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> One element of success they [workmen] possess – numbers; but numbers weigh in the balance only if united by combination and led by knowledge.
>
> K. Marx, *Inaugural Address*, 1864

> As the translation of the *Manifesto* has shown once again, there seems to be no one over there who can convey our German (…). For that one must have literary experience in both languages, and not only the experience of writing for the daily papers.
>
> F. Engels, *Letter to Friedrich Sorge*, 1883, June 29

1. Introduction

The purpose of this article is to present an original and critical inventory of the most significant surveys, citations, discussions, and translations made of Marx's work in Portugal up until the First World War.

It follows on from a number of other studies that have looked at the dissemination of Marxism either from a broad perspective (e.g. Hobsbawm 1982) or through the comparison of national cases, looking for contrasts, similarities or mutual influences (Lampa 2010), or even considering national cases *per se* (e.g. Dommanget 1969; Ribas 1984; Potier 1986).

Adopting this latter perspective, we consider here only the Portuguese case, so that possible international comparisons involving this particular case will have to wait for subsequent studies. In any case, the different historical circumstances that affected various European countries will always present some difficulties in attempting to draw conclusions of a general nature.

It should be stressed that this paper seeks preferentially to identify Marxist literature *strictu sensu*, in particular that which was related to economic ideas, examining its reception within the Portuguese political and cultural

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context, and therefore not attempting to provide a detailed description of the social movements and institutions that were in some way linked to Marxism. This is, in fact, the perspective that was adopted by Hobsbawm in his above-mentioned seminal study of the subject, as well as in other studies referring to more recent historical periods, namely Abramitzky and Sin (2014). This latter study, however, had the dual particularity of examining not the increase, but rather the decrease, in the spread of Marxist ideas in a recent historical period and of using the quantitative approach, which is impractical in relation to the period that concerns us here.

Section 2 outlines the first references to Marx at a time when there already existed an associative movement in Portugal, namely under the form of mutual associations, but one that was not in a position to absorb Marx's socialist project, which was, in fact, still in its formative stages.

Section 3 describes the influx of Marxist ideas that positively affected the workers' movement and the references made to Marx in academic debates.

Section 4 sheds light on a third phase of interest in Marx's work, even though most of the intellectuals involved in this phase proved to be critical or hostile in their assessments.

Section 5 draws some conclusions, in particular, about the channels that existed for the spread of Marx's ideas to Portugal, identifying some patterns to be noted in the translation of his work, and looking at the ways in which these ideas were received and interpreted, both at an academic level and at the level of political action.

2. The first references to the writings of Marx

In the mid-nineteenth century, when Europe was just embarking upon the *Age of Capital* (Hobsbawm 1975), Portuguese society was only slightly affected by the modernity resulting from the Industrial Revolution. At that time, there was widespread popular discontent across the country as a result of the reforms introduced by the then triumphant liberalism, which had given rise to some rebellions in the 1840s, although the so-called Social Question did not exist in the same terms as those under which it was being addressed in the more advanced European countries.

Despite the country's economic backwardness, the almost complete absence of a modern proletariat (official records show that, in 1852, there were 362 factories with more than 10 workers, employing a total of 15,897 industrial workers out of a total population of roughly three and a half million inhabitants) and the lack of a revolutionary movement similar to the one that had swept across Europe in 1848, the political and cultural events taking place elsewhere were echoed to some extent in local Progressist intellectual circles.

The new ideals of economic equality and popular education enshrined in the ideological systems of revolutionary France reached Portugal, where they gave rise to the first workers' associations, a socialist press, and even occasional references to socialism in the literature being produced at universities. In popular magazines, such as *Eco dos Operários*, *A Península* or *A Esmeralda*, and even in a number of academic journals, most notably *O Instituto*, references to Proudhon began to appear, along with discussions (but not translations) of his ideas, mainly among the Progressist intelligentsia, and, by extension, also to the ideas of Marx, who was beginning to become known through this medium and thus exerted an influence on some of the authors who were more attentive to the transformations taking place in Europe.

Nonetheless, the most distinguished representatives of the first Portuguese generation of socialists, whose activity first began in the early 1850s, knew little of Marx. It was, in fact, Amorim Viana, a mathematics teacher who only occasionally espoused socialist views and did not explicitly quote Marx, who referred, in his critique of Proudhon's ideas, to the need to apply "[Hegelian] doctrines to political economy" in order to "give it a scientific and rational value" (Viana 1961 [1852–1853], p. 14).

