

# 17<sup>th</sup> and 18<sup>th</sup> century Portuguese Nobilities in the European Context: A historiographical overview

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## Abstract

As a result of a genuine explosion in historiographical studies on the subject over the last two decades, the various European nobilities can now be considered to have been studied in some depth. A general tendency to be noted in the above-mentioned works relates to the idea highlighted by various researchers seeking to attenuate the early modernisation of noble values, who have taken the French case, in particular, as their benchmark. It should be stressed immediately that none of the descriptions just quoted can be applied to the kingdom of Portugal, to which almost no reference is made in these texts. On the one hand, the noble groups were constantly increasing in number, which seems to have run contrary to the general trend in eighteenth-century Europe. On the other hand, the high nobility of the Portuguese court did not grow, instead remaining extremely stable and crystallising from the mid-seventeenth century to the end of the eighteenth century, contrary to what was happening in the neighbouring monarchies. Finally, the central core of family values, expressed in the discipline of the aristocratic house, an essential secular aspect of the “ethos” of the *fidalgo* (nobleman), was maintained until the end of the eighteenth century. The extremely closed society of the court of the new Portuguese dynasty of the Braganças only promoted a very limited spread of a cosmopolitan culture within its circles.

## Keywords

Nobility, Aristocracy, Elites, Enlightenment, Family, House, Bragança, Seventeenth Century, Eighteenth Century, Fidalgo, Nobleman

## 1. Some Directions in Recent European Historiography

As a result of a genuine explosion in historiographical studies on the subject over the last two decades, the various European nobilities, both in the modern period and in the contemporary period, can now be considered to have been studied in some depth (see, for the modern period, the syntheses and collections of Meyer 1973, Labatut 1978, Bush 1988, Scott 1995 and Dewald 1996). In view of this increased knowledge, it is now much easier, from a comparative point of view, to establish some of the most prominent specific boundaries of the Portuguese categories of nobility in the modern era. Although, naturally enough, this is not true of all of them.

In the various syntheses on European nobilities to which several Anglo-Saxon historians have dedicated themselves, there frequently appear certain theses that have come to enjoy fairly widespread validity. As far as the central question of the group’s size and structure are concerned, it is useful to stress the idea that “over the early modern period nobles became less numerous and on average richer”, and that “almost everywhere nobles became dramatically scarcer after 1600 (...) in the eighteenth century, at least, contemporaries had no doubt that numbers were declining” (Dewald 1996: XVI and 25), whilst, at the same time, there was a progressive growth in the upper nobiliary categories.

It should also be stressed immediately that none of the descriptions just quoted can be applied to the kingdom of Portugal, which is in fact almost completely devoid of any reference in these texts.

Generally speaking, it can be said that the long-term evolution of Portugal's nobiliary stratification, between the early sixteenth century and the triumph of the liberal revolution in 1832-34, was marked by two simultaneous processes, admittedly pulling in opposite directions: there was a widening of the base of the group (accompanied by a progressive restriction of their general privileges), whilst a court aristocracy was set up, this latter group being restricted and clearly separated from the other nobiliary categories and becoming progressively more crystallised. In other words, these tendencies were directly opposed to the trends that, according to the already mentioned authors, could be noted in most European political units.

Another general tendency to be noted in the above-mentioned works relates to the idea highlighted by various researchers seeking to attenuate the early modernisation of nobiliary values, who have taken the French case, in particular, as their benchmark. This is most true of those authors who, contrary to the popular images of tradition and hereditariness, have detected, even before the Enlightenment, the establishment of an ethical code of "individual merit" linked to the idea of royal service (cf. Dewald 1993, Smith 1996). This change was to be linked to the central cultural role played by the courts, for, "during the seventeenth century, European culture took on an aristocratic and courtly tone it had not previously had", "the development of courts made the display of culture valuable", so that "across Europe, nobles adapted with striking success to psychological and cultural change during the seventeenth and eighteenth centuries (...) their success was clearest in the realm of high culture" (Dewald 1996: 199, 187 and 186). This change naturally had a decisive impact on the patterns of family behaviour. Recently, one of the most prominent French specialists in this area, largely inspired by the already mentioned Anglo-Saxon historians, did not hesitate, in the case of the French nobility of the late seventeenth and eighteenth centuries, to put forward the thesis of "nobiliary individualism", the idea that "the nobility preferred individual achievement to the cult of one's ancestors" (Burguière 2001: 328). Furthermore, it can be stated that, although it was formulated from the study of other problems, the theory of the "unified elite of the Enlightenment" (cf. Richet 1969 and Chaussinand-Nogaret, 1976), defended by various French historians some decades ago, pointed in the same direction.

Now, as was just noted in relation to the previously stated proposition, none of the ideas sustained here would seem to fit unreservedly to the Portuguese case. At first glance, even if we just consider the high court nobility, it does at least seem questionable whether the adoption of the values and cultural practices of the European cosmopolitan high culture was so widespread as to change the group's patterns of behaviour. Most emphatically, it seems impossible to defend the idea that until the late eighteenth century more value was given to individual merit than to the cult of ancestry and the nobility of a particular family. For this very reason, family behaviour was still marked by an immense rigidity until the mid-eighteenth century. And, even then, although it is certain that something was beginning to change, it should be stressed that the changes were restricted almost solely to the decline in the number of entries to the secular and regular clergy.

