect the distant Portuguese settlements and *feitorias*, the so called *carreiras* were created. The *carreiras* were trading routes between Goa and different Portuguese *feitorias*. Although they were still officially Crown monopolies the responsibility of the *carreira* would now be in private hands. Crown cargo had a reserved space inside the ship and the rest was left for the private interest of the *carreira* captain. At first, the majority of the space aboard was reserved for Crown commodities, but later more and more space would be used by private cargo. At the beginning the ships used in the *carreiras* were ships from the Crown, but in 1560 this changed. After that year private ships would be used in the *carreira*. With the new system the merchants would have to buy the right to do the voyage one year, called a concession voyage. This way the Crown was relieved because it didn't have to use its own resources and still received some benefits from the selling of concessions. There were two reasons why these *carreiras* were essential: they connected the *Estado da India* and they were necessary for its economic exploitation. With the time the system developed and *carreiras* between different *feitorias* started to appear, without having to sail from Goa or to Goa (Disney, 2009b; pp. 155-156).

The Portuguese soon realized that their manufactured goods held very little demand in Eastern markets. An intra-Asiatic trade was created in order to finance the purchase and shipments of spices and other goods to Europe (Ames, 2000; p. 103). This trade would happen mainly in the eastern part of the Indian Ocean, beyond Cape Comorin. An example of this is the *carreira* between Macao and Nagasaki which in 1580 reached an astonishing two million *cruzados*, twice the value of trade between Lisbon and Goa at its peak. The eastern *carreiras* were particularly profitable, in the Moluccas, Malacca, Macao and Nagasaki, this intra-Asiatic trade grew more and more profitable. Another *carreira* linked Manila and Macao, this one fed the insatiable demand of silver in China. This were more or less the trade goods carried by each of those eastern *carreiras*.

TABLE 3. TRADE GOODS CARRIED BETWEEN EASTERN FEITORIAS

GOA --> MALACCA	Indian linens, cotton goods, European goods, pepper, Ivory, lenses, clocks
MALACCA --> MACAO	Spices, pepper, hides, woods, European goods, Indian cloths, Ivory, lenses
MACAO --> NAGASAKI	European goods, gold, silks, porcelain and musk
NAGASAKI --> MACAO	Japanese silver, lacquerware, weapons and furniture
MACAO --> MALACCA	Pearls, Medicinal plants, porcelain, musk, silks and Japanese objects.
MALACCA --> GOA	gold, copper, silks, musk, porcelain, pearls, and Japanese objects
MACAO --> MANILA	Chinese silks, Indian cottons, furniture and porcelain
MANILA --> MACAO	American silver

Source: Russell, 1998; p 18.

Another *carreira* was responsible for keeping Goa and Lisbon connected. This was the most important *carreira* for obvious reasons and was called *Carreira da India*. It was a difficult and dangerous voyage which lasted for several months. The Portuguese soon experienced the risks of the *Carreira da India*, but they were also quick to understand the winds and monsoons and use them for their advantage. It was a very fragile link to connect an empire, it took around 8 months to complete the voyage and the mortality was around 50% as a result of disease, shipwrecks and overcrowding of the ships. Between 1500 and 1530, 7 to 14 ships left Lisbon to Goa every year. By 1550 there were only around 5 ships a year and by 1640 only two or three ships connected Goa with Lisbon. There even were some years when no ships reached Goa or returned, for instance in 1650 five ships left Lisbon and none reached Goa. (Ames, 2000; pp. 93-98). These numbers show us several things: first that even though the Portuguese quickly learnt the dangers of the *Carreira*

da India those dangers never disappeared. And second, they show a change of focus in Portuguese mentality, as years passed Brazil drew more and more attention to Lisbon based merchants.

The *Carreira da India* had a changing nature. It was born as a company formed by Portuguese Crown and private traders. In this company private traders could freely trade with Asia but they would have to pay the 28.5% of their revenues to the Crown. This only lasted the very first years after the discovery of the Cape. By 1506 a royal monopoly was established in the *Carreira da India*, this meant that this trade was completely in the hands of the king. However, there were ways to get around this prohibition, the most common of them was the system of *Quintaladas*. The *Quintaladas* were space awarded to individuals for their services to the Crown. They were awarded for some years or for life, and records show us that the quantity of ship space used with *Quintaladas* was considerable and varied during the years. We know that during some years private cargo took up to 90% of the cargo (Ames, 2000; p. 102).