José Oliveira Pinto, a student at the University of Coimbra, was, however, the person who produced the most sophisticated critique of Proudhon and who displayed some knowledge of Marx's theoretical positions, including *The Poverty of Philosophy*, the first major presentation of Marx's critique of political economy, which was then cited for the first time in Portugal. Pinto returned to the idea that "the method developed by Proudhon, who has declared himself a follower of Hegel, does, in fact, seem to me to be far from following that philosopher's methodological principles as faithfully as he would have us believe" (Pinto 1961 [1853], pp. 124–125), and, in particular, he criticised the supposed application of this method to political economy: "advantages and disadvantages: the good and the bad in every economic series – the division of labour, machinery, competition, monopoly, taxation, property, etc. – this is what Proudhon presents us with, instead of the dialectical process that he had promised us. Having arrived at this point, the creator of the new social economics is, as Marx says, no more than a bourgeois, for whom Napoleon seems to have been a great man because he did both very well and very badly. Proudhon's new organon is thus reduced to the proportions of a kind of economic Manichaeism" (Pinto 1961 [1853], pp. 128–129). Proudhon's own theory of value was torn to shreds, just as in Marx's book. Pinto then remarked that: "as Karl Marx has very judiciously noted, as long as man recognises that workers perform various functions, he recognises the division of labour; and, by recognising this, he recognises an order of production based upon this, he recognises exchange and therefore exchange value. So that,

ultimately, in seeking to explain to us how use value is transformed into exchange value, Proudhon recognises the existence of that transformation that has already been made" (Pinto 1961 [1853], p. 126). Despite making these critical remarks, neither Viana nor Pinto followed Marx in accusing Proudhon of misunderstanding the importance of the class struggle. Moreover, despite the implicit and explicit references to Marx, the relationship that these intellectuals had with Marxism proved to be episodic and incidental, so that Pinto could take Bastiat as "the greatest economist of the modern day" (Pinto 1961 [1853], p. 133). The very promoters of the burgeoning socialist movement were themselves also similarly influenced to a very large extent, firstly by utopian socialism and later by Proudhon, conceiving of social change as a consequence of the propaganda of ideas and not as a result of the struggle of the working masses, as would happen later. Utopian socialists, and Fourier more so than any other, had been known to Portuguese intellectuals since at least the mid-1830s (contrary to the utopian communists, and Cabet in particular, who had a notable impact in Spain, but not in Portugal), but, until the end of the century, it was Proudhon who remained the main reference for Progressist intellectuals, including some academics from the University of Coimbra. *The Principle of Federation*, which was perhaps the one work of Proudhon's that exerted most influence upon Portuguese intellectuals and their political programmes, was only translated in 1874, although the French edition had already been circulating for some time in Portugal.

So, despite the examples quoted above, the Marx of those years – strictly speaking still a pre-Marxist Marx – did not have any significant influence in Portugal, nor, most importantly, on the workers' associative movement, with only the aforementioned *The Poverty of Philosophy* having some local impact, perhaps because of the fact that this was the only book by Marx to have originally been written in French, which made it easier for Portuguese intellectuals to gain a greater knowledge thereof. Marxism came to Portugal early on, but not, in this first phase, through local translations of Marx, whose name remained, in fact, relatively unknown.

3. Under the auspices of the international and the Paris commune

In the two decades following the revolutionary turmoil of 1848, Portugal underwent a phase of capitalist development, partly supported by foreign capital, imported technology, and an active policy for the development of the transport system, displaying some industrial progress and even witnessing the strengthening of the labour movement, in particular the establishment of mutual associations, popular education societies, and cooperatives. The organisation of this movement was based at that time on the *Centro*

Promotor de Melhoramentos das Classes Laboriosas (Centre for Promoting the Improvement of the Working Classes), created in 1852, and ideologically underpinned by utopian socialism, and later by Proudhonism.

The situation, however, changed significantly in the early 1870s, primarily as a result of the growth of the working class itself, but also due to the major local impact of the Paris Commune, which marked the real take-off of socialism in Portugal and made Marx and the International Workingmen's Association (IWA) well known in Portugal. The Portuguese Federation of the IWA was thus created in 1871, shortly after the first links had been established via three Spanish anarchist militants temporarily exiled in Portugal.

The labour movement then adopted new forms of organisation, mainly consisting of trade unions. The most notable event at that time was the creation in 1872 of a first trade union confederation, the *Fraternidade Operária* (Workers' Brotherhood), which enjoyed a close relationship with the members of the IWA. This combination resulted in a change of tactics on the part of the labour movement, which began to make frequent use of strikes, as a weapon of struggle, and decided on a strategy of directly confronting capital.

Shortly before this, in 1871, the Democratic Conferences had been held at the *Casino Lisbonense*. More popularly known as the Casino Conferences, these meetings were promoted by a group of Progressist intellectuals, some of whom worked closely with workers' organisations, and resulted in a criticism of the liberal model that prevailed in the country. Their partial ban helped to establish a new generation of socialist sympathisers and to broaden their impact on public opinion. One of these lectures, which meanwhile had been banned by the government, was to have been given by Jaime Batalha Reis, a professor of economics and agronomy, and was designed precisely to expound the foundations of socialism, as formed by Proudhon, and later developed by Marx and Engels.