## 2. Size and Hierarchies of Portuguese Nobilities

The first of the above-mentioned developments, or, in other words, the broadening of the threshold of the nobility, with an ever greater number of individuals achieving this social rank and a consequent devaluation of the respective status, was the result not only of legal and institutional considerations, but also of diversified forms of social logic. The upper social category in fifteenth-century Portugal was the *fidalgia* (nobility), corresponding perhaps to 1% of the population (cf. Marques, 1963-1969). It is clear that those who belonged to the *Braço da Nobreza* (representatives of the nobility in parliament) in the *Cortes* (parliament) were summoned by royal charter (and not elected) and that only those with titles were called to attend, i.e. landlords with jurisdiction over their estates, governor-generals and dignitaries with a letter of council and not the group of noblemen as a whole. Furthermore, it does not seem that the denomination "of the nobility" was commonly used to designate the above-mentioned *Braço* before the sixteenth century. However, the legacy of the fifteenth century continued to be this *fidalgia*, identified with all their descendants recognised in the books of mediaeval lineages, although this rank was already clearly differentiated internally. Over the course of the modern period, the *fidalgo* identity was to be inexorably destroyed in favour of a plurality of classificatory

features, giving rise to a greater and more complex stratification.

The first factor affecting the evolution of the nobility consisted of the manner in which the concept of *civil or political nobility* was adopted in legal literature and in the everyday practice of institutions (in contrast to natural nobility) (cf. Monteiro 1987, 15-51), arising, it would seem, from the singular and somewhat belated manner in which Portuguese jurists integrated the category of “nobility” from European common law (cf. Hespanha 1993: 27-42). António Rodrigues, D. Manuel’s King of Arms, refers expressly to this category of the civil or political nobility, explaining that this status could be acquired in “two ways, either by giving someone an office of such a kind that it brings dignity with it or by words that state how the prince considers the person to be reputable” (Rodrigues 1931:43). Already in the first half of the seventeenth century, one of the greatest Portuguese jurists of his time stated that “*fidalgos* is the word, and more general title, by which we refer to the nobility”, but he then added that “there are, however, other people of greater, equal and lesser status, who enjoy greater and equal privileges (...) [paying heed] only to the dignity, position or occupation in which they are involved” (Ribeiro 1730: 122, 141-142). The adoption of this concept could not avoid coming up against certain restrictions, but gradually it was to become established in the practice of many institutions in a process that reached its peak at the end of the eighteenth century, not only contributing to the distinction between the nobility and the *fidalgua* (a more restricted concept), but also leading to the effective “banalisation” of the frontiers of the Portuguese nobility, which became the most blurred in Europe.

This broadening of the threshold of the nobility, established by the legislation of the monarchy, was also effectively adopted by the social actors. From the end of the sixteenth century, the *homens-bons* (‘good men’) who governed the municipalities, for example, became entitled as “the local nobility” (Coelho and Magalhães 1986: 43), although they did, however, elect others to act as their representatives in the *Braço do Povo* in parliament. As part of a process of group mobility, the wholesale traders were expressly ennobled by the legislation introduced by the Marquês de Pombal (1770). At the end of the Old Regime, nobility was recognised as a tacit condition that was acquired by “living nobly” or “through the law of nobility” by performing ennobling functions (such as belonging to the group of high-ranking army officers or orderly officers, the magistracy, or simply to a municipal council, etc.) or, in a negative sense, by not performing mechanical tasks.

The previously described category was effectively to be found expressed in many different institutional practices in the seventeenth and eighteenth centuries. One of these was to gain access to the habits of a knight of the military orders of Avis, Christ or St. James (cf. Olival 1988, Olival 2001, Pedreira 1992 and Pedreira 1996), the profusion of whose members were frequently referred to with some irony over the centuries. The Order of Malta, on the contrary, escaped such a situation, for in this order what was required was to be a member of the “*fidalgua de linhagem e armas*” (*fidalgua* of lineage and arms) and not just of the simple nobility (cf. Versos 1997).

It should be added that the “broadening of the nobility” was further favoured by other circumstances. One of these was the way in which access to the royal charters granting coats of arms was processed (Cf. Franco 1989). There was also the fact that, under Portuguese law, simple nobility and *fidalgua* were transmitted by both the male and female side of the family, as well as there being no control over the use of surnames, both of which situations were predisposed to an expansion of the nobility. Even the registers that afforded access to the different categories of *fidalgos* in the royal household showed a considerable openness in the final phase of the Old Regime, and the point was reached whereby the status was attributed to anyone who contributed to public loans.

Overall, the dimensions mentioned earlier in a very summary form conferred a clear singularity on the Portuguese hierarchy of nobles, which may now be briefly described in the final phase of the Old Regime. At the base was a vast and imprecise category of “simple nobility” and the knights who wore habits, which included all those who had licentiatehips and bachelor’s degrees, high-ranking army officers, militias and orderlies, wholesale traders, judges and councillors from an indeterminate number of towns and cities, and a large section of the restricted group of public servants. In short, all those who “lived nobly”. They enjoyed a fluid status, only invoked for certain effects and perhaps covering between 6% and 8% of male adults, and for which reason considered themselves to be socially disqualified, leading to a huge demand for other distinctions, namely for the habits of the knights of the military orders (for which proof of nobility was required, but not of *fidalgua*). Above this was an

intermediate category of several thousand *fidalgos*, comprising a majority of “*fidalgos* with coats of arms” and “*fidalgos* with lineage” (whose ancestors had received the royal charter granting the coat of arms that was displayed on the front of their houses), with a very unequal geographical distribution, as well as several hundred *fidalgos* from the royal household and high-court judges. Finally, there was the “prime nobility of the realm”, almost all of whom were resident at the court, consisting of roughly a hundred and fifty lords, commanders and holders of positions at the palace, at the apex of which category were to be found the fifty or so houses of the *grandees* (titles of count, marquis and duke) of the realm.

