

Between Fascism and Conservative Authoritarianism. The Estado Novo Regime in Portuguese History Textbooks (1975-2023)

**Entre fascismo y autoritarismo conservador.
El régimen del Estado Novo en los manuales
de historia portugueses (1975-2023)**

**Entre o fascismo e o autoritarismo
conservador.
O regime do Estado Novo nos manuais
escolares portugueses de história (1975-2023)**

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Abstract. In Portugal, the dictatorial Estado Novo regime (1933-1974) ended with the Carnation Revolution of 25 April, ending thirteen years of colonial war on several fronts. Since then, the regime has been the subject of an intense historiographical debate that has ultimately covered its multiple dimensions and realities. Part of this debate has focused on its possible “fascist” nature. This text aims to use a comparative methodology (qualitative and quantitative) to analyse post-25 April history textbooks to see how the approach to the dictatorship might have evolved.

Keywords: Estado Novo (New State) regime; Fascism; Textbooks; History Teaching.

Resumen. En Portugal, el régimen dictatorial del Estado Novo (1933-1974) terminó con la Revolución del 25 de abril, que también acabó con trece años de guerra colonial en varios frentes. Desde entonces, el régimen ha sido objeto de un intenso debate historiográfico que ha acabado por abarcar sus múltiples dimensiones y realidades. Parte de esta discusión se ha centrado en su posible carácter “fascista”. El objetivo de este texto es, mediante una metodología comparativa (cualitativa y cuantitativa), analizar los manuales de Historia posteriores al 25 de abril para percibir la posible evolución en el enfoque de la dictadura.

Palabras clave: Estado Novo; fascismo; manuales escolares; enseñanza de la Historia.

Resumo. Em Portugal, o regime ditatorial do Estado Novo (1933-1974) terminou com a Revolução do 25 de Abril, que pôs também fim a treze de anos de uma guerra colonial em várias frentes. Desde então, o regime tem sido objeto de um intenso debate historiográfico que, em última análise, abrangeu as suas múltiplas dimensões e realidades. Parte dessa discussão tem gravitado em torno da sua possível natureza “fascista”. O objetivo deste texto é, usando uma metodologia comparativa (qualitativa e quantitativa), analisar os manuais escolares da disciplina de História do pós-25 de Abril, de modo a perceber a possível evolução na abordagem da ditadura.

Palavras-chave: Estado Novo; Fascismo; Manuais Escolares; Ensino da História.



1. Introduction and Research Problem

When the *Estado Novo* regime was born in 1933 with the promulgation of the new political constitution, the country had already lived under a dictatorship for several years. In fact, since 1928, the Minister of Finance, António de Oliveira Salazar, had been drawing up the outlines of a political solution that in many ways resembled Italian fascism. One of the most vital features of this discourse was the critique of demo-liberalism, particularly epitomised by the First Republic (1910-1926). But in announcing a “new state”, Salazar was not necessarily preaching the advent of the “new man” but rather the concept of “living as usual” in the modest (and rural) “Portuguese home” (Rosas, “O Salazarismo e o Homem Novo”).

On the other hand, the regime originated in the context of a military dictatorship, without the paramilitary movement that had been the usual leader’s route to power. In contrast to the historical experience of most of the extreme right in Europe, the regime survived the Second World War. It was overthrown by revolution in 1974 after a thirteen-year colonial war. Again, there are some differences with neighbouring Spain, which is often the subject of comparison, as the Franco dictatorship lasted until 1975. In fact, Francoism was born in the context of a civil war (1936-1939), during which it tamed the fascist Falange movement, promoted the decolonisation of Morocco and Equatorial Guinea in the 1950s and 1960s, ultimately ending with the death of the dictator and the transition to democracy.

Indeed, the “Carnation Revolution” of 25 April 1974, which began as a military coup, marked the end of 48 years of dictatorship in Portugal and opened the door to profound political, social, economic, cultural, and educational changes. During the *Estado Novo*, “illiteracy rates remained high”, especially among women. The school “in this historical period served essentially as a tool for the indoctrination of children and the dissemination of propaganda about the ideas of the government” (Cavaco 22). In this sense, historical discipline and knowledge were at the heart of this approach. Both reading materials and history textbooks promoted a heroic vision of exemplary figures, drawing on the sacrificial Christological model and the Horatian motto *dulce et de-*

corum est pro patria mori. These “heroes” were based mainly on facts but also on myths and traditions from the Middle Ages and the “Age of Discovery” – a kind of “Golden Age”. These “heroes” represented values but also eras and ended up overlooking economic and social aspects considered trivial and of little relevance to the “rise and fall” narrative. The emphasis was not so much on the question of the “fall”, which was almost always associated with the defeat at the Battle of Alcácer-Quibir (1578) in Morocco and with 19th-century liberalism and the First Republic. The emphasis, of course, was on the supposed “revival” of the nation’s essence when Salazar came to power.

The April Revolution thus led to a new approach to teaching history. In addition to the end of the “single textbook”, a structuralist approach focused more on economic, social, and cultural issues. In this sense, the authors of curricula and textbooks followed the *Annales* School closely. Post-April historiography soon began to study the period that had just ended. In 1977, the *Comissão do Livro Negro sobre o Fascismo* (Black Book Committee on Fascism) was set up to “investigate the abuses committed during the dictatorial regime begun in 1926” (Morais 3). However, despite other similar contributions of the same period (Lucena) or later (Rosas, *O Estado Novo nos Anos Trinta; O Salazarismo e a Aliança Luso-Britânica; Salazar e os Fascismos*; Torgal, *Estados Novos, Estado Novo*; Loff), much of the subsequent historiography tended to see the *Estado Novo* as an authoritarian and conservative regime. Some “fascist elements” were clearly inspired by Mussolini’s regime, but it was not fascism *tout court*, so to speak, but rather “fascisation” (Pinto; Medina). Moreover, the question of movement/regime, the organisations that made up the *Estado Novo*, the corporatist nature of the regime and whether it was totalitarian or not, the dichotomy between discourse and reality, and even the charisma that Salazar (did not) possess were, and still are, at the centre of the arguments put forward by these authors.