During these years, Proudhon continued to be the most important doctrinal reference in ideological terms (it was not by chance that Oliveira Martins, the main economist of this generation, used to keep a portrait of Proudhon in his office), enjoying the majority support of local Progressist circles and constituting a barrier to the spread of Marxism. However, somewhat surprisingly – because most of the defenders of international Proudhonism aligned themselves with the supporters of Bakunin – the Portuguese federation of the IWA showed itself to be politically aligned with the predominant Marxist faction of its General Council. Such an alignment, probably resulting from the influence and activities of José Nobre França, a print worker at the Official Printing Office and the secretary of the Lisbon federation of the IWA, was further encouraged by the

presence in Lisbon, in July 1872, of Laura Marx and Paul Lafargue, who represented the Portuguese federation at the Hague Congress in September of that same year, and by the contacts maintained with Engels by letter. Due to the decisions taken at this latter congress, the main trade union associations merged in 1873, followed, in 1875, by the foundation of the Socialist Party. This was, in fact, the first socialist party to be formed in Europe as a result of the Hague Congress, since this event even preceded the Gotha Congress, which was to give rise to the German Unified Socialist Party. In view of the good political relationship that the Portuguese "internationals" enjoyed with Engels, the latter informed the Portuguese federation of the IWA that he intended to write a small study about Portugal, which ended up never being written (Fonseca 1973, p. 69).

1872 also saw the appearance of *O Pensamento Social*, a journal published jointly by the Portuguese federation of the IWA and the *Fraternidade Operária*. This journal – which enjoyed the collaboration of Progressist intellectuals of various tendencies – made a decisive contribution to the political and cultural autonomy of the working class. It was in this journal that, in February of that same year the text *A Internacional* was published, written by Lafargue himself (*O Pensamento Social* No. 1), and that the first Portuguese translation of the *Communist Manifesto* appeared in 1873, albeit in instalments and in an incomplete form (only as far as the end of Chapter 2), because this same journal then interrupted its publication. This translation was the work of the above-mentioned José Nobre França, who based himself on the Spanish translation produced by José Mesa and published towards the end of 1872 in the Madrid daily paper *La Emancipación* (*O Pensamento Social*, Nos. 46–51). Immediately afterwards, the *Communist Manifesto* was published in book form, using the same translation as the one printed in *O Pensamento Social*, and some other versions were also published in socialist newspapers, particularly in *A Voz do Operário* and *Protesto Operário,* in 1887, and *Eco Socialista* in 1892, as well as a new edition in book form, published in 1893 as part of a collection entitled *Biblioteca Revolucionária Socialista* (Revolutionary Socialist Library). There were, therefore, several editions published of this text, and not just "one single Portuguese edition", as has erroneously been suggested (e.g. Hobsbawm 1982, p. 342).

In addition to the *Communist Manifesto*, Portuguese translations of the *General Rules* and the *Inaugural Address* of the IWA were also published (twice) in *O Pensamento Social*, in 1872 and 1873 (Issues Nos. 6 and 51 and Nos. 44 and 45, respectively). The *General Rules* were accompanied by the explanation that they had been revised at the IWA Congresses, but the text that was published was, in fact, the one that had been drawn up by Marx and published in November 1864 in London with an indication that they were the *Provisional Rules of the IWA*.

O Pensamento Social also published *A teoria da luta de classes,* in July 1872 (Issue No. 19), which was nothing more than an excerpt from Chapter 2 of Marx's *The Poverty of Philosophy* (translated from the Spanish version published in the newspaper *La Emancipación*), and a note written by Engels in his capacity as Secretary of the General Council under the title *AIT – Conselho Geral, Resoluções relativas ao Congresso Internacional* (IWA – Resolutions of the General Council relating to the International Congress), which stressed the need for the association to revise its statutes at the Hague Congress.

The publication of these texts showed that the Portuguese labour movement was gradually becoming receptive to Marxist ideas, with the main vehicle for their spread being precisely the translations that appeared in *O Pensamento Social.*

The continuing strategic proximity between the General Council and the Portuguese Federation led Engels himself to refer to O *Pensamento Social* as an "excellent paper" (Fonseca 1973, p. 69).

Anyway, direct personal contacts between the leaders of the IWA and the members of the Portuguese Federation amounted simply to the already mentioned meeting with Lafargue in Lisbon. No Portuguese leader took part in the IWA congresses. António Gomes Leal, a poet, a reader of Marx, and a friend of some socialist leaders, was the only Portuguese to take part in an IWA meeting, but he had no relevant doctrinal or political activity (Lima 1892, p. 339).