In 1570 king Sebastião introduced a significant change in the system. Now private enterprises were allowed to freely trade with Asia in a wide range of commodities, but a condition was imposed. They had to buy the products in Portuguese *feitorias* in Asia at a fixed price. This way the Crown didn't have all the responsibility for the trade with Asia. Now private traders would also take the risk of the *Carreira*, but still the Crown would keep some control over the trade due to the fixed prices. After 1576 the Crown started to sign contracts with private traders granting the trade monopoly of some commodities for some years (Subrahmanyam, 1993; pp. 112-114). During the late 16th century, the *Carreira* was in decline, partly because Brazil was drawing more attention and partly because of the Iberian Union. Indeed, after the Iberian Union finished in 1640 the *Carreira da India* was virtually moribund. More than once, Goa and Lisbon could not be connected by sea. It is true that after 1674 the *Carreira* experienced a recovery thanks to the reforms of king Pedro II. Those reforms helped reducing the dangers of the *Carreira*. These new rules meant a more royal controlled *Carreira*. The reforms were against the will of captains and merchants but the Crown managed to enforce them (Ames, 2000; pp. 97-101).

The decadence of the Portuguese Asian empire was the result of many factors. The Portuguese had been undisputed in the Indian Ocean since their victory over the fleets of Calicut and the Mamluke Sultanate. But a century of total control over the Indian Ocean came to an end when in 1595 the Dutch reached Java. In 1602 they founded the VOC (Netherlands East Indies Company). Around the same years the English also created the EIC (East India Company).

As mentioned earlier, the Portuguese had imposed a system of *Mare Clausum* and only Portuguese ships or ships carrying a *cartaz* had the permission to navigate. Moreover, since 1580 Portugal was integrated in the *Monarquia Hispanica* which was at war with Netherlands and England. So, the Portuguese tried to expel them from the Indian Ocean by force, but they failed. Already in 1620 the Dutch were the dominant naval power in the spice islands and the English were able to defeat the Portuguese in Surat, quite near Goa. This demonstrated the weakness of the *Estado da India* which was unable to protect itself even in India.

During the first century of Portuguese presence in the Indian Ocean the big land-oriented empires such as the Moghuls, the Chinese Empire or the Persians had tolerated Portuguese presence in their coasts. They tolerated them because their main trade was made inland and not by sea, so they didn't worry much about the Portuguese claims on the Indian Ocean. But during the 17th century they changed their minds and were not willing to tolerate the Portuguese anymore. Sometimes they even joined hands with the English to expel the Portuguese from their coasts.

After some more attacks the viceroy understood that Portugal could not face the English, the Dutch and the local powers alone and in 1635 a peace treaty with the EIC was agreed. However, this did not stop Dutch attacks over the Portuguese ships and possessions. The Dutch quickly expelled the Portuguese from the spice islands, Malacca, Ceylan and Nagasaki. Now the only Portuguese presence in east Asia was Macao (which would remain Portuguese until 1999) and Timor. Attacks on Portuguese ships by the Dutch were

common, and they even repeatedly blocked Goa during some months of the year (Disney, 2009b; pp. 168-171).

Portugal did indeed introduce some reforms in order to face the growing menace of the English and the Dutch. In 1628 a Portuguese East India Company was formed. The company would have the monopoly over the trade with Asia but in exchange they would have to be responsible of protecting Portuguese land and trade. The Portuguese East India company was a failure and only lasted until 1633. As the empire on the East was crumbling the Portuguese started to look elsewhere. From this moment Portuguese Crown and enterprise would leave the *Estado da India* in the background and instead started to focus in the Brazilian lands (Pedreira, 2007; pp. 60-63).

4. BRAZIL, THE UNEXPECTED EMPIRE

The discovery of Brazil happened in the year 1500. Pedro Alvares Cabral was an explorer on his way to India, but would be remembered not for reaching India, but for discovering Brazil. If he reached it by accident or on purpose, it is not clear yet. Nevertheless, the important thing is that Brazil was discovered. At first Brazil didn't seem very rich, there was no evidence of spices or precious metals, and didn't draw much interest from the Crown. Although there was not much interest, the land seemed fertile and brazilwood was abundant. So, several *feitorias* were formed along the coast after the discovery of Brazil (Disney, 2009b; pp. 204-205).

