

The Portuguese discover, others invade – Evaluating historical events in History textbooks in Portugal

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1. Research questions



History textbooks in Portugal

How are historical events* evaluated?

Does the evaluation of events differ, depending on the nations involved?

How is the evaluation linguistically expressed?

*Historical events in focus: when a nation transposes its geopolitical borders and enters the geopolitical borders of other nation(s).



2. Points of departure

Portuguese History in school textbooks

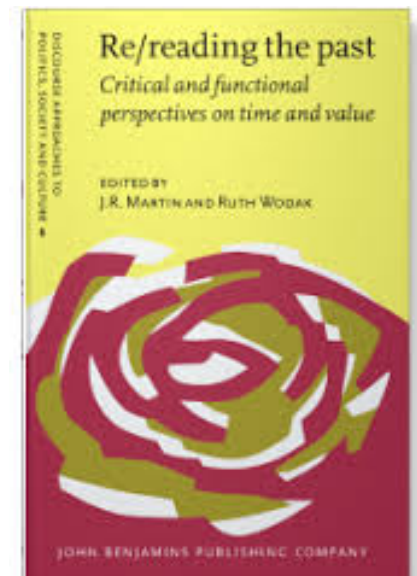
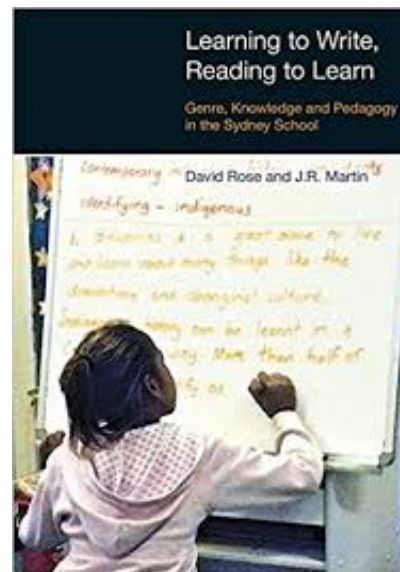
1. Being Eurocentric in nature, the narrative on national identity is not multicultural (Araújo & Maeso 2013, Araújo 2017)

“in the long run, it was Europe that made the modern world”: Eurocentrism in History and its textbooks



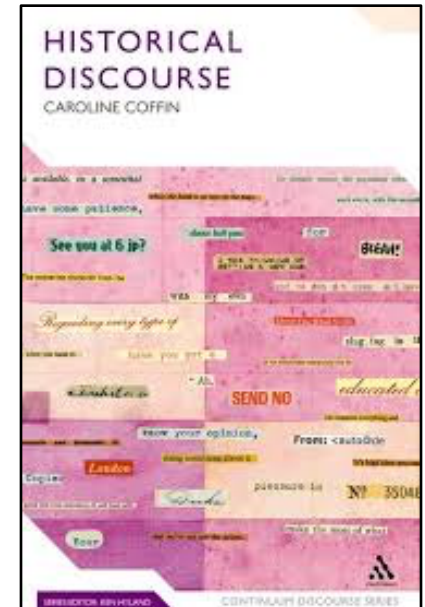
The knowledge of History

1. The knowledge of History is not just “about what happened, it is also about how we evaluate what happened” (Rose & Martin 2012)
2. The interpretation and expression of evaluation about the significance of past events is an important part of the History curriculum (Martin & Wodak (eds.) 2003)



The language of History

1. Specific linguistic resources and techniques are involved in the discourse of history (Coffin 2006)
2. The identification of how events are evaluated in textbooks poses a threefold challenge to students:
 - (i) different linguistics resources
 - (ii) explicit and implicit evaluation
 - (iii) different views in the same text



Access to evaluation

1. Approaching texts with linguistic tools allows students and teachers to grasp meanings more effectively (Achugar & Schlepppegrell 2016, Moyano 2011)
2. The Appraisal system provides categories for the identification of evaluation in History texts (Coffin 2006)
3. Several tools are available to identify evaluation when the ideological positioning is not explicit in the text (Oteíza & Pinto 2011)