The German editions of *Das Kapital* did not reach Portugal and there was also no Portuguese translation. However, José Nobre França was given two copies of the French edition of Book I (translated by Joseph Roy) by Marx in 1873, which was probably only a part of the volume, as that particular first edition was published in the form of separate booklets between 1872 and 1875, one of which contained a personal dedication. At the same time, more than 150 copies of the work arrived at the international bookshop in Lisbon, where they were sold clandestinely. The large demand for the book was due not only to the fact that Marx was becoming a prestigious figure in Portuguese Progressist circles, but also because many of the militants who were more sympathetic to Marxism saw in this work an instrument that could be used to combat Proudhonism, which continued to exert an influence over the "literary youth" (Letter from José Nobre França to Marx, dated 17.8.1873, in Santos 1983, p. 34). During this same period, José Fontana, a man of Swiss-Italian origin and, at that time, the most prominent leader of the trade union movement, asked Marx for "some of his writings" (Letter from José Fontana to Marx, dated 20.12.1873, in Oliveira 1978, p. 51) to be read at a rally in support of the tobacco workers, who were on strike and being persecuted by their bosses

and the government. Such a situation does, in fact, demonstrate the prestige that Marx enjoyed at that time in Portugal.

Nonetheless, the philosophical and theoretical work of Marx and Engels remained largely unknown even among this vanguard of Portuguese workers. Apart from the above-mentioned *Communist Manifesto* and, to some extent, *The Poverty of Philosophy*, other important writings remained either unpublished or generally unknown. In 1859, Marx published *A Contribution to the Critique of Political Economy*, in German, which was a preparatory draft for his work *Capital* and in which he originally expounded his theory of value. This work did, however, have only a limited impact in Europe and remained unknown in Portugal. Afonso Costa mentioned the book in his doctoral thesis, noting that he "almost sums up the entire system [of Marx]" (Costa 1895, p. 68), but obviously he did not read it at all. Not even the gradual appearance of French translations was to significantly change the situation. For most militants, it was the linguistic barrier, and frequently the length and the difficulty of these writings, that meant that they were little read. Even texts of a didactic nature, such as *Wage Labour and Capital*, originally published in German in 1849, remained unknown, so that the exchange of letters with Marx or Engels only superficially affected their theoretical and doctrinal evolution.

So, the fighting spirit that these militants demonstrated probably resulted more from the example of the Paris Commune and their empirical observation of the living conditions of Portuguese workers, as well as the enthusiasm resulting from the first victorious strikes and their own capacity for reflection, than from any profound theoretical and political knowledge that they might have had. Despite their alignment with the Marxist faction of the IWA, most of the political and trade union leaders had difficulties in understanding the break that Marx had introduced into socialist theory and doctrine, with the result that Marx's own critique of Proudhon, which had in some way been adopted by part of the generation of the 1850s, was not entirely understood by the generation of the 1870s.

Many of this second generation of Portuguese socialists showed themselves to be more sensitive to the equilibrium of Proudhon's antinomies than they were to the class struggle and to defining the conditions under which they could break the hold of capitalism over the country. It was not by chance that they did not at that time produce any relevant theoretical discussion or any analysis of Portuguese domestic issues in keeping with a strictly Marxist methodology. The report sent by Nobre França to Marx is a clear example of this (letter from José Nobre França to Engels, dated 24.6.1872, in Oliveira 1978, pp. 19–34).

Meanwhile, Marx's ideas discreetly reached the attention of Portuguese academics. In 1872, the above-mentioned Jaime Batalha Reis introduced the

presentation of both the socialism of Proudhon and that of Marx and Engels into his classes at the *Instituto Superior de Agronomia de Lisboa* (Lisbon Higher Institute of Agronomy), which was precisely the theme of the public lecture that the government had banned shortly before this (Reis 1921, p. 2).

At around this same time, José Frederico Laranjo, who was a Law student at Coimbra University, made a brief reference to Marx's critique of Proudhon at a public lecture given in January 1874 on the origins of socialism (Laranjo 1873, p. 205). At a second lecture that he gave in November of that same year on the effects that the introduction of machinery was having on employment, he was already voicing his approval of the ideas of *Capital*, particularly Chapter XV of Book I, and was himself returning to the critique of Proudhon, quoting from *The Poverty of Philosophy*. His conclusion at that time was that "socialism is necessary, fatal and legitimate" (Laranjo 1874, p. 74).

None of this prevented the appearance of literature that was highly critical of the actions of the IWA and of Marxism. The most relevant example is that of Rodrigues de Freitas, a professor of Economics and a republican politician, who set about explaining the "doctrines of the International Workingmen's Association." In a text that proved to be more controversial than it was actually theoretical, in which he transcribed excerpts from the *Inaugural Address* and the *Communist Manifesto* and in which he referred to Marx's *Capital*, he accused the internationalists of "being ignorant of the most rudimentary economic truths", namely not knowing "how capital is created [since] if they had reflected upon this a little more, they would soon have noticed the harmony that existed between this and work" (Freitas 1872, p. 38). Shortly afterwards, an academic dissertation published at the University of Coimbra was to return to this theme in order to establish a critical pattern that was as superficial as it was violent in its opposition to the new doctrine: "[Marx is] an eminently analytical and erudite spirit, but unfortunately he has gone completely astray" (Calisto 1874, p. 82).