Many authors such as Subrahmanyam (1993; p. 79) state that the real colonization of Brazil started in 1530 when Martin Afonso de Sousa was sent to Brazil with several ships and 400 colonists. Even though Brazil had no economic importance until 1530, the Portuguese showed a strong commitment towards keeping possession of it. After 1510 there were foreign expeditions to Brazil, mainly French. The aim of those was to collect brazilwood, but also to establish shore facilities and gain a permanent presence. The Portuguese organized patrols along the coast of Brazil in order to keep the European countries away (Disney, 2009b; p. 210).

After the colonization led by Martin Afonso de Sousa there were important changes on land administration. We have to remember that almost all the Portuguese Empire were shore cities and ports. Thus, as Brazil was a big piece of land some system to administrate had to be created. Brazil was divided into 15 *donatarias*, each of them was directed by a captain. Portugal tried to create settlements in all the *donatarias*. At first only 10 of the 15 *donatarias* had Portuguese settlements, and the only really prosperous ones were Pernambuco and São Vicente.

By 1548 clearly the *donatarias* system was not working. Most of the Brazilian coast was unoccupied and expeditions from other European countries were becoming more common. Besides, the sugar cultivation on Brazil was growing more and more promising and the recent Castilian discoveries of silver mines in Peru encouraged the Crown to get more involved in Brazil.

In 1548 the Crown decided that a central royal administration was necessary to achieve different goals. First, the colonization of more Brazilian coastline, in order to claim that Brazil was only Portuguese and to improve the defense of the new possessions against European rivals. Also, they hoped that this central administration would have better chance to deal with the natives, peacefully or by force, and expand inland. There were two reasons to expand inland, getting more land for tropical plantations and exploring the interior of Brazil hoping to find their own Potosi. This system did indeed work, and thanks to the centralized rule the Brazilian coast was secured, the French expelled and the Amerindians pacified. After expelling the French and pacifying the Amerindians more European immigrants started to arrive to Brazil (Disney, 2009b; p. 210-214).

Despite the efforts of the Portuguese to prevent European settlements in Brazil, during the 17th century they continued. It was mainly the French who tried to settle in diverse places of the Brazilian coast. But in 1621 a new competitor appeared when the WIC (Dutch West Indian Company) settled in Brazil. Their goal was to get involved on the production of sugar. They sent diverse attacks on Portuguese settlements in Brazil to try to expel the Portuguese and conquer the land for their plantations. They succeeded in Ceara and Pernambuco. By 1637 the Dutch settlements were successful and prosperous. Encouraged by the success of their Brazilian expansion in 1637 they decided to conquer the rest of Brazil and completely expel the Portuguese. This campaign was stopped by the resistance of Salvador, which slowed Dutch conquest. The war with Portugal upset the local population of the Dutch areas, who was largely Portuguese. There were many uprisings, which created political and economic problems in Dutch Brazil. The most important of those uprisings happened in 1645 in Pernambuco. This revolt triggered a series of events that provoked war between Portugal and the Netherlands. To summarize the Portuguese had the upper hand at land while the Dutch controlled the seas. But in a

stroke of luck in 1652 the war between England and Netherlands started and so the Dutch retired much of their fleet to the metropolis. Thanks to this the Portuguese were able to win and reconquer the territories they had lost. Finally, the Dutch gave up their claims on Brazil (Disney, 2009b; pp. 212-229). After this the Portuguese would control Brazil with almost no external interventions.

Economically the exploitation of Brazilian resources had different phases; the first happened just after the Portuguese arrival. As stated earlier, Brazil didn't seem particularly rich for the Portuguese at the start, as it didn't grow spices and they could not find precious metals there. But it was abundant in brazilwood, a wood that was mainly used to create red dye. Thus, the exploitation of this material started as soon as the first Portuguese settlements were set up. At first, the Portuguese were aided by the Amerindians to collect those trees, and the relations between them were not bad. Then the Portuguese started to collect the trees using slaves and the exploitation greatly increased, this caused problems between the Amerindians and the Portuguese.