This is why the question of how school curricula and textbooks have incorporated this debate and the characteristics of the Portuguese dictatorship is so essential, especially since this debate has resurfaced in the historiographical panorama and public opinion. Therefore, this article aims to review how the *Estado Novo* has been treated in 9th-grade history textbooks in Portuguese primary education schools



from the late 1970s until today. It should be noted that this is the last year of compulsory schooling in history for pupils aged 14, and most of them will never have contact with the subject again.

In any case, this study will focus on the number of pages and the quantity/quality of the information provided (Pingel, *Guidebook on Textbook Research*), the choice of historical sources, and the relationships established with other dictatorships of the time (Fascism, Nazism, and Francoism). For the purpose of this work, the most representative Portuguese educational textbooks have been selected (i.e. those adopted by more schools and therefore reaching more students). After a section explaining the state of the art and the methodology, the structure of this study is divided into three chronological periods corresponding to the other sections, in which we present, analyse, and discuss the results:

- The post-25 April period;
- The 1990s and the early years of the 21st century;
- From curriculum objectives to Essential Learning.

2. State of the art and methodology

Since their inception, textbooks have played a vital role in teaching and learning. Over time, their definition, status, and functions have changed and been (re)interpreted. Their structure, organisation, and dissemination processes have evolved and adapted to the needs of different eras and regimes – liberalism, fascism, communism, (neo)colonialism, among others – while always serving states and political and economic powers in their need for centralising and controlling education systems (Tormenta 193). Moreover, as Falk Pingel notes (*Guidebook on Textbook Research* 7), “textbooks are one of the most important educational inputs: texts reflect basic ideas about a national culture, and (...) are often a flash-point of cultural struggle and controversy”. For example, on the inculcation and reinforcement of nationalist values and sentiments, see the works of Celine Maillard, *Rewriting the Nation: Language Planning and Textbooks in French Primary Education during the Third Republic*, which deals with the impact of the Franco-Prussian conflict on textbooks; or Yoram Bar-Gal, *Propaganda and Zionist Education*

– the JNF 1924-1947; and Nurit Peled-Elhanan, *Palestine in Israeli School Books: Ideology and Propaganda in Education*, which shows how Israel's ideological and socio-political goals were put into practice through the pages of textbooks adopted by the Jewish education system.

Although some work on textbooks dates back to the late 19th century (Fuchs e Henne 25-56), it wasn't until the second half of the 20th century that interest and research developed and gained momentum, partly through Georg Eckert's studies of textbooks in Nazi Germany. Since then, and particularly since the 1970s, when this field of study was revived, many authors have devoted themselves to the analysis of textbooks. Mentioned should be made of the work by several authors: Alain Choppin (“L'Histoire des Manuels Scolaires”; *Les manuels scolaires: histoire et actualité*; “O historiador e o livro escolar”; “Le manuel scolaire, une fausse évidence historique”) and other French-speaking authors such as Roger Seguin and Joseph Poth, who carried out studies for UNESCO; the Germans Falk Pingel (*The European Home: Representations of 20th Century Europe in History Textbooks; Contested Past, Disputed Present; Guidebook on Textbook Research; History Education and Reconciliation*) and Eckhardt Fuchs (*The Palgrave Handbook of Textbook Studies*); the Spaniards Agustín Escolano Benito (“The manual as text: the construction of an identity”; “El libro escolar como espacio de memoria”; “El manual como texto”) and Rafael Valls Montes (*La dimensión europea e intercultural en la enseñanza; Los procesos independentistas iberoamericanos en los manuales de historia; La historiografía escolar española*), and the Mexican Eugenia Roldán Vera.

On the same timeline, textbook repositories were established, for e.g. the *Georg Eckert Institute* – now the *Leibniz Institute for Educational Media | GEI*, once part of the institution founded in the 1950s – which houses the most complete collection of textbooks in the world; the *Emmanuelle*, a database created in 1980 by Alain Choppin, which collects all editions of textbooks published in France since 1789, for all subjects and all levels of education; the *Centre d'Études, de Documentation et de Recherches en Histoire de l'Éducation (CEDRHE)*, founded in 1992 by Pierre Guibbert at the University of Montpellier, which collects textbooks, guides for teachers and students, and other teaching resources, including audio and visual materials, for all levels and subjects from the time of Jules Ferry to the present day.



Research projects and networks have also been set up, such as IAR-TEM, *International Association for Research on Textbooks and Educational Media* in Norway in 1991; MANES in Spain in 1992, which later led to the creation of the database with the same name, based at the Universidade Nacional de Educación a Distancia (UNED); the *Les Manuels Scolaires Québécoises* project in Canada in 1993; the LIVRES, Banco de Dados de Livros Escolares Brasileiros at the University of São Paulo in 1994; the HISTELEA, *Historia social de la enseñanza de la lectura y escritura en Argentina* in 1996 in Luján; the INDIRE, *Istituto Nazionale di Documentazione per l'Innovazione e la Ricerca Educativa* in 2001 in Italy; the Núcleo de Pesquisa em Publicações Didáticas (NPPD) of the Federal University of Paraná (UFPR) in 2002 in Brazil; the CEINCE – *Centro Internacional de la Cultura Escolar* founded in 2006 in Berlanga do Douro, Soria, Spain; and, more recently, the NISSEM, *Networking to Integrate SDG Target 4.7 and SEL skills into Educational Materials* in 2018.