4. At the close of the nineteenth century

After this sudden surge of interest and influence of Marxist ideas on the labour movement and in some intellectual circles, there was a period of retreat, despite the industrial progress that was being achieved, particularly in the textile sector, and the continuous increase in the number of industrial workers, which by 1911 had risen to 98,511 people employed at factories with more than 10 workers (Carqueja 1916, p. 219). The trade union movement began to weaken, and the number of strikes that were called began to fall significantly from 1873 onwards.

As has already been mentioned, appearing at that time at the political level was the Socialist Party, which had been founded by former members of the local federation of the IWA. This party sought to maintain ideological and political links with international Marxism, despite the fact that the transfer of the General Council to New York and the subsequent dissolution of the IWA in 1876 made such links more difficult to preserve.

Anyway, the Socialist Party remained a small party that had only a limited influence among the working class, even after its merger with the Portuguese Region Workingmen's Association – an important trade union organisation – at a congress held in 1878, at which it received "greetings sent by Marx and Engels" (Nogueira 1964, p. 82).

Led for a long time by Azedo Gneco – a man of Italian origin who worked at the Lisbon Mint – this party had a predominantly reformist orientation, although it did, however, maintain Marxism as its general doctrine. Even when, in a letter to Engels, Azedo Gneco revealed his attempts to gain "some scientific knowledge" (letter from Azedo Gneco to Engels, dated 18.1.1876, in Oliveira 1978, p. 55), the result did not extend much beyond his acquiring a very basic knowledge of Marxism and his consequent incapacity to elaborate any coherent theory or doctrine for the party. The same Gneco also wrote in a letter to Benoit Malon, dated 5.7.1885, that "all I have of Marx is *Le Capital*, *La Misère de la Philosophie*, which I had in English, (…) and I do not even know if Marx has anything published in the languages that I understand" (Gneco 1933, p. 138). In fact, the Socialist Party did not manage to achieve a real fusion of Marxism with the Portuguese labour movement. The Marxist education of its members was quite rudimentary. Anyway, with all their limitations, Nobre França and Azedo Gneco were the two socialist political leaders who came closest to the ideas of Marx.

It was only in the 1890s that the labour movement significantly recovered its organisational capacity, increasing its power to make demands, and even improving its ideological consistency. This was particularly visible in the programme adopted by the Conference of the Socialist Party held in 1895, which set the aim of "conquering the State and its ramifications, thus completely acquiring all the elements of power necessary for the realisation of its idea" (Nogueira 1932, p. 36). However, the good relationship existing between the main figures of international Marxism and Portuguese socialists remained firm over these decades, with one exception. When Marx died in 1883, the Portuguese working-class press signalled the event with great emotion. Sometimes referring to him as "the valiant champion of modern socialism" (–, 1883a, p. 3) or to *Das Kapital* as "a genuine revolution, even in the *ex-cathedra* teaching of political economy everywhere where this teaching is not completely mummified" (–, 1883b, p. 3).

A few years later, in 1887, Engels himself was to confirm this good relationship: "at this moment the mass of European Socialists, in Germany and in France, in Belgium, Holland and Switzerland, in Denmark and Sweden, as well as in Spain and Portugal, are fighting as one common army under one and the same flag" (Engels 1887). Anyway, when the Second International was founded at the 1889 Paris Congress, the representatives of the Portuguese Socialist Party, who were directly participating for the first time in a great international socialist meeting, surprisingly chose to appear at the congress of the Possibilist faction and not at the congress of the Marxist faction (Nogueira 1964, p. 166–168).

Contrary to what had happened with the Portuguese Federation of the IWA and other socialist parties from Southern Europe, the Portuguese Socialist Party did not directly promote the publication of works of reference about Marxist thought, nor even its own publications devoted to the creation of Marxist theory. It restricted itself to the publication of journals, two of which, *Protesto Operário* and *Eco Socialista*, expressed the positions of the Marxist faction. Nor did they ever really apply Marxist categories to their analysis of the Portuguese reality in any consistent fashion, which was a consequence of their poor Marxist education.

Meanwhile, *Anti-Duhring*, a work that was also published in 1878 by Engels, contained a presentation of the Marxist positions with regard to philosophy and historical interpretation, a summary of the theory of value and surplus value and an analysis of the evolution of socialism, obtaining a significant impact in Europe, even though it did not yet do so in Portugal. Azedo Gneco, who was in dispute with the republican leaders, mentioned the description of the historic process contained in that text, which he did, in fact, quote from quite expressively, although he himself was an exception (Gneco 1883, p. 2).

In 1880, at Paul Lafargue's request, Engels took three chapters from *Anti-Dühring* and created *Socialism: Utopian and Scientific*, which became one of the most popular socialist pamphlets – and a kind of brief compendium of Marxism – at the time of the Second International. This book enjoyed a certain amount of dissemination in Portugal and seems to have been particularly influential, although it was only published here nine years later (Engels 1889).