Sugar soon took a major role in the Brazilian economy. Introduced from the Atlantic Islands the first evidence of sugar crops in Brazil dates from 1530. Brazil was a logical place to start the production of sugar as it had good terrains and climate, furthermore Brazil had easy access to African slaves. All these things made Brazil the perfect place to grow the crop and the result was a very high-quality sugar (Costa, Lains and Münch, 2016; p. 78). By 1570 the crop began transforming the Brazilian economy. Between 1570 and 1585 the production doubled because of the huge demand. According to the calculus made by Schwartz (2007; p. 25-26), based on the sugar mills, the two main centers of production were Bahia and Pernambuco. When Pernambuco was conquered by the Dutch in 1630 more than half of the sugar production was located there making the Brazilian economy suffer a great recession. After the reconquest of Pernambuco by the Portuguese the sugar demand had already depleted, so it was not as profitable. Production in Brazil started to diversify, mainly towards the Bahian tobacco, but the economy was still in recession.

In this context, where the economic viability of Brazil was uncertain, the long-awaited discovery of gold finally happened. In 1695 a large deposit of gold was discovered in Minas Gerais and 1730 further west in Mato Grosso and Goiás. The discovery of gold skyrocketed the value of Brazilian economy. The riches coming from Brazil changed the mentality of Lisbon. Monumental buildings and projects were undertaken, also the gold helped to build the absolutist project of the Crown. The Portuguese started to think that the gold could pay for everything and that the resources were endless. There is a debate about the importance of the gold exports from Brazil. Although it is undeniable that the gold discovery was a huge boost for the Brazilian economy, some authors defend that the value of gold exports never exceeded the value of other commodities (Schwartz, 2007; pp. 34-37). Other authors like Münch, Lains and Costa (2016; p. 208) defend that the gold did indeed exceed the export of other commodities. Although it is uncertain whether gold or the other commodities had more importance, it is undeniable that the gold discovery was a huge boost for the Brazilian economy.

Apart from the obvious economic boost brought by the discovery of the mines, the exploitation of those also brought other advantages to the development of Brazil. New cities were created inland, and in order to connect them new roads were built to supply these cities from the sea. The huge amounts of gold created a gold rush and lots of European immigrants went to Brazil hoping to become rich. But for the disgrace of the Portuguese in 1760 the gold production started to decline and again the Brazilian economy suffered a big crisis, this time dragging the whole Western Portuguese Empire with it (Schwartz, 2007; pp. 35-38).

To face the crisis the Portuguese promoted several economic reforms. The aim of those reforms was to reduce the dependence Brazil had on gold. To fulfill that goal the plantation of sugar and other tropical species, like coffee, cocoa, cotton or rice, was promoted. The gold rush had had a devastating effect on the plantations, after the discovery of gold almost all the economic and political resources were diverted to exploit the mines (Schwartz, 2007; pp. 35-38). The reforms were indeed useful, but the economic situation of the world was more decisive. These plantations started to re-develop in the verge of the Industrial Revolution, Europe needed those raw materials. The plantation of

all crops increased: coffee, tobacco, sugar, cotton, rice, etc. The massive increase of the rice and cotton plantations is particularly remarkable. Cotton had been planted before in a small scale and for local use, but now massive plantations started to appear because of the rising prices of cotton due to the Industrial Revolution, mainly in Great Britain. Rice was also planted before the reforms, but now a huge amount of rice was being produced, by 1780 Brazil produced enough rice to feed its entire metropolis (Disney, 2009b; pp. 282-284).

During the late 18th century there were several conspiracies to overthrow the Portuguese and install a republic. Those conspiracies, that never reached the stage of revolt were inspired by the Enlightenment and later by the French Revolution. During the Napoleonic occupation of Portugal, the king and the court escaped to Brazil. As the metropolis was occupied and the king was in Brazil, an estate of “independence” from the metropolis was achieved peacefully. Indeed, now it seemed like Brazil was the administrative center of the empire, what was going to be done in Africa, Asia, but also in the metropolis was decided in Rio de Janeiro (Disney, 2009b; pp. 296-298).

The way Brazil saw Portugal would never be the same, the urge for independence would grow stronger as time passed. Trying to placate those separatist feelings Joao VI granted Brazil the status of kingdom. The idea was to make Joao emperor of Brazil and Portugal, while his son Pedro of Portugal would be the king of Brazil, a step below Joao VI. But when Pedro was reigning in Brazil, he noticed that the separatist movement was almost impossible to stop and pressed by the United Kingdom the process for the independence of Brazil started. The 29 of august of 1825 the treaty of Rio de Janeiro was signed by Brazil and Portugal and so, Brazil achieved its independence and got the status of Empire with almost no blood spilled (Oliveira, 1995; pp. 426-428).