In fact, the other aspect of the equation in which the Portuguese case seems to contradict the European tendency is in the shrinking and later redefinition of the top of the nobiliary pyramid. Several factors contributed quite closely to this outcome, but the decisive event was the definitive establishment of the court of the new Bragança dynasty in Lisbon after 1640. At the end of the seventeenth century, in general, when one speaks of the *fidalgua* as a group, one first of all refers to the high court nobility, which to a large extent was already confused with the group of titled persons (just as in the Spanish monarchy; cf. Dominguez Ortiz 1973: 73, Dominguez Ortiz 1976: 349, Atienza 1987: 1-70). The fundamental moment in the definitive formation of the titled elite in the modern age was to be found in the last decades of the dual monarchy (1580-1640), when Portugal was ruled by Spanish Habsburg kings, during which period roughly forty titled houses were created. The total number of houses reached at that time, increasing from roughly twenty to more than fifty, remained practically stable until the last decade of the eighteenth century, even though roughly 40% of the Portuguese noble houses disappeared with the Restoration of Portuguese independence. In fact, these were quickly replaced, and the frequency of the annual granting of titles reached at that time was only (and greatly) exceeded during the regency of D. João (1792-1816) and his subsequent reign as king. The remarkable stability achieved over a period of roughly a hundred and thirty years after the end of the War of Restoration (1668) finds no parallel in any other period in Portuguese history, and rarely has it been equalled by other European aristocracies. For more than a century, very few noble houses were created or suppressed. The following table therefore suggests to us a very clear chronology: in the somewhat agitated decades of the reign of Filipe IV and the War of Restoration, the extended group of *grandees* was formed (for until 1790 almost all the titles conferred the status of *grandee*), followed by a long period of stability. It should also be added that the central core of this group remained extremely stable. At the peak of its crystallisation, in 1750, of the 50 titled houses existing in Portugal, 34 had been ennobled more than 100 years before and 7 dated from as far back as the fifteenth century.

TABLE No. 1  
Titular houses existing in Portugal (1385-1832)

Time periods	Houses created	Annual average	Houses suppressed or united	Annual average	Total number (at the end of the period)
Before 1390	1				1
1391-1430	4	0,1	0	0,0	5
1431-1460	5	0,2	1	0,0	9
1461-1490	10	0,3	5	0,2	14
1491-1520	5	0,2	3	0,1	16
1521-1550	6	0,2	2	0,1	20
1551-1580	2	0,1	3	0,1	19
1581-1610	13	0,4	2	0,1	30
1611-1640	28	0,9	2	0,1	56
1641-1670	18	0,6	24	0,8	50
1671-1700	8	0,3	7	0,2	51
1701-1730	5	0,2	5	0,2	51
1731-1760	7	0,2	10	0,3	48
1761-1790	8	0,3	2	0,1	54
1791-1820	63	2,1	14	0,5	103
1821-1832	38	3,2	14	1,2	127

In part, these indicators stand in contrast with those known for the other monarchies closest to Portugal. In Spain, titles rose from 144 in 1621 to 528 in 1700 and then to 654 in 1787, passing the one thousand mark in 1800; the growth in the number of grandees was even greater, rising from only 41 in 1627 to 119 in 1787. The English peers, in their turn, rose from 55 in 1603 to 173 in 1700, reaching a figure of 267 in 1800. In Naples, titles rose from 165 in 1599 to 446 in 1672 and 649 in 1750. Generally speaking, the major growth took place mainly in the seventeenth century, just as it did in Portugal; yet, in none of the cases mentioned does one note the crystallisation, closing of ranks and stability that was noted amongst the Portuguese titled nobility between 1668 and 1790 (based on Dewald 1996: 27, Dominguez Ortiz 1973: 73, Dominguez Ortiz 1976: 349, Atienza 1987: 1-70; Cannon 1984: 15).

This process corresponded to a concentration of the royal graces and favours and important offices in the hands of the high court nobility. In fact, the best indicator that can express the evolution duly noted is provided to us by the commanderies. In the early seventeenth century, the commanders of the military orders amounted to a quite numerous social category, numbering more than four hundred individuals and houses, even though the few commanders with titles to nobility (counts, marquises and dukes) already accounted for a sizeable part of the aggregate income of the commanderies that were administrated by them. A century and a half later (1755), the number of commanders was reduced to well below a half of this number, and 50 titled houses accounted for roughly two-thirds of the overall income. Up to the final triumph of the liberal revolution (1832-34), the number of commanders only increased slightly, but the commanders entitled to nobility then represented more than half of the total number and now received more than four-fifths of the income (cf. Monteiro 1998). The distribution of the income of the commanderies therefore provides us with an impressive picture of the evolution of the top of the nobiliary pyramid: from the beginning of the seventeenth century onwards, the size of the group declined in quite spectacular fashion, with the longstanding titled houses (almost all of them in the hands of grandees) absorbing most of this income.

This unusual result derives from a combination of two types of factors. On the one hand, the Crown made a significant contribution towards the stabilisation of the titled elite, not only restricting the new concessions of titles, but also accepting the rules of succession that were being imposed. The consolidation of the Bragança dynasty therefore largely serves to explain the stabilisation of the group and the almost complete absence of any new admissions to the nobility for more than a century. But this is not in itself a sufficient explanation for everything. In particular, it does not explain the small number of houses that were either suppressed or united until the start of the new boom in the awarding of titles in the 1790s. In fact, within the limits set by the monarchy, the reproduction of the titled elite depended on strategies that were actively developed by the houses composing this elite. More precisely, it depended on the strict discipline of the behaviour followed within the house, which will be discussed in the following section.