Despite the lack of a repository in Portugal, textbooks have been attracting increasing academic attention since the late 1980s and, more recently, in the public sphere. While the first studies dealt with the issue of ideology(ies) and focused on the French Revolution (Torgal, “A Revolução Francesa no Ensino das História em Portugal”) and the “characterisation of paradigms of heroism in school textbooks” up to 1939 (Matos), subsequent contributions sought to extend this period to the *Estado Novo* (Torgal, *História e Ideologia*) and to discuss national identity and ideology in textbooks from the democratic period, i.e. after 25 April 1974 (Mendes). Other authors have looked at the process of “production and representation” (Magalhães, “Um Apontamento para a História do Manual Escolar”), the relationship between “law and the market” (Magalhães e Castro) or the textbook as a “historiographical source” (Magalhães, “O Manual Escolar como Fonte Historiográfica”), and some have highlighted the link between curricula, textbooks and teacher training (Solé, “Ensino da História em Portugal”).

It is also important not to lose sight of the issue of comparative studies, in particular between Portugal and Brazil (Afonso and Alves), or the perception of the European Union based on textbooks from five countries (Serrano and Neto). The issue of visions of Europe has already been the subject of another study but is based on Portuguese primary school textbooks published between 1900 and 1926 (Pintassilgo and

Costa). In addition to studies of the impact and reception of textbooks and research on how they are taught, used, and understood, recent trends include research on the representation of others and minorities, gender issues and national identities, slavery and racism, Europeanisation, and transnational perspectives. In this context, it is worth noting that one of the most active lines of research in school textbooks has sought to debate Eurocentrism and the colonial footprints that can still be seen today, defending the need for its renewal and decolonisation (Araújo and Maeso), but also recommending greater attention to gender issues (Cabecinhas and Balbé).

There has also been an increase in master's and doctoral theses in the country's various universities. In February 2023, the Network for the History of Pedagogy, Cultural Heritage and Teaching Materials was created and publicly presented at a conference, bringing together Portuguese, Spanish, French, Brazilian, Cape Verdean, and Guinean researchers. The study of textbooks has thus become a vast, inter- and multidisciplinary field that has increasingly opened up to new fields, methods, and research perspectives in recent decades.

In light of all these contributions, this study of the representation of the *Estado Novo* regime in school textbooks published after 25 April 1974 aims to adopt a comparative methodology between different periods and authors. At the same time, it will attempt to conduct a qualitative analysis (concepts used, sources selected, iconography) and a quantitative one based on the number of pages and paragraphs devoted to each theme. Considering Falk Pingel's conceptual models, the percentage of space devoted to a given theme allows for a better understanding of how it is prioritised in educational policy (*Guidebook on Textbook Research* 67). It also makes it possible to assess the degree of autonomy and freedom the author(s) had (or did not have) in explaining the themes.

It is also important not to lose sight of the fact that, especially in recent years, there has been a particular "editorial hegemony". It means that two or three publishers are responsible for producing all the textbooks, whereas, in the 1980s and 1990s, this task was distributed more widely. This is important because the narrative now seems increasingly unified, whereas the author's or authors' voice was previously more straightforward. On the other hand, as we shall see, the Ministry of

Education has also contributed to this more unambiguous view of processes and events by publishing various guidelines for teachers and authors. In light of the historiographical debate around the *Estado Novo* regime, it will be interesting to see how the authors articulate these official statements with the state of the art in historiography.

3. The aftermath of 25 April

Even during the revolutionary process of April 1974, one of the first history textbooks to be published at the time, with a language and line of analysis intensely coloured by the events of the time, stated that fascism “happened in Japan, Spain and Portugal”, as shown below:

On 28 May 1926, a military revolution installed a capitalist government at the service of the upper bourgeoisie: it institutionalised the political police (PIDE), established concentration camps (Tarrafal) and nationalist organisations (the Legion and the MP), strengthened national values (the Day of the Race), consolidated imperialism through a so-called overseas empire (colonialism), and created and centralised the productive apparatus in the state (corporatism). Fascist regimes are, therefore, the main pillars of totalitarianism [...] the defence of the elites, the privileged, monopoly capitalism and landlordism (Reis, *História 3.º Ano do Liceu* 83-85).

This extract recalled some of the revolutionary struggles of April, such as the need for agrarian reform to counteract the dominant structure of the landed estates in the south of the country. It also simplified the transition from the military dictatorship to the *Estado Novo*. By placing it squarely in the political realm of fascism – more specifically, in the sub-theme of “The Rise of Nazism and Fascism” – it also left no doubt as to its totalitarian nature, especially given the political police and nationalist organisations.

On the other hand, it stated that the regime was serving the “upper bourgeoisie”, whereas the outgoing demo-liberal First Republic had been “at the service” of the petty bourgeoisie and the middle class. This passage defined the entire military dictatorship and the *Estado Novo* (around 2.6%), as the regime was never mentioned again in the text-

book. In keeping with the *zeitgeist* in which it was written, the focus of the 9th-grade textbook (number of pages, documents reproduced, and tone of discourse) was on a detailed characterisation of the countries that made up the “socialist world” and those that were part of the “non-aligned” movement. The historical proximity and the peculiar timing of its writing undoubtedly dictated the almost pamphleteering tone, the “revolutionary” language used, and the succinct conclusions drawn. The final bibliography included works by Álvaro Cunhal (General Secretary of the Portuguese Communist Party), Charles Darwin, Lenin, François Mitterrand, Joseph Proudhon, Joseph Schumpeter, John Reed, Mário Soares (leader of the Portuguese Socialists), Arnold Toynbee and Mao Zedong (Reis, *História 3.º Ano do Liceu* 112).

Other textbooks from the 1970s written by the same author essentially reproduced their 1975 predecessor: they characterised the regime of the First Republic in two words, “inconsequential parliamentarian”, and reaffirmed the “fascism” of the *Estado Novo*, defining it as “state monopoly capitalism” (Reis, *História: Revolução Industrial/Mundo Contemporâneo* 57). Similarly, despite the end of the revolutionary period, they continued to write the final pages in the future tense, stressing the role of Portugal: we could “situate the construction of Portuguese socialism between the capitalist world [...] and the Third World [...] in the common task of reconstructing itself from the ruins of fascism” (Reis, *História: Revolução Urbana - Revolução Industrial* 155).