Since the end of the Napoleonic wars the Portuguese situation worsened over time. The metropolis was occupied for several years by French forces. When Brazil became independent Portugal lost the last major colony of the empire and the only colonies left were some outposts along the coast of Africa and some small colonies in Asia. Moreover,

the slave trade was forbidden in the Vienna agreement. As we have seen the main commercial activity of Portuguese Africa was the export of slaves. So, in the span of 20 years Portugal had been occupied, lost its mayor colony and the main commercial activity of its colonies in Africa was forbidden. Although we have to keep in mind that the slave trade was forbidden, but not the use of slaves. Portuguese colonies and Brazil, as every colony in the world, continued making extensive use of slave labor in its plantations until the end of the 19th century.

During the Berlin conference Portugal received two considerable pieces of land in Africa: Angola and Mozambique. Since Portugal got Mozambique and Angola, it promoted the production of raw materials along with protectionism for its African colonies. Those raw materials did not end up promoting the Portuguese industrialization, instead they were sold to other European countries. As we can see, the Portuguese Empire would never had the importance it once had, and as time went by, the role of the colonies would decrease while the industry and trade with Europe would gain importance (Lains, 1998; pp. 235-260).

5. CONCLUDING REMARKS

Throughout this paper we have studied the history of the Portuguese Empire during the Early Modern period. I reckon we can define the Portuguese Empire as an Empire with 3 different dimensions: Africa, Brazil and Asia. Each dimension would have its own years of importance. For instance, at the beginning all the interest focused in Africa, from 1415 to the end of the 15th century. Then the Asian dimension became the most important between the 16th and first half of 17th century. After the crisis of the 17th century Brazil drew almost all the resources diverted to the colonies, and it would continue absorbing them until its independence.

At first each dimension was absolutely independent from the other two dimensions, all the connections had to go through the metropolis. However, as time went by, connections between the different dimensions began to happen. We have already seen the strong trade bonds between Africa and Brazil, and how fundamental African slave trade was for the development of Brazilian plantations. At the same time, products from Brazil were exported to Africa in payments for those slaves, mainly Bahian tobacco. The *Estado da India* was the dimension less linked to the rest of the Portuguese properties. We have seen how important the intra-Asian trade was for the *Estado*, and at the start connections happened only between the metropolis and Goa. But with the time, trade connections developed between the *Estado* and the other two dimensions, mainly with Brazil. According to Ames (2000; p. 95-96) Bahian tobacco was exported to India, and during some years even the *Carreira da India* stopped in Brazil, where they sold spices and other Asian commodities in exchange for Brazilian gold. Lisbon showed its discontent with those connections more than once, and pushed several laws to try to limit them. Lisbon feared that if colonies could freely trade between them, they would realize they didn't need the metropolis and would pursue independence.

As we have seen, the history of the Portuguese Empire was a history of changes and turbulence. The Portuguese Crown showed its ability to handle those turbulences with

moderate success, but I think that the true virtue of the Portuguese Crown was its pragmatism and flexibility. The Portuguese were aware of their situation in the world, the capacities their country had, and they adapted to them. They knew they could not be the main power in all three dimensions. The Spanish Habsburgs for instance, did try to win in every single front they had, they tried to hold Flanders, to face the English and the French, to keep possession of Italy, colonize America and to fight the infidel. The result of trying to keep everything and win in every single front resulted in failure in all of them, except in America where they were able to maintain their rule.

However, the Portuguese Crown did not try to strengthen all the three dimensions, instead they would focus on strengthening one and exploiting it. This can be seen in a debate that happened in the Portuguese court between 1530 and 1540. According to Subrahmanyam (2012; p 87) the debate was about which one of the dimensions should be abandoned in order to be able to strengthen the other two. This debate is a perfect example of the realism and pragmatism the Portuguese Crown practiced during the Early Modern period. Furthermore, the Portuguese showed an extreme flexibility to adapt to the new situations, for instance when losing ground on the Indian Ocean, they did not hesitate to almost abandon it and focus in Brazil instead. I reckon that without that pragmatism and the flexibility to adapt to the new situations the Portuguese Empire could have never been as successful as it was.

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