### **3. Models of Family Behaviour and Value Systems**

The recent evolution in social sciences, in general, and social history, in particular, has resulted in a growing distrust about the reified use of traditional categories of historical analysis and rigid models of behaviour. Even for those who distance themselves from the post-modern defence of the “dissolution of the social bounds”, the alternatives almost always involve paying renewed heed to the language of documents and even giving special attention to individuals, their experiences and the ways in which they form their social identities. In this way, we can understand the peculiar difficulties that arise when attempting, somewhat against the trends that have become re-established in European historiography, to accentuate the rigidity of a model and the amazing regularity with which the actors involved therein reproduced the clearly asymmetrical social roles that were their destiny by birth, as in the case under analysis.

A very general observation must be made about what has been stated above. Unlike unilineal notions of change and evolution, the case studied here does not show any passage from group solidarities to the individualisation of behaviour and destiny. On the contrary, in the fifteenth and

sixteenth centuries, the individualisation of behaviour in the upper categories of Portuguese society was much more accentuated than in the two subsequent centuries. On the one hand, the destinies of individuals were far less conditioned by the status attributed to them at birth. And, on the other hand, the constraints of kinship groups proved to be much less rigid. The strengthening of the discipline of the aristocratic house, with the prior imposition of the status that was to be enjoyed by each member of the family, both preceded and closely accompanied the crystallisation of the courtly aristocracy as a closed and almost inaccessible social category from the mid-seventeenth century onwards. Only at the end of the eighteenth century was this rigidity of “family” behaviour to be disturbed in any way, anticipating, albeit briefly, the first signs of a more open access to the top of the nobiliary hierarchy. In short, the case studied here does not seem to fit the picture initially painted by recent European historiography.

Despite everything, there was a common heritage, not between all the Portuguese nobiliary groups, but among those who regarded themselves indisputably as *fidalgos*. This heritage was one expressed as a set of shared values in which the notion of what constituted an aristocratic house and specific ways of ensuring its transmission played an essential role. After reaching a certain level of nobility, the custom was to adopt what can be called the reproductive model of entailment, or, in other words, from the mid-sixteenth century onwards, the institution of an aristocratic house and the birth of a first-born son represented the goal of the processes of upward social mobility. It was not just a way of amortising and passing on an estate, but also a model of family organisation, characterised by the rigidity and vitality of the underlying values and a complementarity between civil service and ecclesiastical careers.

Although the vast amount of available information is very fragmentary and systematic monographic studies are almost completely lacking, it is possible to suggest some general features of what can be termed the reproductive model of entailment, taking as a paradigm or ideal type the behavioural patterns at the top of the nobiliary pyramid, or, in other words, of the Portuguese *grandees* of the seventeenth and eighteenth centuries, who in this period clearly distanced themselves from the remainder of the *fidalgia*, including the most important provincial nobility. I shall concern myself with them first of all, so that, afterwards, I can attempt to identify at what levels of the social space this model tended to be adopted. This is necessitated by the fact that the acceptance of this model and its underlying values did not take place from one day to the next (it did not even coincide chronologically with the beginning of the spread of the institution of entailment), nor did it affect all the social elites in the same way. Finally, I shall highlight how, in the second half of the eighteenth century, the model began to be called into question, on this occasion with a not inconsiderable intervention on the part of the monarchy.

The genealogy of the Portuguese institution of entailment has been the subject of an extremely vast legal literature. Briefly, we can say that it directly reproduced the model of succession adopted by the monarchy and had been closely inspired by the Spanish, or more precisely, the Castilian law of entailment. In fact, the Portuguese law of entailment was the one that most closely resembled the Castilian law. Although linked to a remote feudal inheritance, paradigmatically illustrated by the famous words of St. Bernard, the Castilian system of primogeniture displayed to some extent a certain resistance to the general trend. It represented a reaffirmation of its principles in a doctrinaire climate in which the reception of Roman Law, the European *jus commune*, tended to favour the sharing of an estate between heirs. In most European countries, from the sixteenth century onwards, the trend was towards a weakening of the doctrine of entailments and primogeniture (cf. Clavero 1989a), which either continued in a somewhat mitigated form or else gave rise to less restrictive solutions (such as the notion of strict settlement in England), at least at the level of the law (cf. Cooper 1976). On the contrary, supported by a wealth of treatises written on the subject, the law of entailment in the Iberian Peninsula was perpetuated as the extreme legal form of nobiliary primogeniture, recognised as such in the legal literature of the period. Bartolomé Clavero wrote on this subject that “the Castilian primogeniture was to be (...) the European model of a nobiliary anthropology” (Clavero 1989b: 588). The law of entailment thus represented a mechanism of exclusion for privileged groups in a context where the rule of sharing between brothers, arising from Roman Law, tended to impose itself as a general norm. As a belated legal construction, going against the various European trends and a characteristically Iberian concept, the *morgadio* system was based on the principles of perpetuity,

indivisibility and primogeniture. Masculinity and the right of representation can be considered very general characteristics, but the fact of the matter is that the specific form of succession was defined by the institutor. In the Portuguese case, until the legislation introduced by the Marquês de Pombal in 1769-70, which imposed the Castilian model of regular *morgados* (the first-born son being the heir to an entailed estate) as the sole model, there was in fact a wide diversity of rules of succession. However, it is important to underline that entailments based on primogeniture and masculinity were always the most common form of succession.

If we move from the legal history to the social history of the institution, the chronology becomes very diversified. Although the first Portuguese *morgados* had been instituted by the Portuguese *fidalgo* population as early as the Low Middle Ages (cf. Rosa 1995), the fact is that it was not until the sixteenth century and the early seventeenth century that most of the entailments of the various branches of Portuguese noble lineages were founded. Very general aspects of this spread of the model of entailment are: the central notion of the house (1); the extremely strict family discipline that was imposed on all legitimate and illegitimate filiation and which tended to be exercised by the “pater familias” (2); the complementarity between this model and the availability of ecclesiastical careers that were indispensable for its application (3); and, finally, its adoption not only as a model of inheritance, but also as a vocabulary that codified the “natural” status of each member within the house (4). The extraordinary banality that this vocabulary has acquired in everyday language is an aspect that should also be stressed.