The textbooks of the 1980s, in turn, nuanced these somewhat pamphleteering explanations and defined the future explanatory model of the *Estado Novo* for subsequent decades. It is worth noting that the first guiding document included Content 7.2 under Theme 7, “Europe and the world between the two great wars”. This included the “Great Depression” of the 1930s and “the difficulties faced by democracies and the attempts to overcome them: fascism, corporatism and the experiments in social democracy”. In this respect, in the Portuguese case, after explaining the central policies of the First Republic, the emphasis should be placed on “the fall of the republican regime and the establishment of the Salazar dictatorship” (Portugal, *Programa Curso Geral Unificado História* 19).

On the other hand, the same document covered the second phase of the *Estado Novo* in Theme 8, “Europe and the world from the Second

World War to the present”, based on Section 8.5. “Portugal’s economic, social and political development: the crisis in the rural world and emigration, opposition to the colonial regime and the colonial wars. The 25 April Revolution and its significance” (Portugal, *Programa Curso Geral Unificado História* 21). The use of the term “fascist” was by no means clear in either content. In fact, based on a list of terms presented for Section 7.2., the Portuguese regime could be described as a “dictatorship” or an “authoritarian-corporate state”.

In this sense, it can be said that almost all textbooks from the 1980s to 2023 fall into the first of the three categories proposed by Herlihy, the “expository-descriptive” register (7), in terms of the presentation of the curriculum. The other two categories include an “explanatory” or “investigative-argumentative” paradigm. As we will see below, while the Ministry of Education referred to the scientific and research *ethos* required for the student’s profile in its legislation since 2013, the textbooks still reflect the first category theorised by Herlihy. Several other researchers have also argued that this profile has never been fully implemented (Sousa 119).

Using an “expository-descriptive” discourse similar to the work of teachers in the classroom, history textbooks have taken on a stereotypical form: double-page spreads containing explanatory text, written, iconographic, and statistical documents, and definitions of concepts and exercises. In general, the questions to be answered by the students refer to historical sources, while the explanatory text first summarises more or less recent historiographical works and then summarises the teacher’s presentation in class. Outlines drawn up at the end of the unit or topic give students a more precise view of the knowledge to be acquired and tested in the written assessments (Solé, “Ensino da História em Portugal” 42).

In this context, it is worth noting that since the 1980s, all history textbooks have included the *Estado Novo* regime in the chapter on the experience of the power of the European extreme right in the inter-war period, although the topics have been arranged differently. The first of these layouts explained the history of the *Estado Novo* from 1926 to 1974 in a total of eleven pages, or 4.3% of the textbook (Neves, *Nova História* 9).

The second layout, which is still in force today, recounts the end of the First Republic, focusing mainly on economic and social issues, and then describes the “28 May 1926 events” (military coup) and the “establishment of the dictatorship”, which included the “golden” and “fascist” period of the *Estado Novo*. Following other scattered topics (the Second World War, the Cold War, the Non-Aligned Countries, etc.), the theme was revisited in a second historical moment, this time covering the evolution of the regime after the Second World War, the rise of the opposition, the colonial wars (1961-1974) and the end of the regime during Marcelo Caetano’s executive presidency. Regarding the pages of this second layout are concerned, the following sub-items must be considered:

| Author/Year | Title | 1st Part (1930-1940) | 2nd Part (1950-1974) | Percentage (of the whole textbook) |
|-------------|-------------------|-------------------------|-------------------------|--|
| Guerra 1984 | <i>História 9</i> | 76-83 | 178-181 | 6% |
| Diniz 1988 | <i>História 9</i> | 82-85 | 222-235 | 7% |

There is also a third case in which the author started using the second layout after using the first one (see the first example).

| Author/Year | Title | 1st Part (1930-1940) | 2nd Part (1950-1974) | Percentage (of the whole textbook) |
|-------------|---------------------------------------|-------------------------|-------------------------|--|
| Neves 1989 | <i>À Descoberta da História 9</i> | 82-85 | 222-235 | 6% |

Although, in percentage terms, there doesn’t seem to be much difference between the treatment of the subject in the early and late 1980s textbooks, the truth is that the number of pages increased when it came to the “second part” of the *Estado Novo*. This was undoubtedly the result of the historical distance, but it was also better structured, placing the regime in the context of Europe and the world. The first moment of the regime was (and is) thus included in the chapter on authoritarian (and totalitarian) experiences: Fascism, National Socia-

lism, Stalinism, and Francoism, while the second moment emerged in the context of independence in Asia and Africa, but benefited from the inclusion of many other elements, in Portugal and worldwide, which were ultimately at the origin of contemporaneity. This logic, which we can still see today, runs through other subjects, such as the history of the USSR, which is divided into three or four parts: from Tsarism to Lenin's NEP; Stalinism; the Cold War and the expansion of the socialist model; and, more recently, *perestroika* and the collapse of the USSR.

In any case, one textbook from the period presented the *Estado Novo* as an "authoritarian regime" that initially succeeded: "In its first year in office, the budget was balanced and the escudo stabilised" (Guerra 82). By withdrawing political and civil liberties, the regime created an effective repressive apparatus to contain "growing discontent that gave rise to an increasingly broad opposition" (Guerra 179). For its part, another textbook also avoided the term "fascism" in favour of "dictatorship" and "authoritarianism", although it placed Salazar's regime in the "era of fascism" (Italian and German) in terms of time and page order. In short, in the words of the author, "the *Estado Novo* (authoritarian-corporative state) shared many features with Italian fascism, which had been its inspiration" (Neves, *À Descoberta da História* 9 67). It should be noted, however, that this textbook presented various images of the fascist "aesthetic" in Portugal, i.e. young people marching with arms outstretched. At the same time, it spoke of a "militarist state".