Marx's *Capital* was also published in Portugal at that time, or rather there were two Portuguese publications of the book, in two different editions, both of which appeared in 1912, but only in the form of a translation of the survey of Book I published in France by Gabriel Deville in 1883 (Marx 1912a and Marx 1912b). This version omitted material that was dealt with in at least four chapters of the original text and was not particularly appreciated by Engels. It was a simplified text, designed to support

the training of socialist militants and providing them with access, albeit indirectly, to Marx's work. The other summaries and anthologies of *Capital*, which, having a similar aim to the one produced by Deville, circulated throughout Europe during this period, either remained largely ignored in Portugal, as was the case with the one produced by Carlo Cafiero, or were only occasionally mentioned, as was the case with those compiled by Paul Lafargue and Karl Kautsky, in their French and Italian versions.

Anyway, during this phase, Portuguese socialist leaders paid more attention to the action of French-speaking politicians, particularly Jules Guesde and Paul Lafargue, but also non-Marxist socialists, such as Benoit Malon and Emile Vandervelde, all of whom were frequently referred to in the Portuguese working-class press and whose writings were occasionally translated and published in Portugal, than they did to the founding fathers of Marxism. This circumstance certainly contributed to the simplified and schematic Marxism that permeated their analyses and their programmes.

Outside the Socialist Party, the most popular political theory and doctrine among the working class, particularly from the early twentieth century onwards, was essentially anarchist in nature, to the extent that, in 1913, a worker employed in the footwear industry, and a militant communist right from the very first moment, referred to the situation of his class in the following terms: "they used to talk about anarchism, and the bourgeoisie, quoting from books such as *The Conquest of Bread*, by Kropotkin, and *Between Peasants*, by Malatesta [both of which had been published in Portuguese versions at that time] (…). Today, however, I can recall that I never heard anybody talk about Marx or Engels" (Silva 1971, p. 27). In any case, the anarchist movement during this *fin-de-siècle* period in Portugal, which was represented above all in doctrinal terms by Silva Mendes, welcomed Marx's contribution in economic terms, describing him as "the most prestigious socialist [who] had already criticised Proudhon's economic ideas to some advantage and transformed the associative movement into collectivism" (Mendes 1896, p. 210).

There were some enduring effects resulting from the above-mentioned importation of Marx's *Capital*, Book I, although there were no mentions of Books II, III, and IV in the Portuguese political or academic literature of that time. The already mentioned José Frederico Laranjo, who had meanwhile become a teacher at the University of Coimbra, a member of the Progressist Party, and a member of parliament, devoted large attention to the text. In his lessons of political economy, which revealed an eclectic theoretical position, he gave some prominence to *The Poverty of Philosophy* and above all to *Capital*, quoting from them both on various occasions and concluding, for example, that "Karl Marx is the writer who deals with the question [of the effects of machinery on unemployment] in greatest depth"

and also that "the analysis of the socialist school is true" (Laranjo 1997 [1891], p. 48 and 50). Laranjo was, in fact, the first of the Portuguese readers of Marx to disentangle the analytical component of Marxism from its doctrinaire component and to readily accept some of the actual concepts of this theoretical system, which he used in the critique that he made of the liberal economists. It was precisely from this moment on that most of the academic treatises of political economy published in Portugal (especially those written by José Marnoco e Sousa, which reflected the teaching that was taking place at that time at the University of Coimbra) began to include frequent references to Marx. Such references became increasingly extensive and consistent in later editions of his treatise, particularly when he began to quote from *Capital* directly (Sousa 1907, pp. 27–33; 59–71; 212–217; 279–281). However, since they formed part of an eclectic theoretical vision, these references were never fully receptive to the idea of an opposition between the political economy of labour and the political economy of property, as Marx himself had suggested in the *Inaugural Address*.

During this period, the references to Marxist economics multiplied, particularly in academic papers and even in some dissertations. The most important of these works was perhaps the one written by Roberto Ferreira, a teacher at the *Academia Politécnica do Porto* (Porto Polytechnic Academy) and possibly the only one of these authors, besides the already mentioned Laranjo, to have read Book I of Marx's *Capital* in its full version, which contained the most detailed and correct exposition of the Marxist economic system published in those years (Ferreira 1889). Guilherme Moreira, a teacher at the University of Coimbra, also published a study discussing Marx's economic ideas about value, price, and profit, even though he displayed some clear errors of interpretation (Moreira 1891).

Besides these authors, there were also many others who referred to Marx, but who did so from a hostile and not always particularly profound perspective.

Their writings – and there were a good deal of them – can be divided roughly into three categories. The first group comprises texts that were produced with the intention of creating some controversy, being written by authors who mostly had not even taken much care when reading the writings of Marx, which they were so keen to criticise. A clear example of this attitude is provided by Basílio Teles, a well-known republican economist, who considered the Marxist theory of value to be wrong because he was unable to distinguish absolute value from relative value, and instead situated these concepts in analytical contexts that had nothing to do with Marxism, such as "self-retribution and social retribution" (Teles 1901, p. 13). Sampaio Bruno, a philosopher and an unorthodox liberal, who had returned from Paris, was another example of this attitude, although he had the unusual

particularity within the Portuguese context of that time, of peppering his frequent misunderstandings about Marx's economic theories with anti-Semitic statements about most socialist thinkers (Bruno 1893).