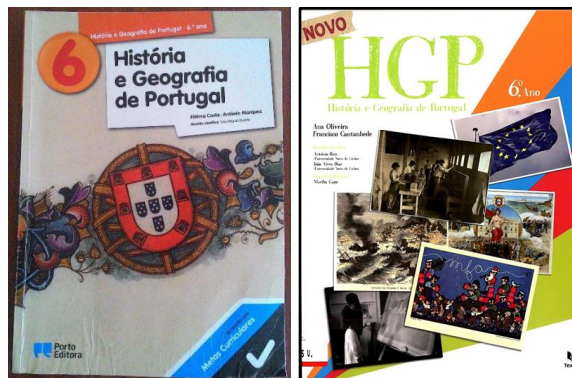
3. The data

10 History textbooks of Upper Primary Education

Grade 5



Grade 6



Grade 7



Grade 8



Grade 9



Texts were selected and categorized under the following topics:

The Portuguese in Africa, Asia, and America (XVI th century)

The Spanish in America (XVI th century)
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The Dutch and the English bourgeoisie (XVII th century)
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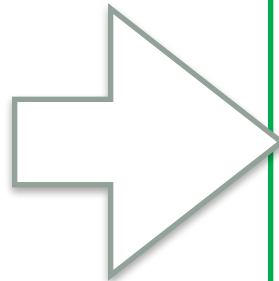
The Europeans in Africa and America (XIX th century)

The French in Portugal (XIX th century)
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The European nations and the 1st World War (XX th century)

The German and the Japanese in the 2 nd World War (XX th century)

17 verbal texts were selected and transcribed.



A disputa dos mares

A crise do Império Português do Oriente

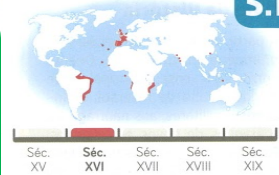
No final da primeira metade do século XVI, o Império Português do Oriente tinha alcançado o seu apogeu, graças à numerosa rede de feitorias e fortalezas espalhadas pelos oceanos Atlântico e Índico, defendidas por uma poderosa força militar e navios de guerra bem equipados.

Contudo, a partir de meados do século XVI, várias razões contribuíram para a crise do Império Português do Oriente:

- uma **deficiente e dispendiosa administração** de um império vasto, disperso e longínquo, com **falta de recursos** financeiros e militares, o que obrigou, por exemplo, ao encerramento da feitoria da Flandres e ao confronto com numerosos inimigos (Turcos, Holandeses, Franceses e Ingleses) que atacavam territórios portugueses no Oriente (docs. 1 e 2);
- a **má aplicação dos lucros** obtidos com o comércio, que eram, em grande parte, gastos em bens de ostentação e de luxo;
- a **reanimação das rotas do Levante** pelos Muçulmanos, que faziam chegar à Europa, novamente por terra, os produtos orientais, nomeadamente as especiarias, fazendo concorrência com os vendidos pelos Portugueses (doc. 1);
- os **naufrágios**, provocados por carga excessiva, por tempestades e por ataques de inimigos (docs. 1 e 4);
- uma maior e mais eficiente organização da **pirataria** e do **corso** que, ao atacarem as armadas portuguesas, provocavam grandes prejuízos. Os corsários eram apoiados pela Holanda, França e Inglaterra;
- uma gradual ocupação (ou tentativa de ocupação), por parte dos inimigos de Portugal, dos territórios do Império Português do Oriente (docs. 2 e 3).

Apesar da situação de crise no Império do Oriente, o comércio com o Extremo Oriente continuou a efetuar-se mas agora com produtos, como as sedas, as lacas e as porcelanas, oriundas de Malaca, das Molucas, do Japão e de Macau. Contudo, os lucros obtidos com a comercialização destes produtos eram inferiores aos que se tinham conseguido durante o período em que Portugal teve o monopólio do comércio das especiarias.

No mesmo período em que Portugal se debatia com a crise do seu Império, a **Espanha**, pelo contrário, vivia uma **época de prosperidade**, de vida, principalmente, à abundância de metais preciosos originários dos seus territórios na América.



5.1

Não confundas...

Corso: Atividade marítima caracterizada pelo assalto a navios de comércio para os capturar e apoderar-se da sua carga. Os corsários encontravam-se autorizados e protegidos pelo monarca do seu país de origem.

Pirataria: Verificava-se quando os assaltos a navios em alto mar eram praticados por piratas, a título individual, com o objetivo de se apoderarem das riquezas transportadas pelos barcos que assaltavam. Estes homens, desligados da obediência a qualquer autoridade, acumularam fortunas consideráveis.

Continuo o fio da História...