A third author described the regime as "fascist" or, in their words, "After 1945, the only countries where fascist regimes survived were Portugal and Spain" (Diniz et al., *História* 9 226). Among the sources chosen, there were two excerpts from Salazar's speeches, the following from 1940 being remarkable for its brutal brevity, transcribed here in full: "We claim to be anti-communist on the one hand, and anti-democratic and anti-liberal, authoritarian and interventionist on the other". In the same vein, the author also chose an image depicting the "aesthetics" of the time, with the following caption: "The Presidents of the Republic and the Council walk past rows of members of the Portuguese Legion, who give them the fascist salute" (Diniz et al., *História* 9 84).

In truth, this lack of consensus on the regime's definition goes beyond the discussion that post-25 April historiography has had about the nature of the *Estado Novo* (Rosas, *O Estado Novo nos Anos Trinta*). We

should also bear in mind the increasing historical distance between the fall of the regime and the April Revolution, as well as the upheavals of the 1980s – the effects of decolonisation, the intervention of the International Monetary Fund (IMF) in 1977 and 1983, and the reshaping of the political scene with the country swinging to the right under the ten-year rule of Cavaco Silva, supported by European Community funds. As we shall see, it could be said that the scholarly debate and the *zeitgeist* became synonymous with a shift in favour of the “fascistic” option (couched in different terms), but also “authoritarian” and “conservative”, which dominated the textbooks of the following decades.

4. The 1990s and the early years of the 21st century

Following the entry into force of the Basic Law on Education in 1986 and the publication of Decree-Law 286/89 of 29 August 1989, which approved the plans for primary and secondary education, curricula were stabilised. The aim was to “clarify the school system’s structure and avoid adopting piecemeal, sometimes incoherent or contradictory measures” (Campos 6). However, it was only two years later, in 1991, that the first normative document was published, the *Organização Curricular e Programa de História para o 3.º Ciclo do Ensino Básico* (Curriculum Organisation and History Syllabus for the 3rd Cycle of Basic Education). In the latter, the study of the *Estado Novo* was included in the 9th-grade curriculum under Theme 10, “From the Great Depression to the Second World War”, sub-theme 10.2, “Between Dictatorship and Democracy”, under the title “Portugal: The Salazar dictatorship”. In addition, the “Clarification of contents/specification of learning” proposed “the study, through significant cases, of the political situation in Europe between the crisis of 1929 and the outbreak of the Second World War”. In this sense, the Portuguese case “should be given special attention, and it would be beneficial to link it later with sub-theme 11.3 “Portugal: from authoritarianism to democracy”. In the “Strategies/Activities” section, it was suggested that “students collect oral testimonies about Salazarism and its institutions (the Portuguese Youth Organisation and the Portuguese Legion, political police, etc.) from older family members” and “organise a debate on authoritarian regimes and

human rights problems” (Portugal, *Organização Curricular e Programa de História* 71).

The *Estado Novo* was also covered in Theme 11, “From the Second Post-War Period to the Eighties”, under sub-theme 11.3, “Portugal: from authoritarianism to democracy”. The “Clarification of contents/specification of learning” section even mentioned:

Although the approach to Portuguese society’s recent past is probably more subjective than any other period, it is an excellent opportunity for the teacher to promote openness to differing opinions and put into practice values that are supposed to be consensual, such as freedom and democracy (Portugal, *Organização Curricular e Programa de História* 77).

The following strategies were suggested: “Read poems and listen to songs that reflect attitudes of protest against the Salazar regime”; “Read a part or the whole of a contemporary Portuguese novel that bears witness to the social conditions of the country (e.g. books by neo-realist authors from the 1940s and 1950s”); and “Students gather information either from published sources or from older family members, about the period under study” (Portugal, *Organização Curricular e Programa de História* 77). Interestingly, over the last fifteen years, this subject, along with the Holocaust, has been one of the most suitable for organising exhibitions and undoubtedly attracts the most visitors (witnesses and experts) to schools.

It should be noted, however, that this type of exercise is not without its difficulties. The students are not professional historians, and the issue of collecting and processing memories is a complex one, especially when we take into account very strong, even irreducible, opposing ideological positions and the problems that arise when interviewing people with traumatic memories, such as those of the colonial war or decolonisation. Moreover, the approaching 50th anniversary of 25 April and the growth of the extreme right in Parliament and the public sphere have led to a “memory struggle”. This debate has, in a way, sought to give the war a certain sense of heroism, to revalidate the lusotropical myths of Portugal’s supposedly “exemplary” colonisation, and even to suggest a rival date to 25 April 1974 – 25 November 1975 –, which would have marked the defeat of the far-left in all its aspects and the beginning of “true” freedom (Cardina, *O Atrito da Memória*).

To get a very clear idea of the space devoted to the *Estado Novo*, suffice it to say that the four textbooks consulted maintain the division between the first part (historical construction of the regime in the 1930s and 1940s) and the second part (from the end of the Second World War to the fall of the regime). In other words:

| Author/Year | Title | 1st Part (1930-1940) | 2nd Part (1950-1974) | Percentage (of the whole textbook) |
|----------------------|--------------------------|-------------------------|-------------------------|---------------------------------------|
| Crisanto et al. 1997 | <i>Novo História 9</i> | 118-125 | 224-235 | 8% |
| Alves et al. 2000 | <i>História 9</i> | 88-93 | 156-171 | 11.5% |
| Diniz et al. 2000 | <i>História 9</i> | 82-85 | 220-235 | 7.5% |
| Maia et al. 2000 | <i>Viva a História 9</i> | 102-105 | 182-191 | 7% |