In the sixteenth and seventeenth centuries, the Portuguese crown encouraged the spread of this model in different forms amongst the main aristocracy of the kingdom in various ways: first of all, allowing for the foundation of *morgados* almost without restriction; next, allowing for the annexation of the crown's assets by *morgados* and bringing succession in these forms of nobility closer to the rules applied under the monarchy in all cases (1641); finally (and this is a decisive aspect), because what mattered most of all, both in the appointment of people to major offices and in the remuneration of great services, was the house and not the individual, and this conception of things still prevailed in the second half of the eighteenth century: “let the honours and graces bestowed in the satisfaction of great services performed in the battle field be continued in those houses into which they enter in order to preserve the memory of those who deserve them and to stimulate imitation”.

The great aristocratic houses underwent major changes throughout the seventeenth century: from being highly territorialised institutions, from the point of view of power, property and clientele, they changed into houses belonging to the court nobility with property scattered all over the country, but with an increasingly limited administrative and jurisdictional presence. This great change accompanied the implantation of the new Bragança dynasty in 1640. There was also a significant change in the nobiliary hierarchy. A “high court nobility” was established, consisting of titled nobles and other holders of positions at the royal palace. The end of the war and the consolidation of the dynasty (1668) led to an extreme stability in the composition of the nobility. This fundamental change was to be reflected in the behaviour of the aristocratic elite. The titles and other distinctions awarded by the dynasty of Bragança were few in number and signalled unquestionable social prominence. In fact, these titles seem to have been capable of providing a sufficiently strong identity to the lords of the houses that held them, so that they would be in a position to accept the possibility of their disappearing or being taken over by other titled houses. The code of entailment, which had long since been incorporated, was to take on new and more restrictive forms in this new context. Or, in other words, these changes did not affect the internal discipline of the aristocratic houses.

The fundamental unit for the study of aristocratic behaviour in the period under analysis is therefore the house, understood as being a coherent set of symbolic and material assets whose extended reproduction was the responsibility of all those born therein or dependent thereon. In the historical period to which we are referring, the house represented a fundamental value for (almost) all social elites. The family, in the sense of a noble lineage of remote origin, embodied in the surname (and/or male line), was only one element in the identity of each house. As has been said, although the nobiliary house generally had a territorial reference in its origin, bestowed by the *morgado*, seignior, or even commanderies, and although attempts were made to perpetuate this territorial reference in the titles, the fact remains that this element only existed as a remote allusion and its possession could even disappear without the title being changed.

One of the most decisive implications of the already mentioned notion of a house was the destiny given to the children. The dominant concepts were still perfectly clear. The “status” that was chosen for the heirs, daughters and second sons was seen as a function of the house into which they had been born. Those that were destined for marriage, beginning with the heirs presumptive, obeyed the logic of the policy of the house’s alliances, based on various criteria. The others, in their turn, were expected, when unmarried, to seek to ennoble the house that had given them their existence.

The fate of unmarried daughters had long been the life of a convent. As the agitated navigations to the East began to have increasingly uncertain results, an ecclesiastical career also began to be seen as the normal destiny for second-born sons, who were channelled into this activity in childhood and then attended the two royal colleges in Coimbra (São Pedro and São Paulo), where, since the mid-seventeenth century, most of the portionists had been the second-born sons of grandees and all of them had been descendants of the prime nobility of the realm.

The clergy, particularly when they had risen to high positions and performed important services for the monarchy (bishops and cardinals), were expected to bestow upon the houses of their brothers or nephews, if not all their «free assets», at least those services (after all, their most valuable capital), so that they could increase their royal endowments in the form of pensions and benefices; and this was, in fact, how the majority behaved. Many houses were elevated by this means and thus enjoyed greater income and distinctions. Furthermore, the houses did not only capitalise on the services of their second-born sons and the respective remuneration. They also sought to capture, by all means at their disposal, the prestige that went with these positions.

The aristocratic houses also owed their daughters and second-born sons alimony or, alternatively, either the dowry that was necessary for them to be able to marry or the endowment required for them to enter into a religious institution. One of the distinguishing marks of the period under analysis was in fact the stabilisation of the amount of aristocratic dowries, which resulted in a fall in the respective amount to much lower values.

A detailed analysis of the practices of succession adopted by the aristocratic elite of the dynasty of Bragança between 1600 and 1830 shows that the total number of titled houses reached in 1640 remained practically unchanged until the last decade of the eighteenth century, although there was a significant period of renewal between 1640 and 1668, with slightly less than half of them disappearing after the Restoration and being replaced by others. The remarkable stability achieved in the roughly one hundred and thirty years after the end of the War of Restoration (1668) was rarely matched by other European aristocracies. It should be stressed that between 1670 and 1832 no titled house disappeared, or was kept away from the life of the court, as a result of the economic decline of the holders of the respective titles. Nor was any house suppressed as a result of having only a direct legitimate female heir. Whenever there was direct succession, male or female, the titles were always renewed. Furthermore, between 1600 and 1830, an average of 70% of the houses enjoyed direct male succession, although this number showed a certain tendency to fall. The results are undoubtedly uncommonly high, going against what is normally believed to be the trend. There were many houses that, over more than two hundred years, always managed to enjoy male succession. However, even when this didn’t happen, the capacity for survival was quite remarkable: more than half of the houses studied managed to last as they were for more than two hundred years. And it should be pointed out that, in several cases, they were suppressed for political reasons (high treason) and not because of a lack of biological heirs.