1. Refere duas razões internas e duas razões externas que tenham contribuído para a crise do Império Português do Oriente.
2. Na tua opinião, a crise do Império Português do Oriente foi causada, principalmente, por razões militares, por razões económicas ou por ambas? Justifica.

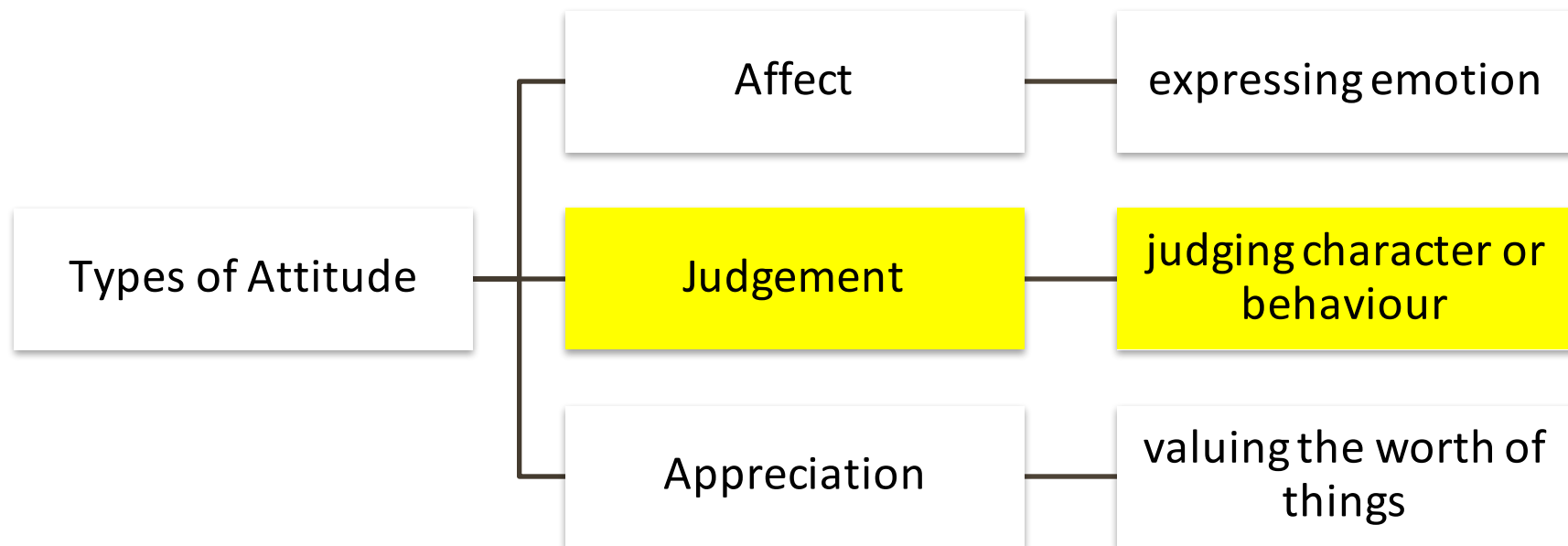
PARA A PRÓXIMA AULA

Sabendo que a palavra «união» significa junção, ou reunião, qual será o significado de «União Ibérica»?