It should be added that, with the stabilisation of the curriculum, many textbooks from the 1990s were updated and republished in the first and second decades of the 21st century. The textbooks from this period, therefore, tended to address the subject according to the following conventional pattern:

a) The construction of the *Estado Novo*: Salazar's slow rise to power; the creation of the "foundations of the regime, especially the *one-party system* and the new *Constitution*" (Diniz et al., *História 9* 124); as well as the repressive mechanisms and the organisation of the country's economic and social life into corporations);

b) The characteristics of the regime, the "isms": protectionism, colonialism, nationalism, corporatism, the cult of the leader, propaganda (Paulo, *Estado Novo e Propaganda em Portugal e no Brasil*), the one-party system, the suppression of fundamental freedoms, conservatism and authoritarianism, with some textbooks highlighting aspects of the nationalist educational process, proposing the *Decálogo do Estado Novo* (Crisanto et al., *Novo História 9* 119; Alves et al., *História 9* 91) as a document to be analysed by teachers and students;

c) The late economic development, especially the country's economic backwardness, the industrialisation in the 1950s, the migration to

Western Europe in the 1960s, known as the “mass exodus” (Diniz et al., *História 9* 224; Maia and Brandão, *Viva a História 9*, 2000, 186);

d) The opposition, namely the influence of the Portuguese Communist Party (PCP), the elections of 1945, 1949 and 1958 (Alves et al., *História 9* 164-165; Maia and Brandão, *Viva a História 9*, 2000, 184-185; Crisanto et al., *Novo História 9* 230-231), the violent and arbitrary actions of the political police, imprisonment and exile (Alves et al. 158-159; Diniz et al., *História 9* 226-230);

e) The colonial war and the liberation movements of the Portuguese colonies, in the context of the Cold War and the movements of the non-aligned countries (Diniz et al., *História 9* 230-235; Crisanto et al., *Novo História 9* 232-233; Maia and Brandão, *Viva a História 9* 188-189; Alves et al. 166-169). It should be noted that in this last book, the question of human and material costs was highlighted in the form of a subparagraph and that one of the documents chosen for the students’ analysis was the anti-war poem by Reinaldo Ferreira (later set to music by José Afonso and Adriano Correia de Oliveira), *Menina dos Olhos Tristes*.

f) *Marcelismo* (the last phase of the regime), which only the most recent debate in historiography has been able to remove from the buzzwords of the time, such as “Marcelist Spring”, “Salazarism without Salazar”, “Evolution in Continuity” – see also the more elaborate expressions used in historiography, such as “Failed Transition”, “Cosmetics”, and even Hamlet’s “to be or not to be” (Neto and Torgal 223). At the same time, the textbooks emphasise that the PIDE became the seemingly more benign General Directorate for Security (DGS), among other “cosmetic” examples (Crisanto et al., *Novo História 9* 234-235; Maia and Brandão, *Viva a História 9*, 190-191; Alves et al. 170-171; Diniz et al., *História 9* 230-231).

In addition to characterising the mechanisms of power, institutions and dynamics, the textbooks also focus on the prominent historical figures of the period. As one might expect, the most prominent is Salazar, followed by Marcelo Caetano, in addition to others: the Presidents of the Republic during this period, such as Óscar Carmona, Craveiro Lopes and Américo Tomás. Others are mentioned but not in too much depth, such as some of the most prominent ministers and secretaries of state, such as Adriano Moreira, Júlio Botelho Moniz, or Duarte Pacheco, among others. There are also references to the main political

opponents like Norton de Matos, Álvaro Cunhal, Humberto Delgado and Mário Soares, and to writers and artists like Aquilino Ribeiro, Abel Manta (Diniz et al., *História* 9 227), Fernando Lopes-Graça, Jaime Cortesão and José Afonso, with the lyrics of *Os Vampiros* (Crisanto, Rodrigues and Mendes; *Novo História* 9 235). In fact, some textbooks use intervention music because of the possibility of analysing the lyrics and deciphering sometimes hidden messages: *Trova do Emigrante e Trova do vento que passa* (Alves et al. 163). Some of the textbooks under review have short biographies of Salazar, Humberto Delgado (a political opponent eliminated by the PIDE) and Marcelo Caetano.

Regarding the view of the *Estado Novo*, it can be said that once this explanatory model was established, the most significant variation was in the number of pages. The various authors, or teams of authors, emphasised this or that aspect and characterised the regime in two phases: the historical construction period and the period from the end of the Second World War until 25 April. Finally, it should be noted that the textbooks studied, which included the *Estado Novo* in the chapter “Dictatorial Regimes in Europe” i.e. after the analysis of the Italian fascism, German national-socialism, and before Spanish Francoism, spoke of the “Salazar dictatorship”, but also of “fascist-type dictatorship” (Crisanto et al., *Olhar a História* 9 118) and “dictatorial regime similar to Italian fascism” (Maia and Brandão, *Viva a História* 9, 2008, 102). In other words, they supported the thesis of a “fascist regime” influenced by Mussolini rather than fascism. However, they did not discuss the complexity of the issue in depth.

5. From curriculum objectives to essential learning

From 2013, the contents set out in the *Curriculum Organisation and History Syllabus for the 3rd cycle of primary education* were combined with the *History Curriculum Objectives. 3rd Cycle of Basic Education*. Published in the 2013/2014 academic year, they “seek to [...] define basic, scientifically updated content [...], which is the main objective in the structuring of the teaching of the subject” (Portugal, *Metas Curriculares de História* 21). The topic in question was under the heading “From the Great Depression to the Second World War”, as part of the sub-heading “Crisis, Dictatorships and Democracy in the 1930s”, and more specifi-



cally under point 3. “Knowing and understanding the emergence and consolidation of the *Estado Novo* in Portugal” (Portugal, *Metas Curriculares de História* 25-26). Four of the objectives on which the textbooks were based dealt directly with the *Estado Novo*:

- Refer to the continuing political instability and financial problems in the early years of the military dictatorship (1926-1928).
- Describe the António de Oliveira Salazar’s rise to power within the military dictatorship (1928-1933).
- Compare the characteristics of the *Estado Novo* with those of the Italian and German dictatorships, identifying their similarities and differences.
- Characterise the repressive organisations and mechanisms of population control created by the *Estado Novo* (Portugal, *Metas Curriculares de História* 26).