Such an unusual stability resulted from a combination of two types of factors: the options taken by the crown in regard to this matter, namely by facilitating succession to the crown’s titles and estates (exemptions from the “mental law”); and the strategies pursued by the aristocratic houses in an attempt to ensure their perpetuation and enlargement. We shall concern ourselves with these questions now.

First of all, one should consider the demographic factors. Practically all male and female heirs (on average, always more than 92%) entered into marriage. Only with very rare exceptions, those who failed to marry did not do so because they died while still very young. Although there was a tendency for the figure to increase, the percentage of titled nobles without surviving heirs ranged between a minimum of 13% and a maximum of 26.1%. Furthermore, the percentage of those who had male heirs was always higher than 61%, and in the more distant period (1600-1650) this figure amounted to more than 80%. The titled nobles with surviving descendants had on average between 4.2 and 5 children to



find places for, although the trend was for their number to decrease slowly. This remarkable result basically arose from three immediate factors: an extremely young average age for women to first get married (rising from a minimum age of 17.5 in the seventeenth century to a maximum of 21.7 at the beginning of the nineteenth century); the complete absence of any contraceptive practices; and the absence of maternal breast-feeding, a task that was almost always entrusted to wet nurses.

However, whenever there was no succession, other factors in the aristocratic model of reproduction may have affected the desired continuity of the houses. This was most immediately the fate of the non-inheriting sons and daughters. Until the dramatic decline in the number of entries into ecclesiastical orders in Portugal, just as in other European Catholic countries in the second half of the eighteenth century, somewhere between a third and more than half of the aristocratic daughters remained unmarried. And, until 1760, more than two-thirds, and at certain periods more than four-fifths of the non-inheriting sons did not marry.

It should also be added that inbreeding was a fundamental part of the group's reproductive model. Until the end of the eighteenth century, in more than 95% of cases, both the heirs and the daughters married within the high court nobility, most of whom had titled estates. This option was fundamental for preserving the group's social identity, thus helping to guarantee the monopoly of the main offices of the monarchy and the respective remuneration in the form of royal endowments. Furthermore, it was this logic that led to the preference for sending the second-born sons and some of the daughters into religious orders rather than marrying them "beneath their station", quite possibly without a dowry and without any major expenses. But the above-mentioned social homogamy had a potentially negative effect: it increased the risks of some houses being taken over by others.

To offset these risks, aristocratic houses adopted a set of perfectly standardised and widely divulged behavioural patterns. First of all, when the lord of the house had no descendants or no prospects of having any in the future, attempts were made to rapidly marry off his immediate successor. Sometimes, this was only known when they were already advanced in age. It was quite frequent to hear stories of clergymen who renounced their vows in order to marry in the sometimes desperate attempt to produce descendants for the house of their brothers. Secondly, in those cases where the succession fell upon women, almost without exception they would marry a second son. This was preferably an uncle, in order to maintain the male line with the surname of the house. Even when there was no uncle available and marriage had to be sought after in another lineage and house, the rule was to maintain the surname, although there were several exceptions. In any case, to almost all intensive purposes and effects, the husbands of female heirs were adopted by the houses that "received" them. In particular, their economic status (alimony, etc.) was absolutely identical to that of most married women in the aristocracy. Finally, whenever there was presumed to be a potential risk of a union between houses, it was established in the marriage and dowry settlements how the separation would be effected in the following generation. These clauses were almost never respected but, in any case, they reveal the aim of preserving the individual identity of each house.

The discussion of the above-mentioned point, namely the idea of the fundamental importance of the reproductive model of entailment as standard behaviour for the group of social elites, most perfectly illustrated by the study of the *grandees*, is inexorably faced with the limitations of the data that have so far been discovered and studied. We know much more about the *grandees*/high court nobility than we do about provincial nobilities, and we know much more about the eighteenth century than we do about previous periods. The considerations made in the following paragraphs are therefore based on scattered and fragmentary information. The question that needs to be asked is clear: what was the chronology and, above all, what were the contexts in which this model tended to be adopted?

As far as the chronology is concerned, it has already been clearly stated that it was above all during the sixteenth century that the model of entailment became widespread amongst the main lineages of the realm. The same thing seems to have happened with the main provincial elites. The case of Oporto is certainly paradigmatic. Most of the families that made up the municipal elite of Oporto, until then given over to mercantile practices, only gained access to the nobility and *fidalgia* during the sixteenth century: "we are left with the impression of a radical evolution of these families (...) during the sixteenth century. Having begun the century involved in the commerce of the city of Oporto, without any great concern for the creation of "houses", which allowed second sons to become involved in business on an equal footing with first-born sons (...). As the century advanced, *morgados*, which were

set up at the expense of the prospects of the second sons, became widespread. All that was left for these sons was India or religion, and, for the daughters, all told, just religion” (Brito 1997: 302).

The second question is that of knowing what were the social trajectories within the framework of which the reproductive model of entailment tended to be adopted. In fact, particularly in the processes of upward social mobility, there were always alternative models. One of them was the investment made in the daughters. This is the direction suggested by the known indicators for the lower levels of the *fidalgia* in the sixteenth century (cf. Boone 1986), as well as in other social categories, at least in the first generation after having achieved a higher social status. A recent study on the client networks of the house of Bragança between 1560 and 1640 clearly suggests that upwardly mobile family groups preferred to invest in their daughters (cf. Cunha 2000: 498-546), providing them with dowries for their marriage, unlike the upper categories of the servants of the royal house (*fidalgos*), who adopted the model that we have been discussing. A similar model to the former one was also adopted by the elites of São Paulo in colonial Brazil in the seventeenth and eighteenth centuries (cf. Metcalf 1995), in what was an area of heavy migration. As it happens, in the studies of the upper echelons of the Portuguese rural world of the eighteenth and even the nineteenth centuries, not only were great differences detected between the areas and groups that followed a model of equal sharing of inheritances and others where the inheritance was organised on the basis of preserving the house, but also in some of these latter cases (in certain areas of the Minho) it was in fact the daughters who received most privileges (cf. the synthesis by Durães 1995).