The second category consists of papers whose reflections were much broader in scope and more carefully considered. António Pires de Lima, who at the time was a Law student at the University of Coimbra, had the particularity of including in his critique of Marx a summary of the author's *Capital* – something that had never been done before – even though this was based on the *Extracts* published by Paul Lafargue. His theoretical digression and his criticism of the Marxist system contained important errors of interpretation and clearly demonstrated a number of perplexities about Marx's account of the capitalist economy. The conclusion that he reached, however, was the exact opposite of Marx's, although it was in keeping with the predominant mentality to be found among economists at the turn of the century. In particular, he concluded that "value does not have a fixed objective measurement, being dependent on conditions that are inherent to the individuals that exchange" and that, consequently "all value really comes from labour, but not the labour of the producer: it comes from the labour of the consumer" (Lima 1900, pp. 3 and 6).

Besides the strictly theoretical reasons invoked in these critical appreciations of Marxism, in many of them – and these amount to the third category – there was also an epistemological reason: the reading of Marx was frequently rendered impossible by the positivist view of the world – the philosophical movement that exerted the greatest influence in the last quarter of the nineteenth century in Portugal. This current of thought prevented people from understanding the more general relations underlying the capitalist economy, which was considered to be an arbitrary construction and which, in return, favoured a more immediate approach to the functioning of the economy. António Osório, who had had a neoclassical training, was perhaps the economist who most clearly expressed this attitude: "Marx clearly seems to derive most of his conclusions from the simple observation of the facts, and so he does not appear to step outside the field of science. In reality, however, his main propositions were put forward before and independently of the facts, from which he appears to deduce them. These facts were added to an already formed concept and an idea that had already been established" (Osório 1996 [1911], p. 4). This criticism of Osório's, which preceded a study of mathematical economics that had nothing to do with Marx, had the particularity of making it clear that the latter's contribution to political economy had become an unavoidable subject-matter, even in Portuguese academia.

Contrary to what happened in other countries of the European periphery, most of these intellectuals engaged in political discussions or in

abstract economic discussions, but they never offered any analysis or any policy recommendations that could help to foster the industrialisation of the country (Psalidopoulos and Theocarakis 2011, p. 172 and 178).

At the level of philosophical reflection, Marxism was a non-existent consideration during this period. The very expression "dialectical materialism", introduced by Engels in *Anti-Duhring*, did not figure at all in the Portuguese literature of this time. Although the bases of the materialist conception of history had already been enunciated in the *Communist Manifesto* – "the history of all hitherto existing society is the history of class struggles" – the expression "historical materialism" itself was only introduced by Engels at the beginning of the 1890s. In Portugal, it was rarely used, although Marnoco e Sousa did mention it, and in a highly critical manner, in the first edition of his treatise on political economy (Sousa 1900, p. 50). The most detailed analysis appeared in the later versions of his treatise, and, although he continued to interpret historical materialism in a crudely deterministic way, he did not fail to stress that "the importance of economic phenomena in social evolution has recently been highlighted by historical materialism, which has an exceptional scientific value in the contemporary scientific movement" (Sousa 1902, p. 52).

Bento Carqueja was the only academic to publish an essay containing a general presentation of historical materialism during these years. Being a professor of political economy at the University of Porto, he did not engage in historical research. Perhaps because of this, his approach to historical materialism was highly deficient. He referred to Marx's *Capital* by its German title, but he never quoted from it with any accuracy, and he did the same thing in relation to the only work by Engels that he referred to, *The Origin of the Family, Private Property and the State*, which he only mentioned by its German title, and then incorrectly.

Despite considering historical materialism to be "a fertile concept of the human mind" (Carqueja 1914, p. 53), he maintained the idea that it contained a fatal error: "historical materialism clearly contradicts itself when it proclaims, on the one hand, that the class struggle is the supreme law of history, and when it denies, on the other hand, that the action of these classes may sometimes have a decisive effect on the use of the economic process, which has to follow its own autonomous and fatal evolution" (Carqueja 1914, p. 50–51).

Running contrary to the main current of thought was Faria de Vasconcelos, perhaps the only explicitly Marxist academic of this period, who produced the first historical research to be supported by historical materialism (Vasconcelos 1900). In the first part of his dissertation, he correctly expounded the fundamental principles of historical materialism, seeking in the second part to apply these principles to his explanation of

the social significance and conditions of the religious reforms that had taken place in sixteenth-century Europe. He also projected his analysis onto a future time when religion would disappear as a feature of human societies. However, this study was not afforded any continuation in the main body of work of its author, a specialist in pedagogy, who did not become involved either in the discussion of economic themes or in any form of political intervention.