The theme reappeared in the topic “From the second post-war period to the 1980s”, in the sub-topic “The Cold War”, more specifically in point 2, “Knowing and understanding the impact of the new post-war world order in Portugal”, which defined five more objectives for student learning; in point 4, “Knowing and understanding the consequences of the policies of the *Estado Novo* in relation to the post-war decolonisation process”, where four learning objectives were set. In point 7, “Knowing and understanding the disintegration of the *Estado Novo*”, where another four objectives were set (Portugal, *Metas Curriculares de História* 28-29) and in other words, the second period of the Portuguese dictatorship continued to have many descriptors, now called objectives. This was reflected in a more significant number of pages in the textbooks. It is also worth noting that for the first period, the focus was on similarities (but also differences) with other inter-war regimes for the first period, while for the second period, the links with the anti-colonialism that followed the Second World War were not as clear. On the other hand, the issues of the 1960s in particular (emigration, colonial war, decolonisation) are still very much alive in society, so a more in-depth treatment thereof would be recommended, bearing in mind the renewed debate in recent years on the issue of the “decolonisation” of school textbooks and the place of colonialism in the public sphere (Cardina, *O Atrito da Memória*).

The main effect of these changes was a slight shift from two to three periods in the approach to the Portuguese dictatorship, although the *Estado Novo* continued to be divided into two periods. In fact, in the second period, the themes were interspersed. Regarding page numbers, it was organised as follows: “Portugal: the *Estado Novo*”, in sub-chapter II.A “Crisis, Dictatorships and Democracy in the 1930s”, i.e. four pages; “The Constancy of Dictatorships in the Iberian Peninsula”, in sub-chapter III.A “The Cold War”, i.e. six pages”; and “Portugal: Backwardness and Emigration” and *Marcelismo*, also in sub-chapter III.A, i.e. four pages. In short, the *Estado Novo* takes up 6% of the textbook (Diniz et al., *História* 9, 2015).

It is also important to note that authors such as the aforementioned Maria Emília Diniz, continue to argue, as they did in textbooks of previous decades, that “Salazarism was a fascist-type of an authoritarian regime, with much in common with the Italian regime, but different in its conservative and Catholic nature” (Diniz et al., *História* 9, 2015, 94). The (inter)national debate on the nature of the *Estado Novo* has increasingly limited it to the realm of “conservative authoritarianism”, close to the Dolfuss regime (Griffin 58). Although some of the most influential Portuguese historians have embraced the “fascism” theory (Torgal, *Estados Novos, Estado Novo*; Rosas, *Salazar e os Fascismos*; Loff), the fact is that other historiographies have, from time to time, taken up the debate, insisting above all on the absence of a movement.

In this sense, the “fascists” would be the “blue shirts” (the name given to the National Syndicalists Movement militants in Portugal), led by Rolão Preto, which Salazar dismantled and integrated in 1934/1935, creating other organisations for this purpose, such as the ‘Acção Escolar Vanguarda’ (‘Vanguarda’ school activity) (later called ‘Mocidade Portuguesa’, Portuguese Youth Organisation) and the Portuguese Legion. Moreover, in 1936, a civil war broke out in Spain, Portugal’s neighbour, which could have shaken the *Estado Novo* if the leftist forces had won. In this way, the new organisations that were created to absorb a part of the “blue shirts” while responding to the challenge of the Spanish Civil War would have given a “fascist touch” or “flavour” to the conservative Salazar regime (Pinto).

Although the current curriculum guiding document, *Essential Learning. History – 3rd Cycle of Basic Education. 9th Grade* was publi-

shed in July 2018. Even though the *Curriculum Organisation and History Syllabus for the 3rd Cycle of Basic Education* and the *History Curriculum Objectives* – which coexisted with *Essential Learning* until the end of the 2020/2021 school year – were repealed by Order 6605-A/2021 of 6 July, in the case of the 9th-grade, it wasn't until the current 2023/2024 school year that the first textbooks produced following this document were used. It is true, however, that from the 2019/2020 school year onwards, the successive editions of the textbooks have undergone slight changes that in some way seek to meet the requirements of *Essential Learning*.

Generally speaking, the chronology, written documents, illustrations, and photographic enhancements used in the narrative of these more recent textbooks are simplified, as if in response to a demand for hyper-reality and an attempt to overcome a historical distance of many decades, certainly motivated by the presentism of traditional media and social networks. In addition, the loss of weekly teaching time in history has accelerated over the past decade, leaving less opportunity for more complex and lengthy analysis. This goes hand in hand with the belittling of the humanities (Nussbaum 38).

In any case, descriptors have replaced the objectives with the entry into force of *Essential Learning* in History. Thus, the *Estado Novo* appears in the organising theme “From the Great Depression to the Second World War” under the heading “The economic difficulties of the 1930s. Between dictatorship and democracy”, where only two descriptors refer to the Portuguese regime: “Explain the process of implementing the *Estado Novo* in Portugal, highlighting the role of Salazar” and “Compare the *Estado Novo* with the main dictatorial regimes, identifying their similarities and differences” (Portugal, *Aprendizagens Essenciais* 8). Again, in the organising theme “From the second post-war period to the challenges of our time”, under “Portugal: from authoritarianism to democracy”, only four descriptors refer to the regime. This is a significant reduction in content, which will probably be reflected in the number of pages and the more simplified approach of future textbooks. Examples of descriptors in textbooks:

- Relate the continuation of the authoritarian regime in Portugal to the Cold War.

- Identify periods of economic stagnation and development from the Second World War to 1974 (rural backwardness and migration, measures to promote industry, and opening up to foreign capital).
- Explain the domestic opposition to the regime.
- Analyse the colonial war in terms of its human and economic costs, both for Portugal and for the colonial territories, linking it to the refusal to decolonise (Portugal, *Aprendizagens Essenciais* 10-11).