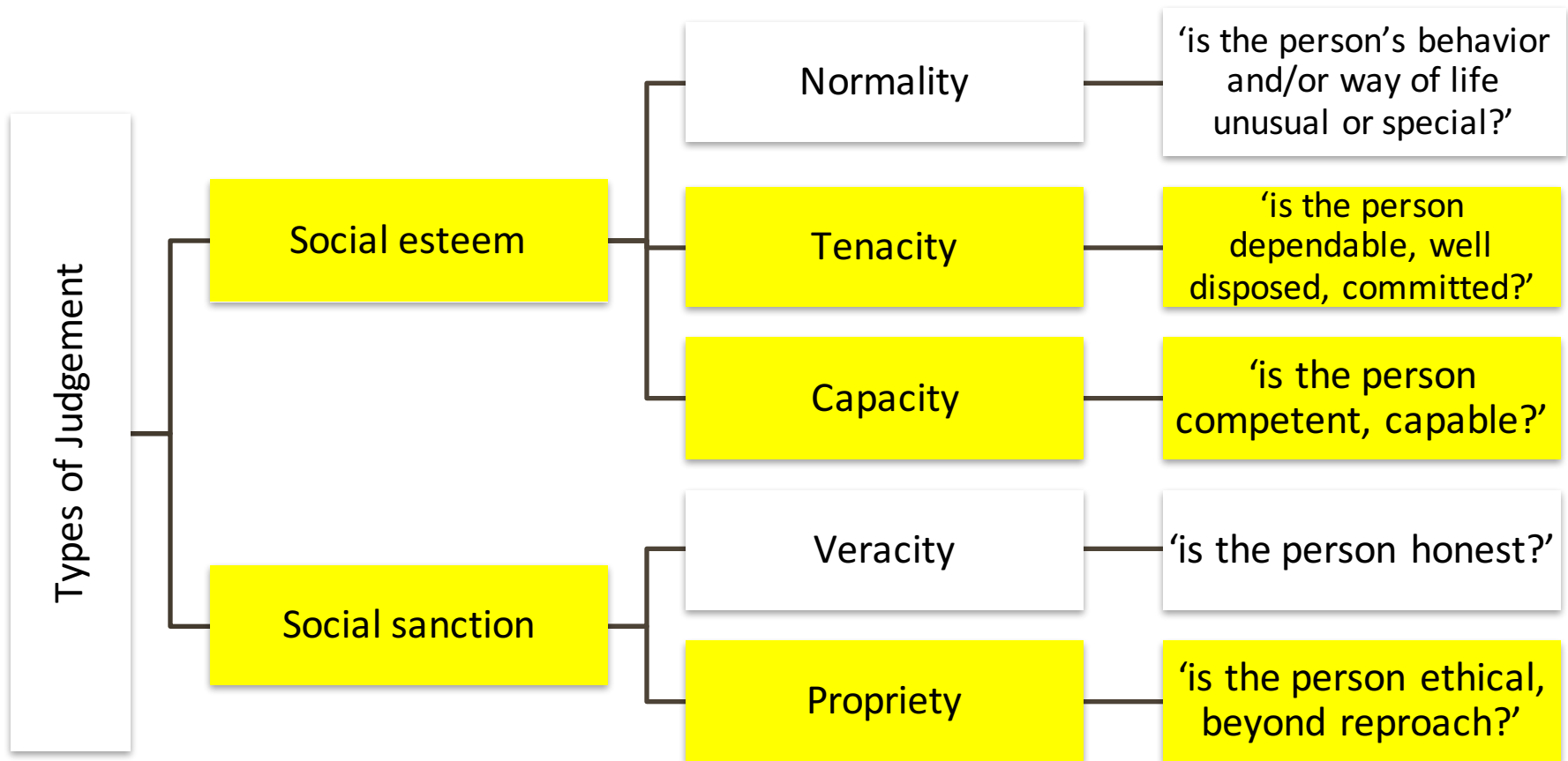


4. Categories of analysis

Tools for analysing discourse semantics



(Coffin 2006, Martin & Rose 2007, Rose & Martin 2012)



(Coffin 2006, Martin & Rose 2007, Rose & Martin 2012)

Examples from the *corpus*

Tenacity

'is the person
dependable, well
disposed, committed?'

Positive tenacity

Portugal, a long time ally of England, did not obey Napoleon's orders. Consequently, our country was invaded by the French troops. ... In face of the violence of the oppressors, civil revolts occurred all over the country.

~~Negative tenacity~~

Examples from the *corpus*

Capacity

'is the person
competent, capable?

Positive capacity

*The sea expansion was, first and foremost, an undertaking of the people of the Iberian Peninsula and, specifically, of Portugal. As such, it is important to understand **how a small country like ours was able to position itself ahead of all other European nations.***

Examples from the *corpus*

Capacity

'is the person
competent, capable?

Negative capacity

*In 1810, Napoleon ordered a new invasion of Portugal. This time, the French troops, under the command of general Massena, entered through Beira Alta, with the purpose of conquering Lisbon. **However, they failed. First, they were defeated** in the battle of Buçaco **and, after that, they weren't able to get across** the so called Lines of Torres Vedras, that protected the capital.*

Examples from the *corpus*

Propriety

'is the person ethical,
beyond reproach?'

Positive propriety

All over the country, the French troops disseminated terror: they stole riches from churches and large country houses, burnt down villages and arrested and killed people. In face of the violence of the oppressors, civil revolts occurred all over the country. In aid of Portugal, England sent an army commanded by Sir Arthur Wellesly (future duke of Wellington).