It should be added that we know little about the reproductive models of magistrates and bureaucrats and that, in the second half of the eighteenth century, only the top of the pyramid of Lisbon merchants (a large number of whom, as it happens, originated from neighbouring areas in the Minho) adopted strategies of systematic entailment of property (cf. Pedreira 1995: 269-293). Although the restrictions imposed by the Marquês de Pombal may have had some influence, the fact remains that towards the end of the Old Regime the overwhelming majority of Lisbon traders did not set up entails, but only the small group of the richest. Was this a symptom of the gradual erosion of the model?

In fact, the importance of the limitations imposed on the foundation of *morgados*, or entailed estates, by the legislation of the Marquês de Pombal (1769-70) must not be overlooked. In short, it began to be required that their founders should be “*fidalgos*, or persons of distinguished nobility”, that the estate to be entailed should reach certain levels of income, varying from some provinces to others, and finally that the central court (*Mesa do Desembargo do Paço* – the Supreme Royal Court) should be consulted upon the matter. Furthermore, besides the fact that the institution was generally condemned and was only preserved because it was considered a condition for the survival of the nobility within a monarchy, small entails were also being suppressed (cf. Serrão 1987: 111).

Although there is no lack of systematic studies upon the matter, it seems undeniable that the legislation introduced by the Marquês de Pombal did away with many *morgados* with low levels of income and placed serious restrictions on their foundation by groups that did not reach reasonably high levels of wealth and nobiliary status. The spread of entailed estates in the provinces, still very frequent in the first three quarters of the eighteenth century, began to be subject to serious restrictions. However, from the North (Minho) to the extreme South (Algarve) of Portugal, even passing occasionally through colonial Brazil (cf. Silva 1990), the most successful provincial elites did not cease to make use of the institution. Generally, this option was materialised at the end of one or two generations, with the voluntary contributions of brothers or uncles frequently being a decisive factor, particularly when they had risen to the level of a good ecclesiastical benefice. And the crisis in the number of people entering the clergy, which could be perfectly easily identified in Lisbon from the 1760s onwards, as we have already said, seems to have been slower to spread to the provinces, although it was still a little known reality.

In any case, the reproductive model of entailment should not be confused with the foundation of *morgados*. This model, the true stereotype of the elites of the Portuguese Old Regime, always implied high rates of celibacy and ecclesiastical careers amongst second-born sons and meant that ever greater value was attached to the idea of the house, although it did not require the foundation of entailed estates. As far as the forms of inheritance were concerned, emphyteusis produced analogous effects. In fact, many houses of *fidalgos*, such as those of the well-to-do farmers of the North of Portugal, were based on emphyteutic estates and not just on entailed estates (cf. Macedo 1996: 102-130). The codes

and the systems of reference which we have been discussing were able to operate in different institutional contexts and with some autonomy in relation to the legal framework of inheritance. For all purposes and effects, it was the standard pattern of aristocratic behaviour and represented as such at the time.

In the provinces, therefore, it is quite likely that individual destinies did not follow that incredible regularity and predictability that we saw in the case of the high court nobility. However, it can still be said that until the beginning of the nineteenth century the reproductive model of entailment was perpetuated as the standard model for the group of social elites as a whole. This was not only because it fitted in with the perpetuation of estates which was indispensable for the preservation of income levels that were compatible with the satisfactory sustaining of elites, but also for the greater symbolic value that was attributed to the imitation of aristocratic behavioural patterns.

#### 4. The Paradigm of “Nobility Modernisation” and its Limits

For the prime nobility of the realm, the first signs of the crisis in the model of traditional behaviour were to be found in the dwindling number of entries into the clergy, on the part of both men and women, which began to be noted from the 1850s onwards (cf. Monteiro 1998: 165-196). This change, which was not related to any early spread of contraception (not in fact practised) and had dramatic effects on the social composition of the episcopacy (cf. Olival and Monteiro 2003: 1233-1238), would not be matched by an increase in the marriages of younger non-inheriting sons and daughters until at least a generation later. Or, in other words, it did not immediately result in an individualisation of behaviour. Various studies have made it possible to widen the crisis in the number of entries into the clergy to include other groups (cf. Araújo 1997: 122 and ff., Sousa and Gomes 1998, 101-125).

In any case, there is no doubt that there was a crisis amongst the elites in terms of the social importance attached to the pursuit of ecclesiastical careers in the second half of the eighteenth century. The explanations for this are not obvious. Most immediately, this is because although there are some studies that highlight the spread amongst the Portuguese aristocratic elites of certain aspects of eighteenth-century European culture (in the fields of literature, science and the arts (cf., amongst others, Delaforce 2002, Araújo 2003)), the limits that were imposed upon these aspects seem indisputable. Contemporary witnesses from the mid-eighteenth century testify to the surprise felt, on encountering “our barbaric customs”, by those arriving from outside, such as the young third Count of Assumar, who had recently returned from France. And his comments were not restricted to noting the parsimony and insipidness of life at the Portuguese court, a subject that is very frequently referred to in eighteenth-century sources. In fact, his comments were explicitly extended to include the “family” behaviour of the Portuguese aristocracy. He stated that he was “their supreme friend and to all my brothers I wish the greatest possible happiness and I find the general custom of giving so much preference to first-born sons in the inheritance of the estates of the Houses unfair, particularly in Portugal where the greatest portion is that of substitution,” and, later, addressing his father on the subject of maternal inheritance, he insisted that “I have never been of the opinion that the eldest son, besides being always the most privileged one, should have beyond this everything that was possessed by his parents and that the others who were no less your children should remain forever dependent and be obliged to work themselves to death just to be able to live” (Monteiro 2000b).