As we have already said, the most recent textbooks have begun to adapt to this new transition, maintaining the two or three moments of the *Estado Novo* but moving closer to the binomial “rise and fall” for simplicity. It was also noted that the old historiographical question of whether the regime was 1. fascist; 2. of a “fascist type”; 3. more pronouncedly fascist until 1945; 4. only ideologically closer to Mussolini’s Italy persists:

The Estado Novo shared certain features with dictatorial regimes in Italy and Germany. It advocated the construction of a strong, authoritarian state headed by a leader obeyed by all; there was a single party (the National Union) composed only of regime supporters. Employers and workers organised themselves into guilds to end the class struggle and control those who opposed the regime. The homeland was placed above any individual value: Historical dates were commemorated, and the significant figures of the nation were glorified in an atmosphere of heightened nationalist sentiment. Despite these similarities, the Estado Novo differed from the Italian and German dictatorships in its profoundly conservative and traditionalist nature. It defended traditional values based on God, homeland, and the family, the fundamental triad of the Salazar regime. Salazar also rejected the highly violent and aggressive nature of the large mass demonstrations that were characteristics of Italian fascism and Nazism, which he considered to be pagan demonstrations, i.e. the idolatry of heads of state (Maia et al., *Viva a História* 9 96).

Other more recent examples claim that it was a “dictatorial regime” inspired by “fascist ideology”. However, despite some similarities “with Italian fascism, the *Estado Novo* was different. It stood out as a



conservative regime that defended the traditional values of God, homeland, and family” (Amaral et al. *História sob Investigação - 9.º Ano* 89-91). Another textbook pointed out that it was an “authoritarian, repressive and corporatist regime [...] with characteristics similar to Italian fascism and Nazism”. It also differed in its “deeply conservative and traditionalist nature [...] and was not in favour of large mass demonstrations” (Maia et al., *Vamos à História 9* 93). A third textbook, echoing Torgal (2009), described the *Estado Novo* as a “Portuguese type of fascism” (in the title), even though “Salazarism did not exactly fit in with the fascist doctrines of the rest of Europe, being a dictatorial authoritarianism with a Catholic and eminently rural slant” (Correia et al., *Procura - História - 9* 114).

| Author/Year | Title | 1st Part (1930-1940) | 2nd/3rd Parts (1950-1974) | Percentage (of the whole textbook) |
|------------------------|--|-------------------------|---------------------------------|--|
| Amaral et al. 2023 | <i>História sob Investigação - 9.º Ano</i> | 88-93 | 158-169 | 8.6% |
| Maia et al. 2023 | <i>Vamos à História 9</i> | 92-95 | 152-159 | 6.2% |
| Correia et al. 2023 | <i>Procura - História - 9</i> | 114-115 | 186-205 | 9.1% |

6. Conclusion

Undoubtedly, the *Estado Novo* is one of the most critical subjects in 9th-grade History regarding the number of objectives, descriptors, pages, and information. Covering forty-eight years of Portugal’s recent history, almost half of the 20th century, the dictatorship determined the lives of millions of people (in Portugal and the former colonies), several generations and a long and untimely thirteen-year colonial war at a time when migration to the centre of Europe was well underway. On the other hand, the political police (PIDE-DGS), the lack of fundamental freedoms, and “living as usual” limited the country’s rapproche-

ment with its European partners. In particular, the colonial question led to the concept of “proudly alone”, and the “Carnation Revolution” set a different course, establishing “democratisation, development and decolonisation” as the “three Ds” to be achieved.

The eradication of illiteracy and the universalisation of education were other flagships of the new regime. It was up to the subject of history to teach the past through a vision that was sometimes Eurocentric but freed from much of the nationalism of the “heroes” that made up the textbook ideology of the *Estado Novo* and focused on the values of democracy. Thus, the analysis of the latter regime began in the light of the revolutionary events of 1974/1975 and, in the 1980s, began to take on a form more similar to the current one. The structuralist model of the *Annales* School and the historiographical boom marked an entirely new way of looking at the (recent) past. However, as mentioned above, the colonial legacy is still very much present in Portuguese society. For this reason, part of the debate on the “decolonisation” of the “souls and minds” can be found in the classroom, the subject of history, and in school curricula and textbooks.

If the *Estado Novo* appeared in a single explanatory block, from its historical formation to the moment of its overthrow, the truth is that it is now divided into two phases: 1926-1945, considered here as the period of the “portal” to the military dictatorship; and 1945-1974. The chronological structure standard to other topics is more linked to this pattern than the historiographical impact. In other words, the 20th century was divided into shorter periods and given a globalising perspective: (inter)national politics, economics, society, culture, etc. The aim was to facilitate learning and to understand the *zeitgeist*.

Textbooks almost always refer to the *Estado Novo*'s ideological position, although they vary in their use of the term “fascism” and other definitions thereof (“fascist type”, “conservative authoritarianism”, and “conservative and Catholic nature”). Instead of debating, they list and analyse principles, institutions, practices, continuities, and ruptures. None of the textbooks analysed attempted to whitewash the dictatorship and its actions in any way. In other words, the concepts used seem to depend on readings and choices that naturally reflect the complex historiographical discussion about the regime's nature. It can be seen that sometimes a single textbook, in its page titles, explanatory texts,

or documents (written and iconographic), can present the various concepts of “fascist”, “fascistic” (which is not made explicit), or “conservative authoritarianism”.

It seems, however, that the condensation of the descriptors and the presumed reduction of the content of this and other subjects require deep reflection on the part of teachers and historians. This is all the truer given the amnesia typical of our times, the increasing disappearance of the main figures of history, and the rise of extremist and populist discourses which, on the occasion of the 50th anniversary of 25 April, have begun to debate its timeliness and legacy.

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