5. Concluding remarks

Now that an inventory has been made of the most significant citations, critical discussions, surveys, and translations made of Marx's works in Portugal up until the First World War, it must be stressed that Marx's ideas were received in a discontinuous form over time and, to a large extent, in the world of academia. The authors surveyed here were mostly students or teachers at the University of Coimbra, so that, in this context, they generally adopted an academic stance that, as a rule, was alien to the possible practice of socialist politics.

Even so, Alves Moreira was the only one of these academics to adopt political concepts that were close to socialism, although he did so on a purely intellectual, abstract, and non-militant level. There did not exist the figure of the university teacher who, in addition to his academic work, sought to disseminate the ideas of Marx in combination with a commitment to the socialist political struggle. Portugal did not have its Labriola, nor even a theoretician who had studied Marx's ideas in some depth and thereby achieved some international standing.

On the contrary, most of the commentators writing about Marx showed themselves to be non-Marxists or even anti-Marxists. They mainly displayed a positivist world-view, which led them to make frequent errors of interpretation. Nor did they show any great originality, generally repeating the arguments that were made in the literature that was circulating around Europe at that time. The fact that the generation of intellectuals who reflected upon the Portuguese situation at the turn of the century did not adopt Marxism as a guide – suggesting some "indifference to historical development" (Dias 1962, p. 289) – displays a certain similarity with the Spanish case, considering that the so-called Generation of 98, while still remaining anti-liberal, equally did not adopt Marxism as a significant reference. On the other hand, however, it does reveal a significant difference in relation to Italy, where a sizeable group of intellectuals from this *fin-de-siècle* period displayed their enthusiastic appreciation of Marx's ideas.

Most of Marx's writings were linguistically inaccessible to the Portuguese, who, with rare exceptions, had no contact with German culture.

Portuguese translations were infrequent and generally appeared somewhat belatedly, above all because the number of potential readers was small, and most intellectuals had access to Spanish and, in particular, French translations (both of the original texts written by Marx and Engels and of most of the secondary literature that came after them), even though this circumstance ended up imposing important limits on the access of the political militants to books and journals. In any case, it is quite significant to note that, in 1918, the library of the *Instituto Superior de Comércio* (School of Commerce), which at that time was the only school of higher education in Portugal offering the possibility of economic studies, still did not have any of Marx's books on its shelves (ISC 1918, pp. 181–216).

A different situation was to be found among the workers' leaders. Azedo Gneco noted precisely this in a letter that he wrote to Engels: "I have learned some languages just to be able to understand the books that I had to consult." (Letter to Engels, dated 18.1.1876, in Oliveira 1978, p. 55).

Nor did the economic and social conditions of the country help in the creation or dissemination of Marxist ideas. Anyway, despite the difficulty in measuring the impact of Marxism, there is no doubt that it had some local influence, especially in the 1890s, when its institutionalisation began to be noted in academic circles, but, even so, this all took place under conditions that confirmed Portugal's status as an intellectual periphery, in other words a country with a "high propensity to import ideas" (Maki 1996, p. 309).

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Appendix

Year	Works of Marx and Engels	First Portuguese translations, surveys or citations
1841	The Difference Between the Democritean and Epicurean Philosophy of Nature	
1843	Critique of Hegel's Philosophy of Right	
1844	The Holy Family Economic and Philosophical Manuscripts	
1845	Theses on Feuerbach The Condition of the Working Class in England	
1846	The German Ideology	
1847	The Poverty of Philosophy The Principles of Communism	
1848	Communist Manifesto	
1849	Wage Labour and Capital	
1850	The Peasant War in Germany The Class Struggles in France, 1848 to 1850	
1852	Revolution and Counter-Revolution in Germany The Eighteenth Brumaire of Louis Bonaparte	
1853		The Poverty of Philosophy (*)
1859	A Contribution to the Critique of Political Economy	
1864	Inaugural Address of the IWA	
1865	Wages, Price and Profit	
1867	Capital – Book I	
1871	The Civil War in France	
1872	The Housing Question	Communist Manifesto
1873		Inaugural Address of the IWA
1875	Critique of the Gotha Programme	
1878	Anti-Dühring	
1880	Socialism: Utopian and Scientific	
1883		Anti-Dühring (*)

(*continued*)

Year	Works of Marx and Engels	First Portuguese translations, surveys or citations
1884	The Origin of the Family, Private Property and the State	
1885	Capital – Book II	
1886	Ludwig Feuerbach and the End of Classical German Philosophy	
1889		Socialism: Utopian and Scientific
1894	Capital – Book III	
1898	Value, Price and Profit	
1905	Capital – Book IV	
1912		Capital – Book I (Deville version)

(*) Brief quotation.

Abstract

This article presents an original and critical inventory of the most significant surveys, citations, discussions and translations made of Marx's works in Portugal up until the First World War.
The paper stresses the academic and political conditions under which Karl Marx's ideas were received in a European semiperipheral society and the specific interpretations that were made of those ideas.
It allows for the possibility of undertaking future studies comparing other national cases.

Keywords

History of economic thought, Marxism, heterodox approaches, international transfer of economic ideas