Examples from the *corpus*

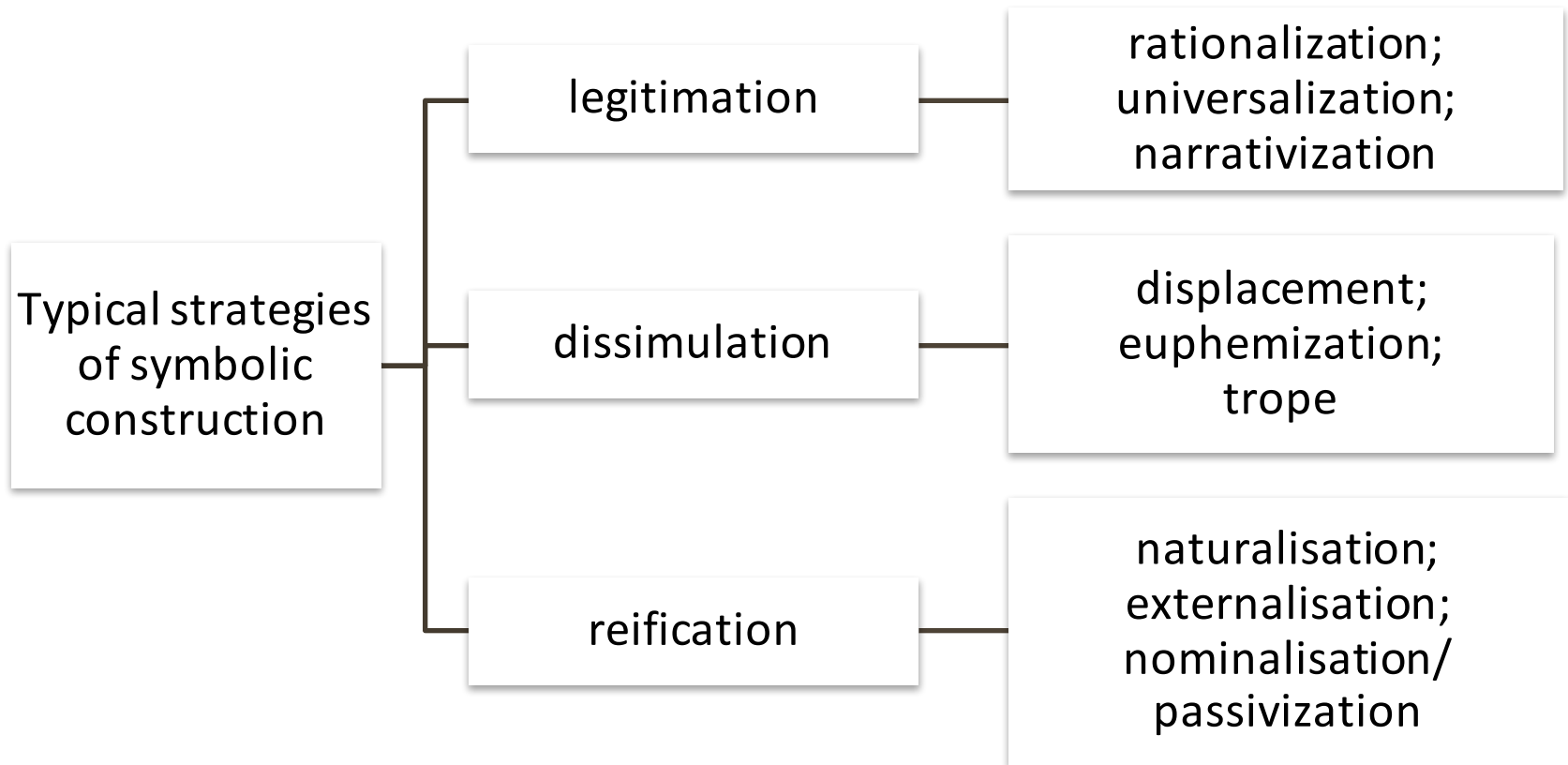
Propriety

'is the person ethical,
beyond reproach?'

Negative propriety

*But **the actions of the Spanish conquerors were brutal and cruel on the American people. Eager for gold and silver, they plundered indigenous treasures and perpetrated massacres.** Around the middle of the XVIth century, with the discovery of silver arteries in Mexico (Mines of Zacatecas) and in Peru (Mines of Potosí), **the Spanish forced the local habitants into hard labour.***

Tools for analysing ideological strategies





5. Results

- Multiple texts address situations where Portugal transposes its geopolitical borders, mainly in the context of the XVIth century.
- These movements and the actions involved are presented exclusively from an 'egocentric' point of view and are positively evaluated.
- The positive evaluation is instantiated in positive polarity words, positive social esteem phrasings and ideological construction strategies.