As another essential aspect, attention should also be drawn to the characteristics of the educational patterns afforded to the high court nobility of the dynasty of Bragança. The education of the first-born sons of the houses did not undergo any drastic evolution during this period, despite the creation by the Marquês de Pombal of the College of Nobles in 1759, which the majority did not attend. The essential pattern was continued: an education administered at home, followed by entry into the military institution at an early age, in most cases. This happened at a time when, in the main monarchies of Enlightened Europe, the majority of the heirs of the respective prime nobilities were increasingly subject to the socialisation of colleges, military schools or academies. And, in the particular case of England, they predominantly began to attend university, a practice that was reserved in Portugal only for second-born sons, who, because in principle they were destined for ecclesiastical careers, were

generally sent to royal colleges and the University of Coimbra (cf. Monteiro 1998: 519-522).

What is known about aristocratic libraries clearly suggests that access to, and the spread of, the culture of the Enlightenment was more the exception than the rule. In short, there are no really evident signs of any cultural “modernisation” in the aristocratic circles of the court. The parallel, for example, with the much discussed French case only tends to highlight the differences. And yet, however, one of the indicators of change already begins to be quite clearly noted in the second half of the eighteenth century.

Without wishing to exhaust the possible explanations for such a complex phenomenon, it seems fundamental to insist on the possibly unforeseen effects of the interventions of the monarchy, especially in the period of the government of the Marquês de Pombal (1750-1777). Amongst other measures that were put forward at that time, stress should be laid on the recognition of the crisis in the monastic life and the restrictions placed by Pombal on people entering the ecclesiastical career, the defence of marriage to be found in some legislation of this period and the legislation on *morgados* which made their institution much more difficult and dependent on the permission of the central court. Finally, there is no denying that, despite the limits on its spread pointed out earlier, the “culture of the Enlightenment” certainly contributed to the first and almost only indicator of change in the patterns of behaviour of *fidalgos*, or, in other words, the fall in the number of entries into ecclesiastical life. This does not mean that we are saying that there was a secularisation of the dominant values in the aristocracy (something that it would be difficult to demonstrate), rather we are suggesting that there was an indirect effect of the “culture of the Enlightenment”, brought about by the impact of the changes introduced by the Marquês de Pombal, which took away some of the appeal of ecclesiastical careers amongst the more enlightened elites of the time.

Furthermore, we are well aware that the phenomenon that we have just mentioned also occurred in other European Catholic countries, such as Italy and France (cf. Litchfield 1969, Zanetti 1972, Forster 1971, Cooper 1976) (we know less about Spain), although the concept of de-Christianisation used in France seems somewhat inadequate for dealing with this phenomenon. In conclusion, it can be said that until the end of the eighteenth century the only indicator of change in respect of one essential aspect of the social identity of the *fidalgo* groups, or, in other words, the discipline of the house, was related to the crisis in the number of entries into ecclesiastical life, which began amongst the high court nobility, but gradually spread to the provinces. In 1786, the richest and most well related *fidalgo* in Funchal had no problems in asserting that he did not “intend to coerce any of his daughters into accepting the status of a nun”, although this was a normal destiny in his and previous generations for daughters born into the house of which he was the administrator.

In conclusion, it can be said that the Portuguese case, which we have dealt with here only in respect of some of its multiple components, does not seem entirely to corroborate the images recently provided of the evolution of noble houses in the seventeenth and eighteenth centuries. On the one hand, the nobiliary groups were constantly increasing in number, which seems to have run contrary to the general trend in eighteenth-century Europe. On the other hand, the high nobility of the Portuguese court did not grow, instead remaining extremely stable and crystallising from the mid-seventeenth century to the end of the eighteenth century, contrary to what was happening in the neighbouring monarchies. Finally the central core of family values, expressed in the discipline of the aristocratic house, an essential secular aspect of the *fidalgo* “ethos”, was maintained until the end of the eighteenth century. This last aspect cannot be dissociated from the spread of culture or the forms used for the construction of nobiliary identities in Portugal in the period of the dynasty of Bragança, which began with the rebellion of 1640. Contrary to the well-known models based on Norbert Elias and the French case, but which has been questioned by the historiography (cf. especially Duindam 1995, Adamson 1999), the extremely closed society of the court of the new Portuguese dynasty only promoted the spread of a cosmopolitan culture within its circles in a very limited fashion. Even in this select and restricted universe, it was the traditional standards of family behaviour, linked to the institution of entailed estates, which continued to prevail. And this is the meaning that must be given to the words of various critical observers coming from the outside, who said of the Portuguese society of the early eighteenth century that “in our land, there was no magnificence, no court and no great Lords”, which arose “from the short upbringing given to children, who were reared in poverty and narrow-mindedness, more through ignorance and erroneous economy than through necessity” (Brochado 1909:

5).

Finally, the case studied here raises a problem that is recurrently mentioned in studies of comparative history. To what extent is it legitimate to use as a term of comparison the political and cultural centres of seventeenth and eighteenth-century Europe (namely France and England)? Or can it be that some of the aspects that have been suggested by the authors mentioned initially to be widespread throughout the old continent are more of an exception than a rule?

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