- ✓ The transposition of national borders is legitimized.

Reasoning about the causes

Favourable conditions for the Portuguese expansion

The sea expansion was, first and foremost, an undertaking of the people of the Iberian Peninsula and, specifically, of Portugal. As such, it is important to understand how a small country like ours was able to position itself ahead of all other European nations.

The supremacy of the Portuguese in the sea expansion can be explained by the following factors:

- geographical localization (...)*
- technical resources (...)*

Besides these factors, Portugal benefited from another important advantage. In contrast with Spain and the majority of the other European kingdoms, Portugal had political unity and well defined borders. The king was held in high esteem and all social groups were interested in the expansion.

✓ Violent events are dissimulated.

Focus on the (positive) consequences

As a consequence of the travels of the Portuguese and the Spanish, international commercial relations suffered important modifications. In fact, the discovery of America and the discovery of a sea route to India opened up a commercial arena on a global scale. In consequence, new commercial routes were established, ... For the first time, regular international trading occurred.

- ✓ The Portuguese empire is presented as a historical fact (part of the natural order of things).

Naturalization

The riches brought in from Brazil, allowed D. João to turn his court into one of the wealthiest of Europe, as it had happened during the kingdom of D. Manuel I, before him.

The royal palace was sumptuously decorated with tile frescos, draperies and carpets. (...)

- Multiple texts address situations where other nations transpose their geopolitical borders, entering Portugal or other nations.
- These movements and the actions involved are almost always negatively evaluated.
- The negative evaluation is explicit and is instantiated in negative polarity words, and mainly in negative social esteem and negative social sanction phrasings.

- ✓ Violent events are foregrounded and judged as inappropriate.

Negative propriety

The Spanish built a large empire in America. But the actions of the Spanish conquerors were brutal and cruel on the American people. Eager for gold and silver, they plundered indigenous treasures and perpetrated massacres. Around the middle of the XVIth century, with the discovery of silver arteries in Mexico (Mines of Zacatecas) and in Peru (Mines of Potosí), the Spanish forced the local habitants into hard labour. Being short of manpower, they also brought in slaves from Africa.

The diseases introduced by the Spanish and the black slaves, together with the ambition and violence of the conquerors led to the disappearance of the majority of the indigenous population and to the destruction of the Amerindian civilizations.

- ✓ Violent events are foregrounded and judged as inappropriate.

Negative propriety

When arriving in Lisbon, Junot took Portugal's government in his hands, on behalf of Napoleon Bonaparte. All over the country, French troops spread the terror: they stole riches from churches and mansions, they burnt villages and killed people. (...)

During the invasions (1807-1811), the French soldiers committed, as you now, many acts of destruction, robbery and killing. On the other hand, they spread the liberal ideas of liberty and equality which, quickly, won a lot of followers in Portugal.

Lexical evidence of explicit negative evaluation:

Adjectives	Nominalizations	Nouns	Verbs
<ul style="list-style-type: none">- brutal and cruel- hard (labour)- heavy (taxes)- violent (acts)	<ul style="list-style-type: none">- destruction- disappearance- exploitation- invasion- massacres	<ul style="list-style-type: none">- ambition- diseases- terror- violence- plunder- war machine	<ul style="list-style-type: none">- burnt (villages)- committed massacres- dominated- enprision- exploited- forced into hard labour- impose (the language)- killed (people)- plundered- spread (the terror)- stole- subdued- used (slaves)

To sum up

Portugal

- Legitimate motivations
- Few (or no) references to violent actions
- Focus on (naturalized) causes and (positive) consequences

Others

- Motivated by greed and power
- Multiple references to violent actions
- Multiple references to negative consequences



6. Final remarks

Pedagogical intervention

1. History teacher's training must include linguistic tools for working with texts
2. Detailed Reading strategies are necessary to scaffold students in the learning of History
3. The identification of how events are evaluated is crucial

Further research

1. To analyze textbooks tasks, and multimodal texts in the same textbooks
2. The analysis of student texts
3. Extend the scope to other school years textbooks

Muito obrigada!
Thank you!
Mange tak!

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